# Instructor Guide to Requesting Reserves (April 2018)

Getting Started

1. Create your reading list in the new system
2. Associate your reading list with your course
3. Add citations to your list whenever you like
4. Send your list to the library for staff to process items
5. Publish your list for students to see

Access the Course Reserves service

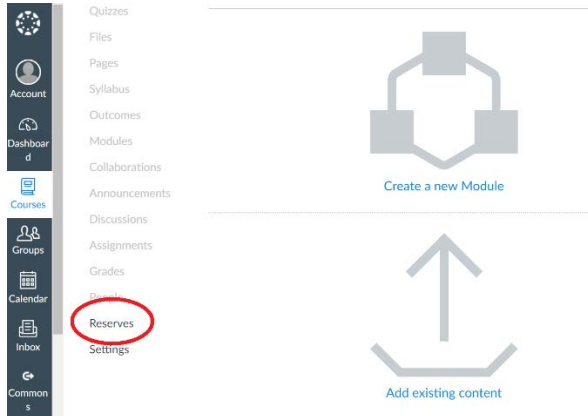### 1. Through the library website

Use the **Course Reserves** link on the Library home page (lib.sfu.ca).
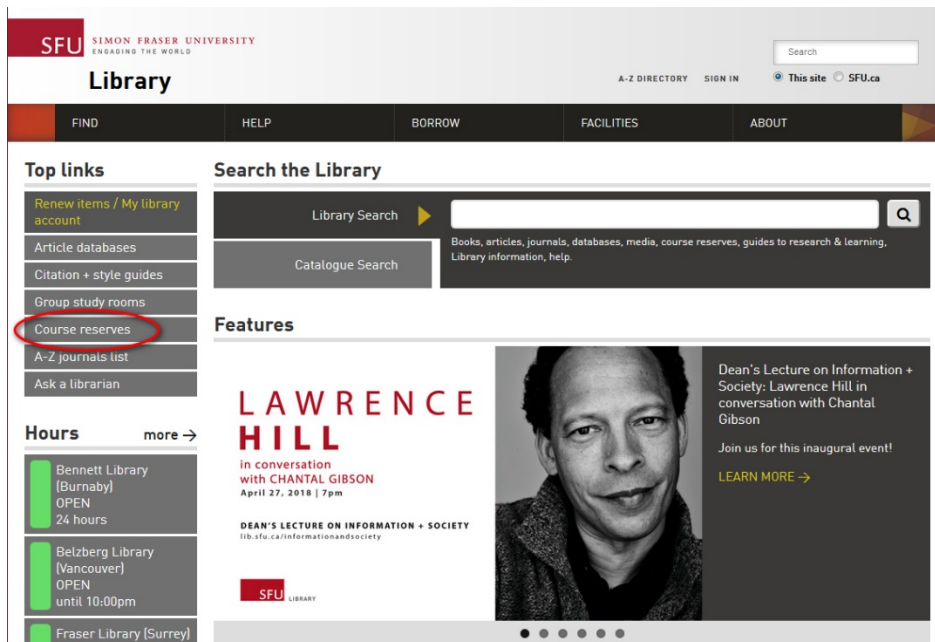
On the Course reserves page log into the **Reserves Requesting System** using your SFU computing ID and password.
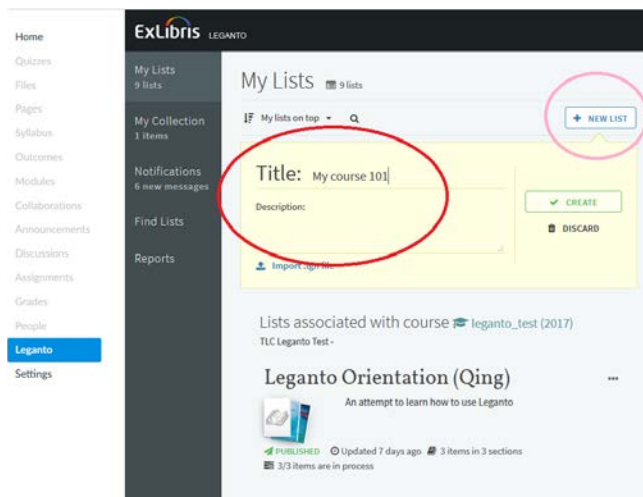
2. Through Canvas

Go to your canvas Course. The **Library Reserves** button should appear on the left hand side near the bottom.


Create your reading list in the new system

To create a new list click on the **+ New List** tab at the top of the screen. Enter a title and optional description, then click "**Create**."


