Typical Workflow

• Create a course
• Create a reading list
• Add citations to the reading list
  • Repository items – need to gather items
  • Personal copies
  • eBooks & other eResources
• Alma automatically publishes to Primo and unpublishes at end of term
• Return items to permanent location at end of term
Pain Points

- Gathering materials
- Finding reserves in Primo
- Renewing courses
- Deprocessing courses
And, of course...

no storage for scanned e-reserves

• Stop doing library mediated e-reserves – like the UW

• Use an outside system like ERes, Ares a Learning Management System or something homegrown

• Use a separate server and create links in Alma to files
Lots of paths for gathering materials
-- pick your poison

Personal hold for reserves staff
*Fatal flaw:* hard for multiple people to track requests

Personal hold for fake patron – reserves unit
*Fatal flaw:* local policy does not allow

Move temporarily from within reserves list
*Fatal flaw:* records are changed without routing items through staff to affix stickers & no course notes on transit slips

Work orders
*Fatal flaw:* no notification when work orders are cancelled
Workarounds

• Move temporarily from within reserves list
  • Using course name/number as temporary call number
  • Staff training to notice new materials
  • Outside tracking is helpful

• Work Orders
  • Outside tracking
  • Create form for cancelling work orders
  • Have staff send email when cancelling work orders
  • Use analytics to track cancelled work orders
### Analytics for tracking

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Request Date</th>
<th>Request Details</th>
<th>Bibliographic Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Type Code</td>
<td>Request Date</td>
<td>Status (latest step)</td>
<td>Title</td>
</tr>
</tbody>
</table>

### Physical Item Details | Request Details
---|---
Barcode | Note | Cancellation Reason | Cancellation Note |

### Additional Information

- **Request Type Code**: equal to / is in reserves
- **Request Date**: equal to or greater than TIMESTAMPADD (SQL_TSI_DAY, -10, CURRENT_DATE)
- **Cancellation Reason**: equal to / is in ASRS cannot fulfill request; Booking request passed its return date; Patron no longer interested; Request switched; Request was changed due to update; Request was completed; Request has been cancelled

---

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by using the SQL WHERE clause.
Purchase Requests

• Email and outside tracking
• Integrated purchase requests in Alma – new feature
  • Possibilities for internal workflows and tracking

Consider eBooks for reserves purchases
Finding Reserves in Primo

• Delay in publishing from Alma
• Sometimes courses don’t publish
• Confusing facets
• Limit in number of courses in facets
• Single letter/common word course names give too many results
Workarounds

• Clear labels for courses in item record

• Lots of staff training
• Help videos for students
• Self-service reserves shelved by course
• Avoid Primo entirely and use LMS
Course: Western Washington University uses Canvas

Quarter: Spring 2016 (Retain Through: Summer 2016)
Department: Library
Course Number & Section: 111
Title: All Sections

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Instructors: For full information about course reserves, please see: http://libguides.wwu.edu/reserves

<table>
<thead>
<tr>
<th>Number</th>
<th>Material Type</th>
<th>Title</th>
<th>Author</th>
<th>Reserve Type</th>
<th>Location</th>
<th>Call Number</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Electronic</td>
<td><em>Argument</em> Short guide to writing about history, sixth edition. by R. Marius and M. Page, pp.72-77.</td>
<td>Marius: Page</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>0</td>
<td>Electronic</td>
<td><em>Canadian charter of rights and freedoms</em></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>External Link</td>
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<tr>
<td>0</td>
<td>Electronic</td>
<td><em>Killing us softly 4 (streaming video)</em></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Streaming video @ link</td>
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<td><em>Polish 'Dionnies': gender, ethnicity, and immigrant workers in post-second world war Canada.</em></td>
<td>Sangster</td>
<td></td>
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<td>EBSCO</td>
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<tr>
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<td>Physical</td>
<td><em>Navigating English grammar: a guide to analyzing real language</em></td>
<td>Lobeck</td>
<td>2 hour</td>
<td>Haggard 2</td>
<td>PE1112 LS87 2014</td>
<td></td>
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<tr>
<td>6</td>
<td>Electronic</td>
<td><em>Going to the sources</em></td>
<td>Brundage</td>
<td></td>
<td></td>
<td></td>
<td>This is an Ebook</td>
</tr>
</tbody>
</table>
Renewing Courses

Many steps to renew a course:
• Update course record
• Update reading record
• Change expiry date on each item
  (Bulk renewing doesn't work!)

and after a while...

It gets very confusing – sometimes easier to start from scratch
Deprocessing

• Courses unpublish themselves
• Need to send items home

*Pain point: deleting personal copies*

• Let Alma delete them automatically – we’ve been too scared to try!
• Create set and send set to cataloging for deletion
  • Manually enter items into set
  • Create permanent suppressed location for personal copies & use logical set
It's not all about Alma!
Relationships & Services
Redefining Course Support

• Reserve staff are on the front line of service
  • Working at service desks
  • Years of contact with faculty and departments

• One Library – Many Faces
  • Refining the art of collaboration
  • Learning the art of referrals
Bimonthly reserves staff meetings

• Goals: Build community, invest in staff, be campus nexus for course support
• All library staff invited
• Recent topics included: Copyright & Fair Use, License Agreements, Instruction, Open Textbooks, Streaming Media
• Meetings recorded and streamed
• Opportunities for networking
Student Directed Reserve Requests

• Required texts purchased and put on reserve from student request

• #TextBookBroke & student empowerment

• Same workflow as requests originating from faculty
An End to ERes

• LMS like Canvas integrates better into course work
• Scanning easy and widely available
• More digital material available

• Help faculty transition – a flash drive goes a long way
• Chapter scanning by ILL
• Webpage & email to create proxied links
Attending Academic Departmental Meetings

• Short presentation about services

• Answer questions

• Bring departmental liaison

• TA Bootcamp

• Integrate library staff with curriculum planning
Online Guides

Helping those that prefer to help themselves

• Step-by-Step Guide to Copyright Compliance
• Creating Stable Links to Journal Articles
• FAQ
Digital Delight - eBooks for Reserve

- eBooks can be a great choice for reserve

- Check the license! - Needs to allow many users at once
  - Plan for unlimited/multiple concurrent users for all eBook purchases

- Even single user license has better access than a print book – but hard to explain

- Work well with Alma & with Canvas LM:
What are you doing? ...