9-2017

Course Reserves Best Practices Roundtable

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Butler University

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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
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

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
An introduction to Roman law (3158497)

Item Details

Status: Available
Holding Location: Sprague Library
Shelving Locations: Permanent
Reserves 2 hours
Previous
Temporary
Call Number: KJA 147. W3 1959
Copy Number: 1
Receipt Status: Unknown
Barcode: 33000006249025
Use Restrictions:
Cost(s): $60.00
Note(s): GNHJ 364 Renner F17 (Public)

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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
“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
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
Southeastern University, Steelman Library

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

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)
Local to Discovery Reserves Migration

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

https://oclccsd.wufoo.com/forms/s11ksa90hrnv6g/

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.


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

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: 60 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 * nnschwartz@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