

9-2017

## Course Reserves Best Practices Roundtable

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# Course Reserves Best Practices Roundtable

WMS Global Community + User Group Meeting 2017

Dublin, Ohio



# Today's Panelists



**Denise O'Shea**

Head of Access Services &  
Systems



**Jami Powell**

Library Systems Specialist



**Laina Ridenour**

Collection Management  
Associate



**Nathan Schwartz**

Systems Librarian





## Best practices at MSU:

- Submit reserves requests online and in-person
- Use of the Public Notes field in WMS for searching and reporting
- Share permalinks and course URLs with faculty for use within the LMS, email, websites, etc.
- Avoid use of temporary items
- Duplicate Courses whenever possible

## Montclair State University, Harry A. Sprague Library

- Located in Northern New Jersey, close to NYC
- Over 20,000 students
- Went live with WMS in 2014

Assist Patrons

Check In

Discover Items

Enter barcode

Go

Search

Scope

My Library Holdings v

Index

OCLC Number v

Term(s)

3158497 ?

Search Clear

[Advanced Search](#)

Search: OCLC Number = 3158497 (My Library Ho...)

An introduction to Roman law

Item Details: An introduction to Roman law

Reports

[An introduction to Roman law \(3158497\)](#)  
 Item Details

Details Statistics

[Place Hold](#) [Create Schedule](#) [Report Missing](#) [Delete](#)

**Status** Available

**Holding Location** Sprague Library

**Shelving Locations** Permanent Reserves 2 hours  
 Previous  
 Temporary

**Call Number** KJA 147 .N53 1969

**Copy Number** 1

**Receipt Status** Unknown

**Barcode** 33000005249025

**Use Restrictions**

**Cost(s)** \$60.00

**Note(s)** GNHU 384 Renner F17 (Public)

[Edit Item](#)

gnhu 281



Advanced Search

Library Links

Sign In

Course Reserves

My Items (0)

Library

- Libraries Worldwide
- Montclair State University, Harry A. Sprague Library

Format

- All Formats
- Book (3)
- Print book (3)

Databases

- All Databases
- WorldCat (3)

Author

- All Authors
- Frier, Bruce W (1)
- Nicholas, Barry (1)
- Sansone, David (1)

Year

- All Years
- Last 5 Years
- Last 10 Years
- Last 25 Years
- Custom Year Range:

from  through

Change Year

3 results in Montclair State University, Harry A. Sprague Library

Sorted by: Library

1. [A casebook on the Roman law of delict](#)



by [Bruce W. Frier](#)  
Print book ©1989

Held by: [Montclair State University, Harry A. Sprague Library](#)

Available Sprague Library Reserves 2 hours KJA2612.F75 1989

[View all editions & formats](#)

Cite Link Email Save

2. [An introduction to Roman law](#)



by [Barry Nicholas](#)  
Print book 1969, ©1962

Held by: [Montclair State University, Harry A. Sprague Library](#)

Available Sprague Library Reserves 2 hours KJA 147 .N53 1969

[View all editions & formats](#)

Cite Link Email Save

3. [Ancient Greek Civilization](#)



by [David Sansone](#)  
Print book 2017

The third edition of Ancient Greek Civilization is a concise, engaging introduction to the history and culture of ancient Greece from the Minoan civilization to the age of the Roman Empire... [Read More](#)  
Held by: [Montclair State University, Harry A. Sprague Library](#)

Available Sprague Library Reserves 2 hours Reserves B 212

[View all editions & formats](#)