You will be asked to **select a template**: either **Blank** (with no pre-made sections), **Weekly Readings** (with sections created to separate materials by week), or **Books on Reserve** (if you are only placing books aside for students and are not creating a weekly list of articles for students to access).
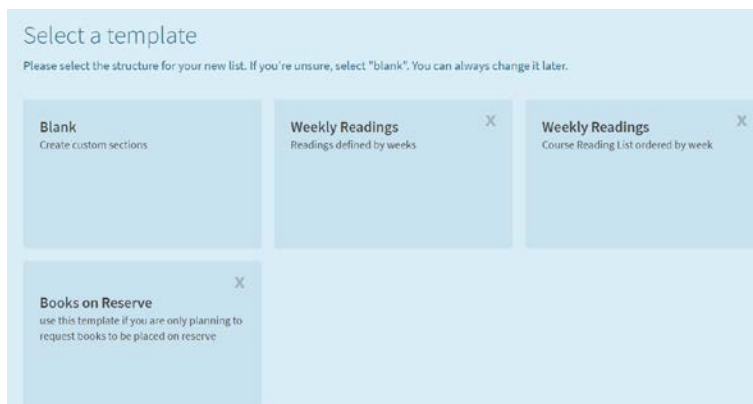
Associate your reading list with your course

You should associate the list with the appropriate course so that students in it will be able to view the reading materials. To do this, click on the "**Associate List**" button. You should see a list of courses for which you are an instructor. Select the relevant course from the drop-down menu.
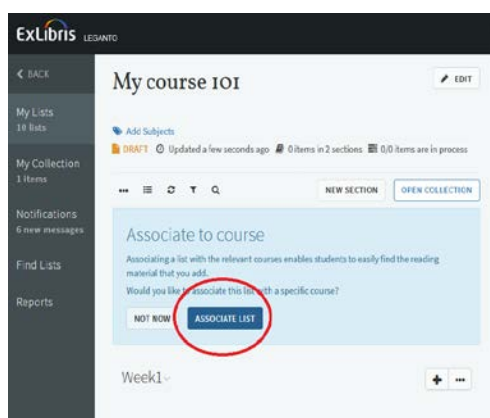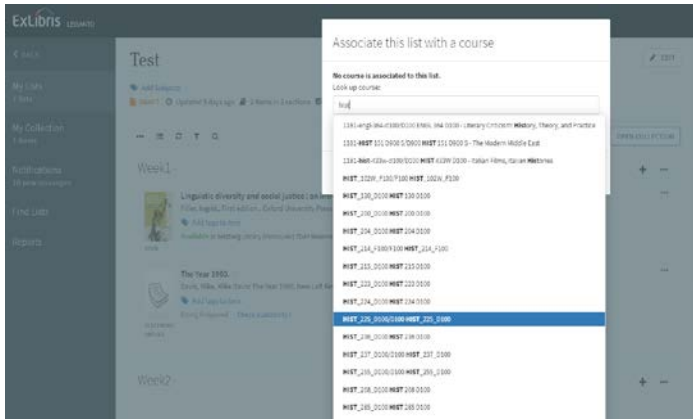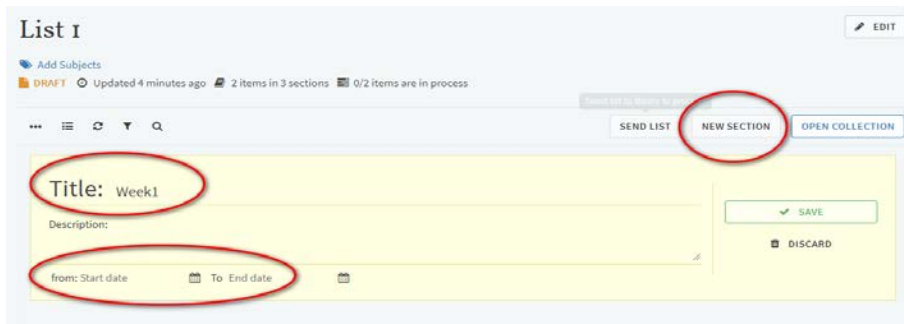
Add citations to your list whenever you like

Sections can be used to breakup the reading list by week or course topic. If you selected the "weekly readings" template it will include sections for weeks in the term.

- Select "**New Section**" to add more sections for additional weeks or topics.
- Add an optional description and start and end dates for each section.

