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Two Views on E-Reserves

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Current Trends, Challenges, and Opportunities for Electronic Reserves Services at Santa Clara University



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Introduction

Over the last several years, the nearly universal adoption of learning management systems has presented both new opportunities and new challenges for libraries that provide electronic reserves as a core service. In response, the **Santa Clara University Library (SCU Library)** has been conducting a comprehensive review of its course reserves services that has been focused on reviewing workflows, identifying challenges, and discovering best practices that better serve faculty and students.

Background

Santa Clara University is a comprehensive Jesuit, Catholic university with more than 8,800 students located in the heart of Silicon Valley. Founded in 1851 as the first institution of higher education in California, **Santa Clara** offers a rigorous undergraduate curriculum in arts and sciences, business, and engineering, plus graduate and professional programs in business, law, engineering, education, counseling psychology, pastoral ministries, and theology. The **SCU Library** enhances those curriculums through the delivery of course reserves services for all programs except law and theology.

The migration to electronic reserves in the 1990s had an illustrious start at **Santa Clara**. In 1995, **Santa Clara University** professor **Phil Kesten** and library student employee **Slaven Zivkovic** developed ERes, the flagship product for the company they founded, **Docutek Information Systems Inc.**¹ But by 2012, the **SCU Library** began phasing out its use of Docutek ERes. ERes ceased to be supported as of June 2013, as the University moved towards a model of unmediated electronic reserves practices.

Today, the University supports electronic reserves entirely through Canvas, branded at **Santa Clara** as Camino. The Library encourages instructors to use their Camino sites to provide course readings that comply with fair-use guidelines. Most instructors distribute readings that they determine to favor fair-use by posting scanned pdfs of articles and book chapters to Camino. Upon request, library staff will review reserves lists to identify library-licensed content. Library staff will also scan print sources and post pdfs to Camino for instructors, but only after the instructor signs a copyright compliance statement. Some instructors still take advantage of course pack services that are supplied by the bookstore.

Challenges

The **SCU Library's** current electronic reserves practices present four significant challenges.

First, with unmediated e-reserves, instructors may not be as aware of how best to interpret fair-use guidelines as they should be. Additionally, some instructors are under the impression that sharing materials for a course is always fair-use since readings are put behind a password-protected system where only the members of that course can see them, which is not true.

Second, lack of understanding of best practices adversely impacts both the University and students financially. Course packs are very costly for students and likely include articles the Library has licensed, effectively having the student pay for content that is already available to them. A study of a sample of Spring 2016 courses revealed a number of cases where instructors uploaded articles as pdf files rather than embedding links to library-licensed content.

Third, current practices may not be as efficient as they could be. With unmediated e-reserves, the burden of finding and linking to library-licensed content is placed on the instructor. Both instructors and library staff need a faster and easier way to manage copyright permissions and to set up course readings.

Fourth, without deep links to library-licensed content from Camino pages, the Library has no metrics on which collections are used for course readings. There is no way for the Library to know that expensive journals and other content are getting use.

Trends and Opportunities

Instructors are more empowered than ever to take responsibility for providing electronic course readings to their students, reducing the role of libraries in providing electronic reserves. While this has allowed staff to take on other tasks, it has had the consequence of reducing communication between library staff and instructors, diminishing understanding of best practices. Libraries need to get back in the game of providing robust electronic reserves.

Instructors need help from library staff to understand copyright compliance and manage the risk of unintentional misuse of copyrighted material. Students need libraries to acquire and facilitate access to electronic collections via course pages to reduce the high cost of their course materials. Libraries need more and better metrics on e-reserves to support collection development decisions.

Here's what the **SCU Library** is doing to address these challenges and opportunities:

1. The **SCU Library** is launching an initiative to better inform and educate instructors about the options they have for their course reading lists to make sure they are distributing materials legally and ethically, and at the lowest possible cost to their students.
2. The Library can be proactive about reducing the cost of course packs for students by finding new technological solutions that facilitate e-reserves, such as SIPX. In summer 2016, the **SCU Library** contracted with SIPX and will be implementing the service in the fall.

Although instructors bear the responsibility for compliance with fair-use guidelines, libraries also bear a responsibility to provide outreach and structures that assist instructors with compliance. Libraries and campus units must also work together to find ways to reduce the cost of course materials for students. This is an area where libraries can and should take the lead.

Endnotes

1. Dokutek was bought by Sirsi Dynex in 2005. Zivkovic moved on to found Springshare and to develop the widely popular LibGuides platform.

SIPX Electronic Reserves at Pepperdine University

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Pepperdine University is a medium-sized, private university with 12 different campuses, each of which has a library presence. In total, the university libraries have one million books and journals and around 40 staff members,

including librarians. **Pepperdine University Libraries** launched OCLC WorldCat Local as its online catalog public interface in fall 2009 and migrated all Integrated Library System

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(ILS) functions to the OCLC WorldShare Management Services system at the end of 2010. The libraries have continued to add web-based applications to eliminate local server maintenance fees and staff time. Early in 2014, the need to upgrade the server hosting the libraries Docutek ERes e-reserve system accelerated an existing desire to reshape the libraries' workflows and better integrate the e-reserves service with other campus technologies, including the Learning Management System (LMS) Sakai. Library staff wanted to easily set up and distribute course readings without worrying about copyright challenges.