Cite Link Email Save

Send Feedback



Public Note	Call #	Author	Title or Description	Item Barcode	Status	Date Due	Issued Count	Issued Count YTD	Last Issued
ACCT 204 : FUNDAMENTALS OF ACCOUNTING -- C	B-57	Edmonds, Thomas P.	Survey of accounting	33000010226059	AVAILABLE	---	1	1	9/13/16
ACCT 204 : FUNDAMENTALS OF ACCOUNTING -- C	B-58	Edmonds, Thomas P.	Survey of accounting	33000010226067	WITHDRAWN	---	0	0	---
ACCT 523 Pinto...	Reserves	Fraser, Lyn M.	Understanding financial statements /	33000010462332	AVAILABLE	---	7	7	12/1/16
ANTH 102 Taha...	P120.Y68	Mendoza-Denton, Norma.	Homegirls : language and cultural practice	33000010613405	AVAILABLE	---	5	5	4/26/17
ANTH 102 Taha...	Reserves	Ottenheimer, Harriet,	The anthropology of language : an introduction	33000010461706	AVAILABLE	---	13	6	3/23/17
ANTH 150 K McCaffrey...	HN163.5	Lancaster, Roger N.	Life is hard : machismo, danger, and the	33000010526920	AVAILABLE	---	16	0	11/2/16
ANTH 150 K McCaffrey...	Reserves	Kelly, Patty.	Lydia's open door : inside Mexico's most r	33000010460443	AVAILABLE	---	7	2	11/18/16
ANTH 150 K McCaffrey...	Reserves	Lancaster, Roger N.	Life is hard : machismo, danger, and the	33000010460625	AVAILABLE	---	17	9	11/3/16
ANTH 150 K McCaffrey...	Reserves	---	Voices from exile : violence and survival i	33000010437011	AVAILABLE	---	9	4	10/5/16
ANTH 150 K McCaffrey...	Reserves	---	Voices from exile : violence and survival i	33000010460435	AVAILABLE	---	21	5	9/28/16
ANTH 150 McCaffrey...	Reserves	Schul`ller, Markus	Humanitarian aftershocks in Haiti /	33000010462282	WITHDRAWN	---	2	2	12/7/16
ANTH 150 McCaffrey...	Reserves	Schul`ller, Markus	Humanitarian aftershocks in Haiti /	33000010462290	AVAILABLE	---	4	4	12/7/16
ANTH 180 Gerber...	Reserves	Winkelman, Michael.	Culture and health : applying medical ant	33000010461391	AVAILABLE	---	4	4	4/10/17
ANTH 414 01 Refugees -- McCaffrey...	RA418.5	Fadiman, Anne,	The spirit catches you and you fall down :	33000010459510	AVAILABLE	---	3	2	1/24/17
ANTH 440 Gerber...	Reserves	Wiley, Andrea S.,	Medical anthropology : a biocultural appr	33000010462522	AVAILABLE	---	11	11	3/21/17
APLN 532 Wei F17...	P35 .S52	Shaul, David Leedom.	Language and culture /	33000008575103	AVAILABLE	---	1	1	8/10/15
ARHT 102 Kent F17...	N72.P6	P3 Pater, Ruben,	The politics of design : a (not so) global m	33000010659101	AVAILABLE	---	0	0	---
ARHT 200 RESEARCH METHODS IN ART HISTORY	N85 .F475	Fernie, Eric,	Art history and its methods : a critical anti	33000008186935	AVAILABLE	---	10	7	2/12/17
ARHT 200 RESEARCH METHODS IN ART HISTORY	ND1329.E	Seidel, Linda.	Jan Van Eyck's Arnolfini portrait : stories c	33000008103369	AVAILABLE	---	7	3	3/18/17
ARHT 200 RESEARCH METHODS IN ART HISTORY	ND553.M	Collins, Bradford R.,	12 Views of Manet's Bar /	33000009526782	AVAILABLE	---	13	7	4/10/17
ARHT 200 Schuler...	N7480 .A3	Adams, Laurie.	The methodologies of art : an introduction	33000008285646	AVAILABLE	---	5	5	2/12/17
ARHT 340 Hamilton F17...	N6415.B3	Neuman, Robert	Baroque and Rococo Art and Architecture	33000010508100	AVAILABLE	---	4	2	1/26/17
ARHT 350 C Hamilton...	N6757 .C4	Chu, Petra ten-Doesschate.	Nineteenth-century European art /	33000009368524	AVAILABLE	---	10	0	11/17/16
ARHT 601 Kent Fall17...	N6490 .T4	Stiles, Kristine.	Theories and documents of contemporary	33000010412493	AVAILABLE	---	0	0	---
CHAD 210 Robinson...	Reserves	Crosson-Tower, Cynthia.	Understanding child abuse and neglect /	33000010461144	AVAILABLE	---	3	3	2/28/17
CHEM 100 : INTRODUCTORY CHEMISTRY...	B-115	Tro, Nivaldo J.	Chemistry in focus : a molecular view of c	33000010447952	AVAILABLE	---	53	12	5/4/17
CHEM 100 : INTRODUCTORY CHEMISTRY...	B-116	Tro, Nivaldo J.	Chemistry in focus : a molecular view of c	33000010448067	AVAILABLE	---	7	1	2/28/17
CHEM 100 : INTRODUCTORY CHEMISTRY...	B-117	Tro, Nivaldo J.	Chemistry in focus : a molecular view of c	33000010448059	AVAILABLE	---	13	1	2/28/17
CHEM 100 : INTRODUCTORY CHEMISTRY...	B-134	Tro, Nivaldo J.	Chemistry in focus : a molecular view of c	33000010448117	AVAILABLE	---	7	4	4/21/17
CMDA 210...	Reserves	Ott, Brian L.	Critical Media Studies : an Introduction /	33000010462001	AVAILABLE	---	9	5	5/23/17



