**Reserve Task Force Discussion Items**

**Updated on 11/15/16**

* Lag time in publishing from Alma to Primo (6 hours to 1 day)—How should circ desk staff look up course reserve availability accurately at all times? Come up with recommended workflow.--ADRIAN

Options:

1) Keep a manual list at each work station (con: not available to patrons plus a lot of work)

2) Look up in Alma by title/call number (con: info not available to patrons, also student would need to know the title and or call number).

3) RSS feed in course reserve search screen – on the side of primo

4) API (San Marcus)--timely course reserve info to all patrons. Can customize to make it the way you want it to look.

Planned action: Adrian will get more info on API and talk to other Vanguards to see how they are handling this.

Update 11/15/16

* Left message for Steve. Has not gotten back yet.
* Sacramento uses Primo and physical whiteboard for new reserves. (small school so this works.)
* Migrating library materials on course reserve to come over with permanent location. I think Sarina said this is being worked on. What is the status? Do we have choice of permanent or temporary? Can we get both?--DAN

Dan got info from Sarina. She is coming up with procedures for test load. Will need a list of library items currently on reserve in temp location. Need to have barcodes—both temp and perm location will migrate. Should be done in December.

* Electronic reserves (e-reserve: provided by instructor and only people in the course can access) vs. Library eresources vs. third party websites). What can they be done through Alma? WE- assume that library e-resources can go on reading lists but any other e-reserves like pdf's and links would go in through a third party or learning management system. We'll come up with best practice. --ROSS

Options;

1) Have library or faculty member set up through LMS.

2) <https://www.springshare.com/libguides/er.html>

3) <http://www.exlibrisgroup.com/category/Leganto>

From Alma-L listserv so far:

When we migrated to ALMA we also began using ARES for electronic course reserves. ARES is a product of ATLAS systems and has worked well for us.

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The University of Idaho law library migrated from Voyager to Alma in late 2013. In 2015, we set up Reserves in Alma. We used it for one semester. The biggest problem for us was the 24 hour lag between Alma and Primo, we have many last-minute submissions. The setup in Alma was pretty easy, but the interface to Primo is really not intuitive or easy to use in any way. This past fall we switched to Springshare’s Reserves module and have been very pleased. So if you’re using a discovery layer that’s different from Primo, Alma reserves may work fine, but we found them very difficult and not user-friendly at all.

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We have had very bad luck with reserves in general. We’ve been unable to get e-reserves show up at all. We use Springshare.

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Planned Action:

* Ross will continue to explore. Working on discussing with his campus.
* Cathe will continue to gather Alma-L listserv feedback
* Dan demo'd Springshare e-reserve that they currently use: (files 10MB max, keeps stats on use; password protected access all e-reserves for the course). Dan will try adding the springshare list to reading list in Alma. Will give more info next time on setup/experiences.
* Configuration—consider making each checkout period it's own location so it will show up easily in Reading List and in Primo.--CATHE

Cathe set up configuration in CPSLO test load with policy based and location based checkout periods. See screenshot of reading list. It is very easy to tell what the checkout policy is with the location based policy—though note that the code is what displays so make sure to use descriptive code. Assumption is that it will show up in Primo but with location name rather than code so patrons can tell the checkout policy of the course reserve they are interested in.

* Can we have an automated feed from Moodle to Alma of courses/instructors? Reading lists? Is third party integration already considering this?--CATHE

It seems there is a Learning Management System Integrations Task Force. Here is the link: <https://calstate.atlassian.net/wiki/display/ULMSS/Learning+Management+System+Integrations+Task+Force> . Looks like the last meeting on this was 10/19/16. From what I can tell, it looks like their coming up with what they would like the application to do but nothing is in progress yet.

Planned Action: Cathe will work on getting more details on status/plans.

* Instructor entered reading lists—BILL

Bill is working on reading thru documentation and looked at APIs.

Planned Action:

* Bill will talk to programmers at his site.
* Bill will survey CSUs and listserv to see if anyone is going this and what works/what doesn't, etc.
* Holds/Course Reserves Waiting List – is there a way to automate this in Alma, perhaps using holds?--ROSS

Planned Action:

* Ross will test this process in Alma with a 15 minute remove from hold shelf.
* Ross will see if there is a way to get stats on items with many hold requests so he can see which materials need additional copies.
* Cataloging personal copies – Come up with best practice. This was demonstrated in the training session last week. We will revisit if necessary.
* Fees –fees that discourage abuse of keeping reserves past due time but are not too outrageous? Do we even want to recommend fees or leave this up to each campus? Is there any benefit to uniform fees for reserves since they are not shared between campuses? Grace periods?
* Booking Course Reserves

1 - immediate

2 – important but not urgent

3 – might be nice to talk about if time permits