In the summer of 2014, the **Pepperdine University Libraries** selected SIPX as their new e-reserves system. The initial SIPX implementation was a stand-alone service. The SIPX implementation team acquired **Pepperdine's** holdings data from OCLC and loaded it into SIPX. At the same time the team provided training for the library staff. SIPX was used successfully throughout fall semester 2014.

One barrier to easy use remained: students had to create their own SIPX accounts in order to access their course reading lists. Additionally, the reading list links on the Sakai LMS site could not direct students to the reading materials. To alleviate this friction, the library wished to connect SIPX directly with Sakai. At the end of 2014 the Sakai system was upgraded and **Pepperdine** installed a SIPX plugin along with a set of validation keys that allowed the Sakai system to pass student and course information to the SIPX system, permitting the creation of user accounts in SIPX and letting users have direct access to their course reading list materials. In parallel with the technology integration process, the library worked with the Sakai team to get custom roles set up for library staff within Sakai and to train library staff. The library staff can now edit some course content

at the SIPX site and send the SIPX reading list links back to Sakai.

In January 2015, library staff began using the SIPX-Sakai integration for e-reserves. First, the staff member accesses the Sakai course to create a course reading list, selects the "Add SIPX" readings tool which directs them to the SIPX site with all the course information. The SIPX search interface returns information about the libraries' holdings as well as availability through public domain, the SIPX collection, and a copyright agent. Results from the library's subscriptions and public domain have no costs, while results from the SIPX collection or via the copyright agent have varying costs. For other items, the library can easily see what is subscribed and what requires a payment which helps in determining if they are in compliance with copyright restrictions. After all the reading materials are found and added to the course at the SIPX site, the library staff can easily inject the reading list into the Sakai course site where instructors and students can easily access readings without any additional sign-on. Because the SIPX software is located in the cloud, library staff can efficiently add new reserves from any computer, anytime, anywhere — even from home.

Some challenges still exist for library staff. Although the school and course box is automatically completed, the library staff had to input a book or journal title or an ISBN/ISSN/DOI number and add the article or chapter title to reduce the amount of search results. This issue should soon be solved, as we are currently transitioning to the new SIPX interface which integrates Summon as search engine and uses one search box. Also, in cases where clearance cannot happen automatically, such as special orders for which rightsholders must be contacted directly by the SIPX team, the wait time for copyright permissions can be excruciatingly long and the article cannot be made available until the permission is received.

Pepperdine faculty and staff anecdotally have been most appreciative of SIPX and like

the fact it is integrated into the LMS Sakai system. **Professor Ron Batchelder**, says, "I believe students should be connected to the library — I used to use the original system of non-electronic reserves as well. In the world of copyright protection, I feel more protected in distributing articles through the library system." The user interface is very intuitive and easy to use. Electronic reserves are highly accessible and eliminate the need to visit the library to retrieve physical reserves for articles and book chapters. Putting materials on SIPX saves **Pepperdine** students' money because they do not have to purchase or copy the materials (the library picks up the copyright tab). The library benefits from greater interaction with faculty under the newly-designed joint workflow that extends the library's participation into the LMS. Additionally, both instructors and the library have deeper insight into student engagement with SIPX readings, and the library has access to a broader view of content usages and cost levels on course materials across the campuses with advanced SIPX analytics data.

Looking towards the future, circulation services have been relocated to a smaller footprint as the main undergraduate library is undergoing an extensive renovation during the upcoming academic year. We anticipate more faculty will become aware of and utilize electronic reserves, as available student study spaces will be reduced. Distance learning, especially at the graduate level, is increasing in scope, and electronic reserves are a good fit for these programs. Documents accessed on SIPX via Sakai are mobile friendly and can be read on a tablet or mobile phone using a mobile web browser. SIPX is very intent on constantly evolving their product, and this fall they have scheduled a series of changes to the workflow around search and license selection plus changes to make the plugin with Sakai more robust. 🌸

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new branding will be implemented across the company's products and services, beginning in early 2017. *Clarivate.com*

Be sure and bookmark the **ATG NewsChannel** website! Did you see **Erin Gallagher's** hot topics post about **Banned Books Week** and why it is important in academic libraries? **Erin** says it was a huge success in her library (**Rollins College**). And we also had a successful Banned Books week at the **College of Charleston!** Speaking of banned books, I was intrigued by a recent article in **Elsevier's Library Connect** called, "A risky proposition: when Elsevier began its academic publishing with banned books" by **Colleen DeLory**. "In the years preceding World War II, as the Nazis rose to power in Germany, **Elsevier** Director **J.P. Klautz** acquired some of the back cata-



Congratulations to **John and Gloria Dove** who were in San Francisco to greet their first grandson. **Elijah William Dove** arrived at 7 pounds 7 ounces on the 7th of September.



logues and new manuscripts of authors who had been blacklisted by the German government because of their Jewish heritage or affiliations that did not align with Nazi ideology." Apparently **Sjors de Heuvel** is currently working on a history of the **Elsevier** company supposed to be out soon. Personally, I wish there was more interest in publishing histories than there currently is. Don't you? <http://www.against-the-grain.com/2016/09/atg-hot-topics-of-the-week-so-hot-they-should-be-banned-93016/>

<https://libraryconnect.elsevier.com/articles/risky-proposition-when-elsevier-began-its-academic-publishing-banned-books>

Nancy Herther is tireless. She has many posts on the **ATG NewsChannel** and the next one coming up will be about **Personal digital archiving**. I just read the draft. Look for it on the **ATG NewsChannel**.

www.against-the-grain.com/

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