## Best practices at Centre College:

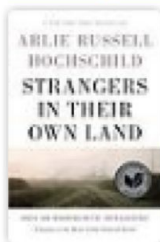
- Create shelving locations that communicate directions and policy (“Ask at Circ Desk,” “3-Hour Closed Reserve”)
- Make workflow as efficient and standardized as possible (that “standardized” part is still a work-in-progress for us)
- We avoid creating “temporary items” for reserves whenever possible.
- Focus on visibility and communication of reserves for students (book-buying decisions; real-time title availability) and faculty (LMS embedding; tracking reserved titles)

## Centre College, Grace Doherty Library


- Small, residential, liberal arts college in central KY
- 1,450 students
- WMS library since May 2016



## 1. Strangers in their own land : anger and mourning on the American right




by [Arlie Russell Hochschild](#)

 Print book 2016

"In *Strangers in Their Own Land*, the renowned sociologist Arlie Hochschild embarks on a thought-provoking journey from her liberal hometown of Berkeley, California, deep into Louisiana... [Read More](#)

Held by: [Centre College Grace Doherty Library](#)

 Available Doherty Library Book Stacks JC573.2.U6 H624 2016

[View all editions & formats](#)

 Cite

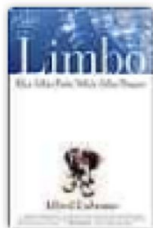
 Link

 Email


 Save

“*What* are the book stacks?”

## 5. [Limbo : blue-collar roots, white-collar dreams](#)



by [Alfred Lubrano](#)

 Print book ©2004

This work of narrative nonfiction uncovers a cultural phenomenon, the limbo existence of people raised in blue-collar families, living white-collar lives. Its approach is threefold: first, t... [Read More](#)

Held by: [Centre College Grace Doherty Library](#)

 Available    Doherty Library **3-Hour Closed Reserve (ask at Circ Desk)**    HN90.S65 L83 2004

[View all editions & formats](#)

 Cite

 Link

 Email

 Save



## Best practices at Butler University:

- Online submission through Formstack
- Confirmation sent to faculty includes Permalink
- Prefer to use only library owned items and try to limit faculty owned items
- For faculty owned items we add holdings to real records and delete when the item is removed.
- Make extensive use of the staff notes fields
- Changed policies when we migrated to WMS  
ex: No more permanent reserves, Cut the options for loan periods to two, 4 hours and 24 hours

## Butler University, Irwin Library

- Located in Indianapolis and home to Hinkle Fieldhouse (Hoosiers)
- Just over 5000 students
- WMS library since May 2014



## Best practices at Southeastern University:

- Running Worldcat Local Reserves
- Waited for temp items to switch to Discovery
- Full training for circ workers
- Item Search→ How do you find which course it is on reserve for?

## Migration Local → Discovery Reserves

- Delete any Discovery Reserves ( or don't create anything)
- Update Local Reserves
- Migrate
- Make updates to both after transition
- Check temp items...(held titles with temp items) (personal copies attached to worldcat, look like owned)

## Southeastern University, Steelman Library

- Thriving college campus in sunny Central Florida
- Over 5000 students including extension campuses
- WMS Library since 2013

# Local to Discovery Reserves Migration

This is a form you can fill out to migrate your Course reserves from Local to Discovery.

[https://oclc.org/content/dam/support/release-notes/discovery/discovery\\_release\\_2017-4-13.pdf](https://oclc.org/content/dam/support/release-notes/discovery/discovery_release_2017-4-13.pdf)

When you migrate course reserves over to discovery the current courses will remain. To clarify the current courses, you have in Discovery will remain in Discovery after you migrate your Local course reserves.

Your Course reserves will remain in WorldCat Local after the migration. We also like to point out that duplication may occur if there are existing courses in WorldCat Discovery.