- Change section names and details by clicking the menu icon followed by "**Edit Section**."
- **Drag and drop** sections to change the order in the list.
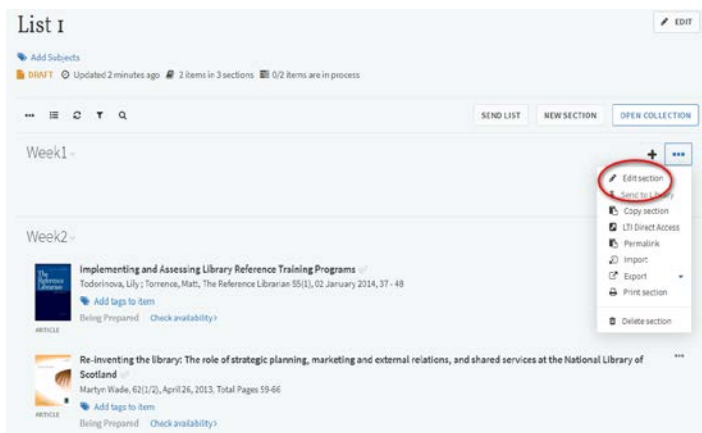
You can add items directly to a reading list, or to your general collection.

- To add items without assigning them to a list, choose "**My Collection**" from the left-side toolbar, then select **+ Add Item.**
- To add items from your collection to a list, click on the list, select "**Open Collection**" and drag and drop the items into the list.
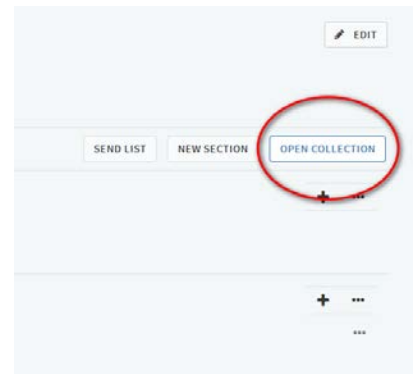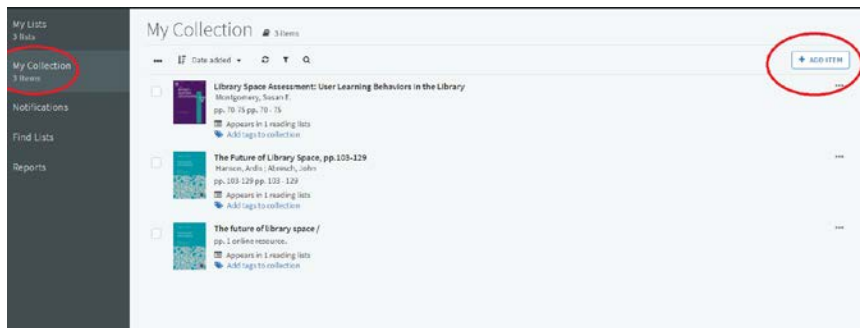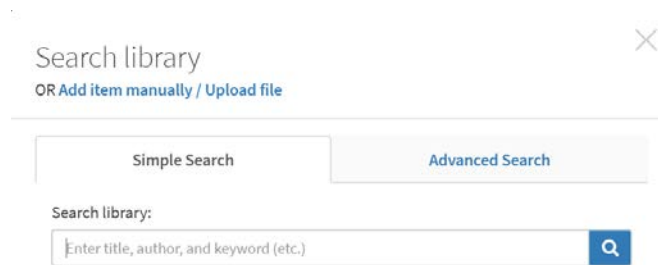

- To add items directly to a reading list, choose "**My Lists**" from the left-side toolbar, and click on the **plus sign** next to the corresponding list.
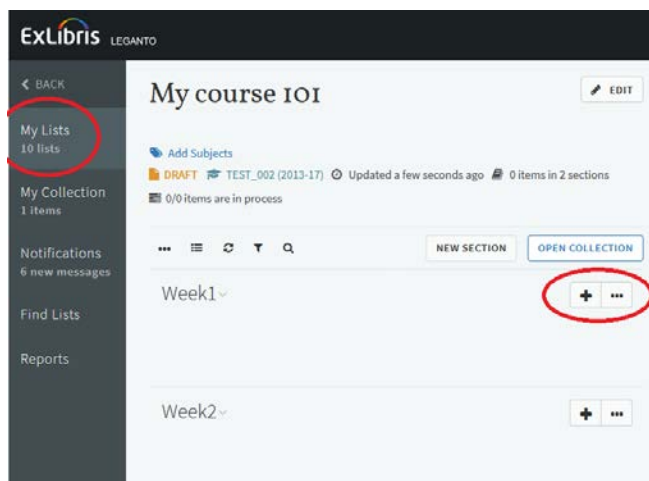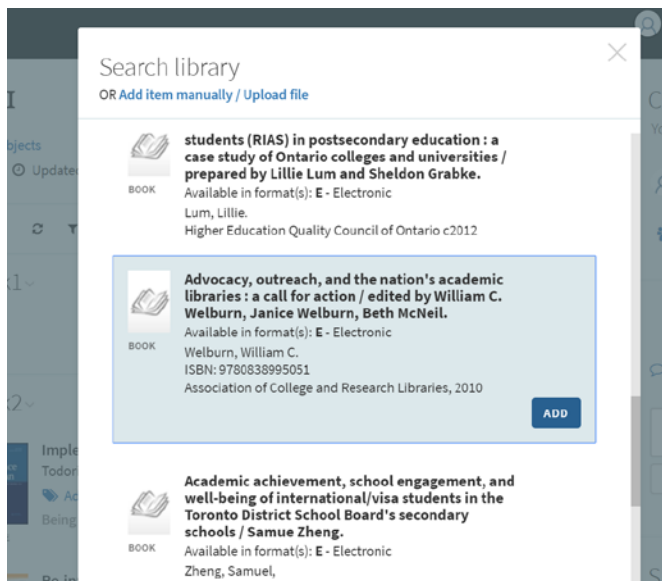
1. Add items using Library Search

