**Reserve Task Force Discussion Items**

**Updated on 11/22/16**

* 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.)

Update 11/22/16

The code is open source and I’m most willing to share with anyone, especially the CSU! Each course page does display real-time changes to the list of citations within the course’s reading list (example: <https://biblio.csusm.edu/reserves/course_readings.php?cid=806661910001672>). So, as soon as a citation is added or removed, that will show up immediately.

The page with the list of courses updates every 30 minutes - <https://biblio.csusm.edu/reserves>. The reason for the lag is because is the need to make several calls to the Alma API. However, for us, the list of courses does not change often once the semester starts and waiting 30 minutes for a new course entry to appear was not an issue for us. It is possible to reduce that time further but I have not gotten around to testing that.

The code is available in a public Bitbucket repository located at <https://bitbucket.org/csusmlibrary/primo-alma-course-reserves>.

Please let me know how I can help further. My office number is [760-750-4385](tel:760-750-4385) and my mobile is [760-683-4234](tel:760-683-4234).

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* 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>

Document of compiled responses will be added to Confluence site.

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). Cost is $1500/year. Up to 5GB total storage. $399/year for additional 5GB. $499 one time fee to transfer from existing system. They have not had a problem to keep under 5GB (with cleanup).
* Dan will try adding the springshare list to reading list in Alma. Will give more info next time on setup/experiences.

Update from 11/22/16

* Dan found University of Idaho Library – seems like they link to Springshare right from their website so not actually thru Primo.
* Cathe compiled Alma-L listserve responses. Will send out and post to confluence.
* 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