You can read more about this starting on page 9 of our Release Notes.

[http://www.oclc.org/content/dam/support/release-notes/discovery/discovery\\_release\\_2017-4-13.pdf](http://www.oclc.org/content/dam/support/release-notes/discovery/discovery_release_2017-4-13.pdf)

Have a lovely day,

Carly DiVito  
OCLC • Senior Support Analyst, Management and Customer Operations  
6565 Kilgour Place, Dublin, Ohio USA 43017



# Local to Discovery Reserves Migration

Modified April 6, 2017

## Import Course Reserves from WorldCat Local to WorldCat Discovery

Librarians who set up course reserves in WorldCat Local can now request a one-time copy of this data to course reserves in WorldCat Discovery.

Please consider the following before making a request:

### **Schedule your data move with your institution's implementation of WorldCat Discovery**

Since this is a one-time data transfer, time the move with your institution's implementation of WorldCat Discovery. This eliminates the need to maintain two separate interfaces.

### **Choose to migrate Active, Inactive or All courses from WorldCat Local**

Transfer course reserves data with the following status designators in WorldCat Local: Active, Inactive or All. Be aware that courses with a status of Active in WorldCat Local may not display as Active in WorldCat Discovery, because WorldCat Discovery uses the Active status for courses in progress. So, be sure to review and update course dates to ensure course statuses display as expected.

When moving course reserves data, keep in mind that all items associated with each course also transfers. This includes permanent bibliographic items, as well as temporary materials created in WorldCat Local. Items are attached to a course, so they cannot be transferred separately.

No data will be deleted from WorldCat Local when it is transferred to WorldCat Discovery. However, duplication may occur if there are existing courses in WorldCat Discovery.

### **Request transfer of your library's course reserves data**

Fill out the [Course Reserves Migration form](#) and your request will be processed within five business days. OCLC will contact you to confirm a successful transfer of your library's course reserves data.



## WorldCat Discovery Course Reserves Migration

Complete this form to migrate WorldCat Local Course Reserves to WorldCat Discovery. This is a one-time data transfer.

Name \*

First Last

Title \*

Maximum Allowed: 30 characters. Currently Used: 0 characters.

Email \*

Institution Name \*

OCLC Symbol \*

Migrate \*

- Active  
 Inactive  
 Both

Would you like additional resources to help with your transition to WorldCat Discovery? \*

- No  
 Yes

Additional Comments:

# Discovery Reserves Migration Form

Hello Nathan,

I am happy to report that the migration of your course reserve data to WorldCat Discovery is now complete. As stated in the release notes, this is a one-time copy over action. As a one-time migration, the expectation is that afterwards you will maintain course reserves in Discovery. After the migration any changes/additions made in Local will not be carried over.

As you requested, we migrated courses that were both active and inactive in WorldCat Local. Please note that course status is automated in WorldCat Discovery. Discovery honors the start and end dates of a course to apply the status of active or inactive. This means that regardless of the status in WorldCat Local, imported courses in Discovery will display as inactive if the Start Date is beyond the current date or if the End Date is older than the current date. Any courses with undefined dates will default to active. We recommend taking time to examine the resources available for Discovery. Here are some suggested steps:

- **Review** [WorldCat Discovery training](#) and [recorded tutorials](#).
- **Navigate** to the [Documentation](#) page to find details on settings and configuration, searching Discovery, managing course reserves and to review the complete list of databases available.
- **Connect** with other libraries, **keep up to date** with product updates, and **suggest enhancements** in the WorldCat [WorldCat Discovery Community Center](#).
- **Explore** the [WorldCat Discovery support & training](#) home page.
- **Join us** for [office hours](#) or **contact** [OCLC Support in your region](#) with any questions.

*Course Reserve Migration Request:*

*Name \* NathanSchwartz*

*Title \* Systems Librarian*

*Email \* [nrschwartz@seu.edu](mailto:nrschwartz@seu.edu)*

*Institution Name \* Southeastern University*

*OCLC Symbol \* FYQ*

*Migrate \* Both*

*Would you like additional resources to help with your transition to WorldCat Discovery? \* Yes*

*Additional Comments:*

*Please migrate all temporary items, courses and reserves. I just deleted all the courses in Discover, so Discovery Reserves should be empty. If you find anything in Discovery Reserves prior to migration, please delete it.*

## Migration Completed after three days.

# Discussion / Q&A

# Wrap-up