Search for items in SFU library by entering the title, author, keyword (etc). You can choose to do a **Simple Search** (a great option if you are searching with keywords), or an **Advanced Search** (ideal for looking for known-items by title or author name, etc).

Browse the search results and click "**Add**" besides items you wish to add to the list.
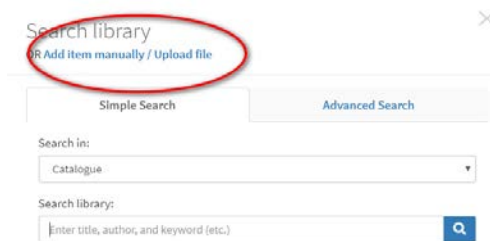
2. Add items through manual upload

Note: You should only manually upload files that are authored by you and do not require copyright clearance. You are required to acknowledge this before completing the upload.

● Click **Add item manually / Upload file**

● Include as many details as possible, including Title, Author, Type (select from drop-down list) and Source.
● Drag and drop the file or click to browse your computer.
● Click on "**More item details**" to add a Creative Commons License, page numbers, volume and issue number, DOI, etc.

3. Add items with Cite it! browser plugin

Cite it! is a browser plugin which allows you to send items to the Course Reserves system directly from the webpage or an online catalogue item page.

Install Cite it! by hovering your mouse over your **user name** in the top-right, then selecting "**Leganto Cite it!**"
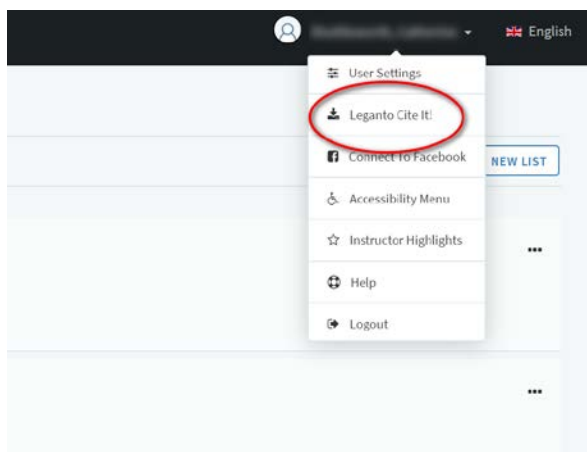
To install the plugin simply drag and drop the blue "**Cite It!**" button to your bookmarks bar.
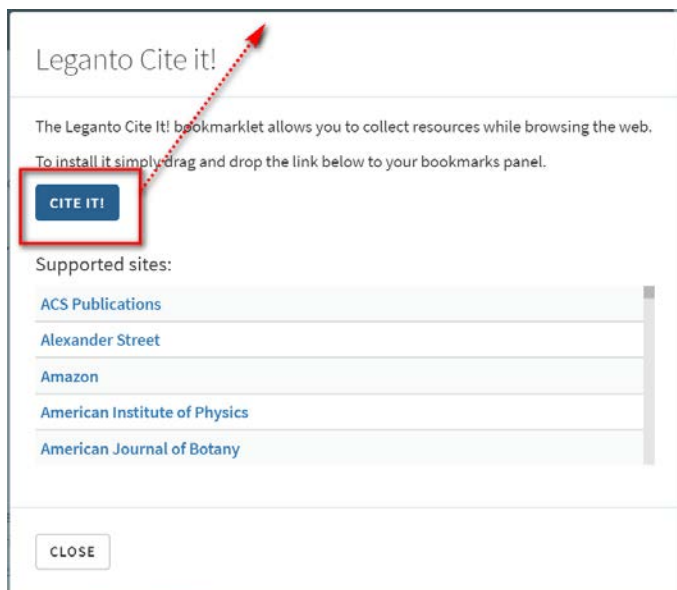
To use the Cite it! plugin, conduct your search as you normally would through the library catalogue, a database, or the Web (see the Library Catalogue Search Guide or the SFU Library Database List to start your search).

Once you have located an item, navigate to the item details page and click the "**Cite it!**" link in your bookmarks bar.

Note: you must have the Reserves software open in a browser window in order for Cite-it! to work.
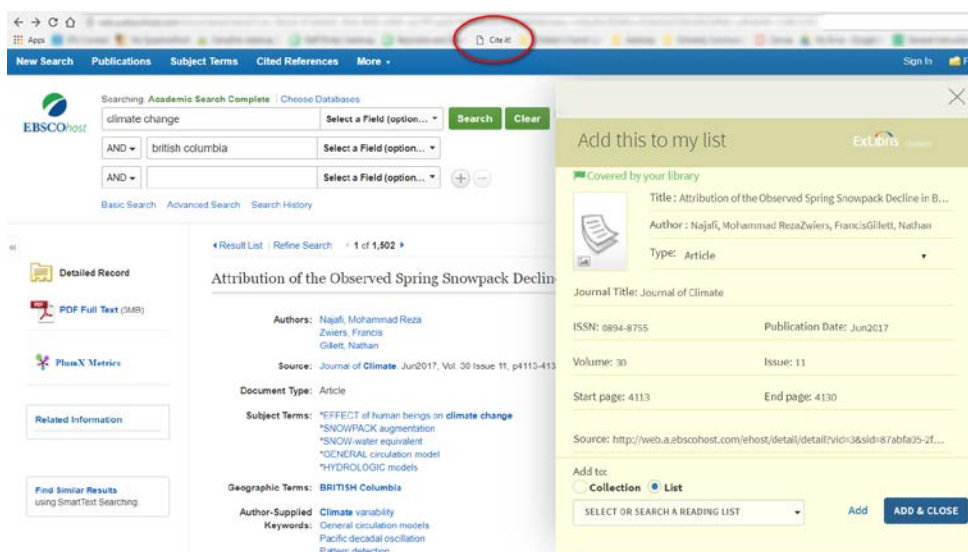
A details window will appear with some item information included automatically. Check the item details and fill-in as much information as possible, then select whether to add the item to your collection or to a specific list.

When you're done, click "**Add & Close**" to add the item to Leganto.

Add tags for special book requests – Loan periods, purchases, and additional copies

Students can borrow reserved books for a limited period of time to ensure that they remain available to other students in the class. You can use tags to set loan periods, request an item for purchase by the library, request an instructor copy of a title, or ask for multiple copies to be placed on reserve.

To add tags for special book requests, select "**Add tags to item.**" Select the appropriate tag from the drop-down list, then click "**Save**." You may add multiple tags to each request.
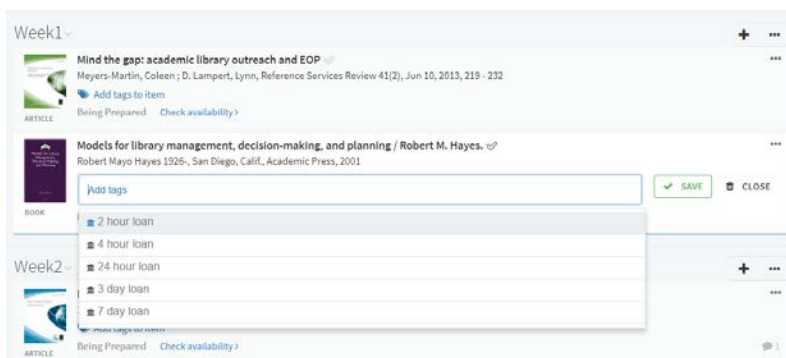
Send your list to the library for staff to process items

Items must be submitted to the library for processing before being made available for students. You can send items individually, by section, or by list.

1. To **send an item or section**, select the menu icon and click "**Send to library**."
2. To send the entire list, select "**Send List**" from the top menu.
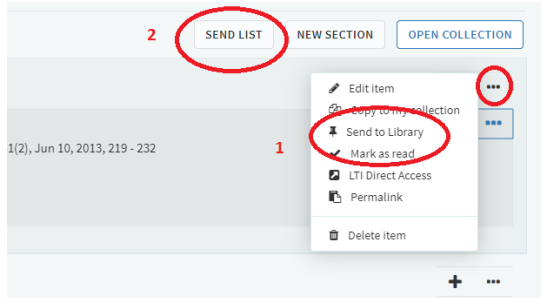
- The **item status** will appear beneath each item (**Being Prepared**, **Sent**, **Complete**).

Publish your list for students to see

Once you've sent the list items to the library for processing, you can publish the list for students to access.

- Select the list menu icon and click "**Publish**".
- Select who can access the list
    - Students enrolled in the course that the list is assigned to;
    - All students at SFU;
    - Anyone, including guests not affiliated with the course or with SFU.
- To **Unpublish** the list, return to the menu icon and select "Unpublish"
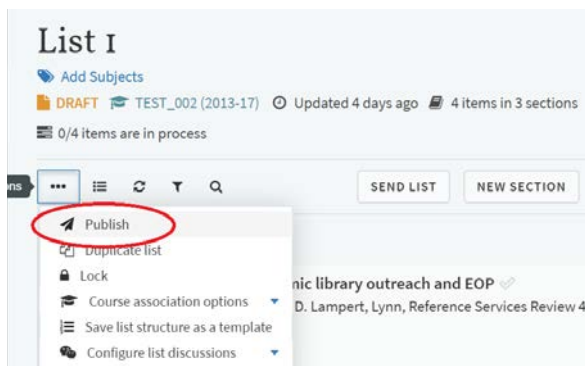
Note: Publishing a list will also send unprocessed items to the library.

To **share** the list or all lists associated with a course, select the menu icon and click "**Permalink**," then select "**To List**" or "**To Course**." Click "**Copy to Clipboard**" to copy the permalink and paste it into an email or document.
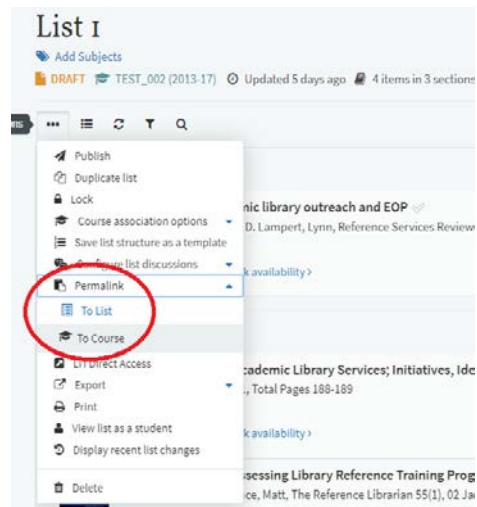
To find a list created by another instructor, select "**Find Lists**" from the left-hand menu, and search or browse by list title, course title, course code or instructor, subject, or faculty.
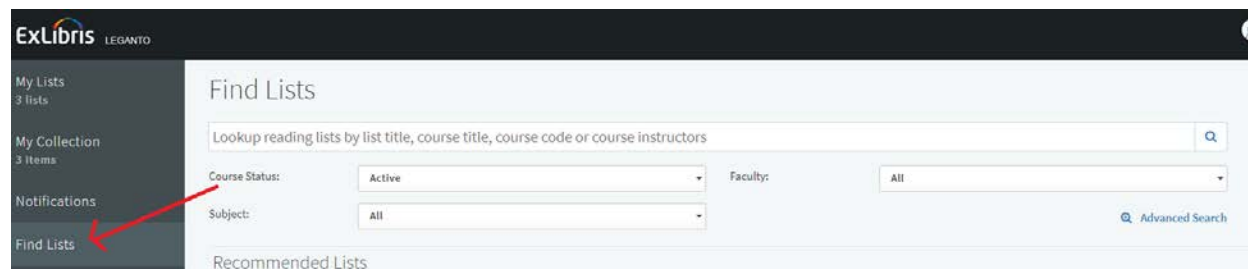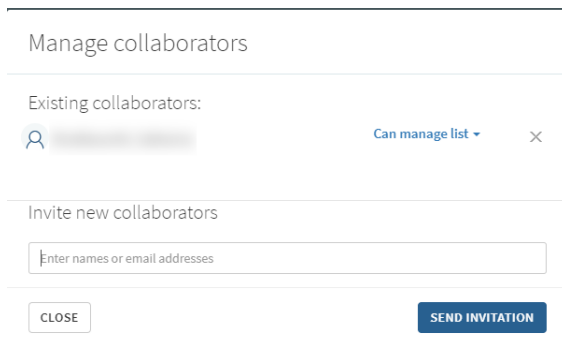
Additional Features

Invite collaborators to manage a list

If you are managing the class in collaboration with others such as another instructor, a TA, department administrators, etc., you can add them as collaborators so they can add, edit, and change the list.

To add collaborators, start by clicking on the list. If the collection and Zotero tabs appear, select "**Close Collection**."

A new Collaborators tab will appear. Click "**Manage Collaborators**" and type in a name or email address of another instructor.

Click "**Send Invitation**" to send an email inviting them to collaborate.

Connect Course Reserves to Citation Management software (Zotero)

If you use Zotero for managing citations, you can connect your Zotero account to the Reserves software to add items directly from Zotero to your reading lists.

To connect Zotero, click on your **User Name**, then select "**User Settings.**"
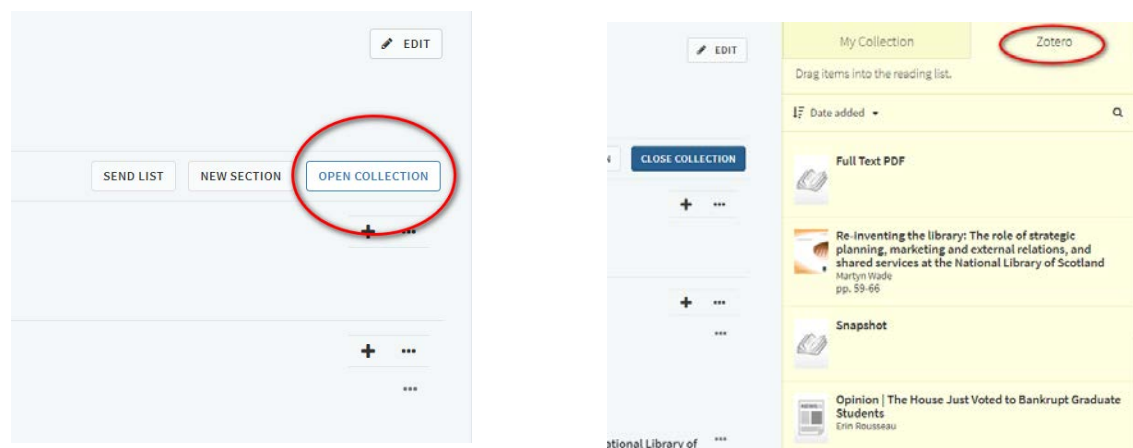
- [Login to Zotero.org](#)
- Follow the instructions on [how to integrate Zotero with Leganto](#) to locate your Zotero ID and API Key.
- Enter the **ID** and **Key**, then click **Save**.

Add items to a list from Zotero or your Collection

To access items from Zotero or your Collection, return to your list and click "**Open Collection**," then select the "**Zotero**" or "**My Collection**" tab.

To **add items** from Zotero or your Collection to your list, simply drag and drop the items from the tab into your list.
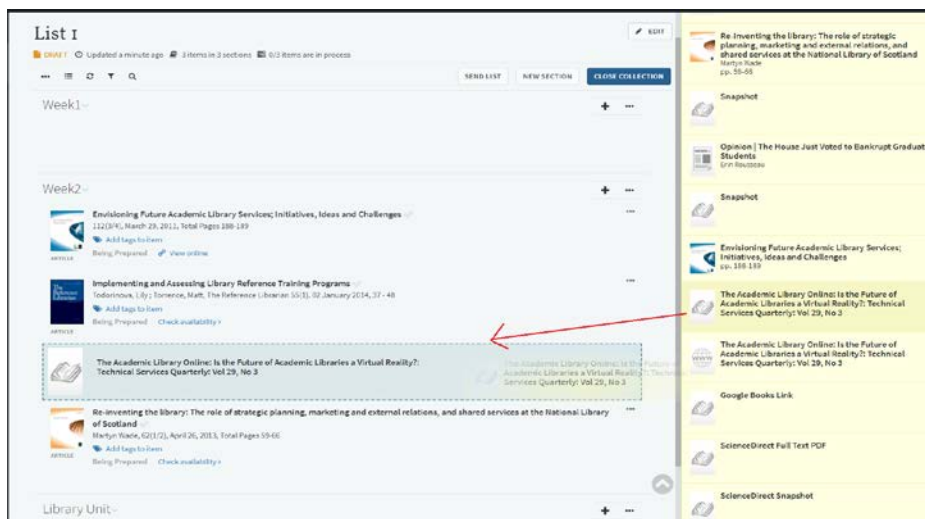

Add comments and notes to items

Click on an item to add a **due date** and a **note**. A public note can be viewed by anyone with access to the list, including students, while a private note can only be seen by you. You can also send a note to the librarian about the item.

Students and instructors can **like** and **comment** on items in the right-side toolbar. As the list administrator you can delete any comments that are made by clicking the delete icon next to the comment.
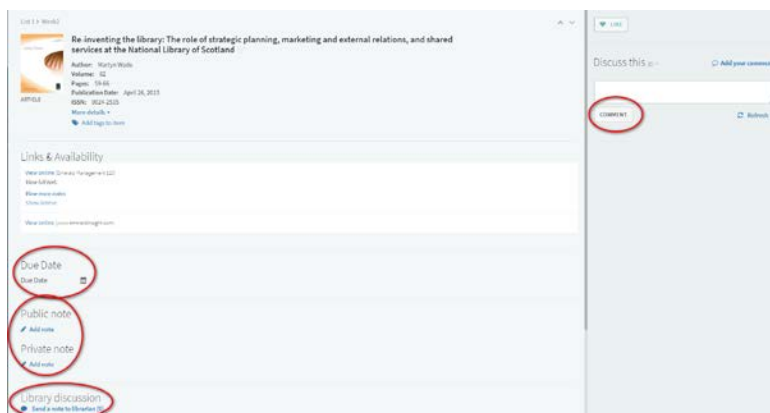

- To **disable student comments** for all items in a list, return to the list menu and select "**Configure list discussions — Hide student discussion thread.**"

- Comments can be enabled at any time by following these steps and selecting "**Show student discussion thread**."
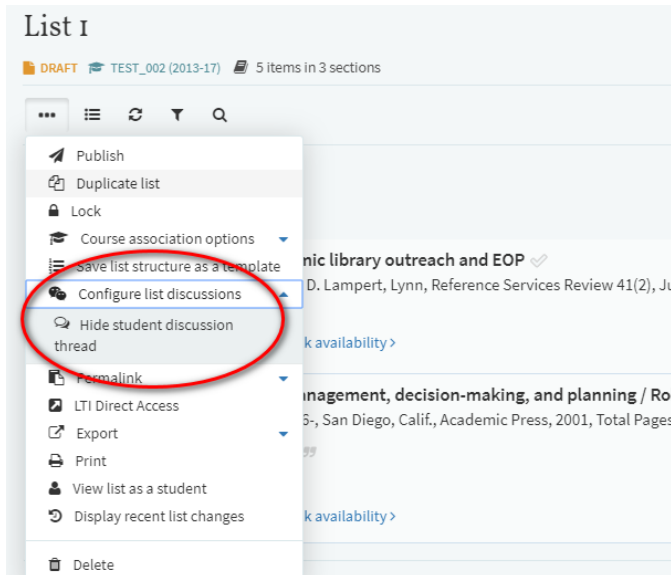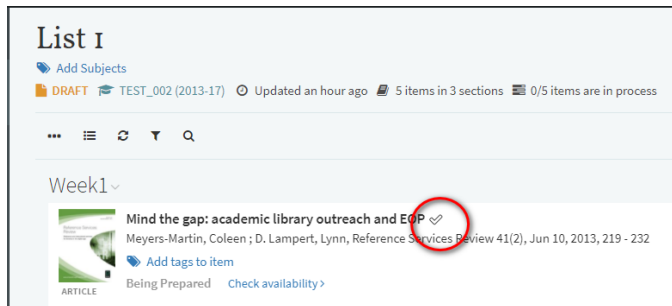

Likes, comments, and views are visible under each item in the reading list. Upcoming due dates appear in the right-hand sidebar until the date has passed.
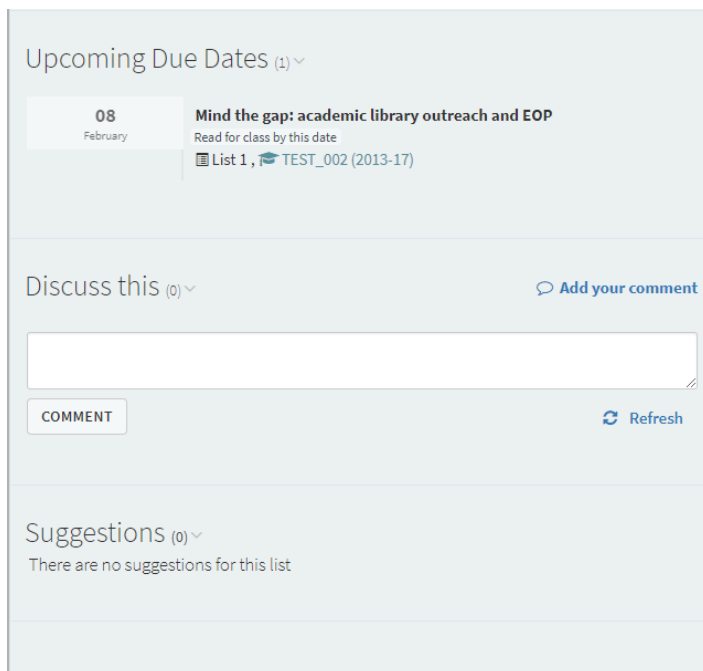
Mark items as read

Students and instructors can mark items as "**Read**" by clicking on a list and selecting the **clear-coloured check mark** beside the item. Each user can only see their own "Read" or "Unread" status, and not those of other users.