Course Reserves Best Practices Roundtable

Denise I. O’Shea
Montclair State University, oshead@montclair.edu

Jami Powell
Centre College

Laina Ridenour
Butler University

Nathan Schwartz
Southeastern University

Follow this and additional works at: https://digitalcommons.montclair.edu/spraguelib-facpubs

Part of the Library and Information Science Commons

MSU Digital Commons Citation

This Presentation is brought to you for free and open access by the Sprague Library at Montclair State University Digital Commons. It has been accepted for inclusion in Sprague Library Scholarship and Creative Works by an authorized administrator of Montclair State University Digital Commons. For more information, please contact digitalcommons@montclair.edu.
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: K14.147.N53 1989
Copy Number: 1
Receipt Status: Unknown
Barcode: 33600005249025
Use Restrictions:

Cost(s): $60.00

Note(s): GN44.3647 Renner F17 (Public)

Edit Item
<table>
<thead>
<tr>
<th>Public Note</th>
<th>Call #</th>
<th>Author</th>
<th>Title or Description</th>
<th>Item Barcode</th>
<th>Status</th>
<th>Date Due</th>
<th>Issued Count</th>
<th>Issued Count YTD</th>
<th>Last Issued</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT 204 : FUNDAMENTALS OF ACCOUNTING -- C.B-57</td>
<td>Edmonds, Thomas P.</td>
<td>Survey of accounting</td>
<td>330000010228059 AVAILBLE</td>
<td>1</td>
<td>1</td>
<td>9/13/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCT 204 : FUNDAMENTALS OF ACCOUNTING -- C.B-58</td>
<td>Edmonds, Thomas P.</td>
<td>Survey of accounting</td>
<td>330000010228067 WITHDRAWN</td>
<td>0</td>
<td>0</td>
<td>9/13/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 102 Taha...</td>
<td>Reserves Fraser, Lyn M.</td>
<td>Understanding financial statements /</td>
<td>330000010462332 AVAILBLE</td>
<td>7</td>
<td>7</td>
<td>12/1/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 102 Taha...</td>
<td>Reserves Mendez-Denton, Norma.</td>
<td>The anthropology of language : an introduction</td>
<td>3300000104613405 AVAILBLE</td>
<td>5</td>
<td>5</td>
<td>4/26/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 102 Taha...</td>
<td>Reserves Ottenheimer, Harriet.</td>
<td>Life is hard : machismo, danger, and the in</td>
<td>330000010528920 AVAILBLE</td>
<td>16</td>
<td>0</td>
<td>11/2/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves Lancaster, Roger N.</td>
<td>Lydia's open door : inside Mexico's most r</td>
<td>330000010461706 AVAILBLE</td>
<td>6</td>
<td>6</td>
<td>3/23/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves Kelly, Patti.</td>
<td>Life is hard : machismo, danger, and the i</td>
<td>330000010460625 AVAILBLE</td>
<td>17</td>
<td>9</td>
<td>11/3/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves Lancaster, Roger N.</td>
<td>Life is hard : machismo, danger, and the i</td>
<td>330000010460625 AVAILBLE</td>
<td>9</td>
<td>4</td>
<td>10/5/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves</td>
<td>Voices from exile : violence and survival</td>
<td>33000001046181 AVAILBLE</td>
<td>21</td>
<td>5</td>
<td>9/28/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves</td>
<td>Voices from exile : violence and survival</td>
<td>330000010460435 AVAILBLE</td>
<td>2</td>
<td>2</td>
<td>12/7/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves</td>
<td>Humanitarian aftershocks in Haiti /</td>
<td>330000010462822 AVAILBLE</td>
<td>2</td>
<td>2</td>
<td>12/7/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves</td>
<td>Humanitarian aftershocks in Haiti /</td>
<td>330000010462290 AVAILBLE</td>
<td>4</td>
<td>4</td>
<td>12/7/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 150 K McCaffrey...</td>
<td>Reserves Winkelman, Michael.</td>
<td>Culture and health : applying medical ant</td>
<td>330000010461391 AVAILBLE</td>
<td>4</td>
<td>4</td>
<td>10/17/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 414-01 Refugees -- McCaffrey...</td>
<td>Reserves Fadiman, Anne.</td>
<td>The spirit catches you and you fall down</td>
<td>330000010459510 AVAILBLE</td>
<td>3</td>
<td>2</td>
<td>1/24/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH 440 Gerber...</td>
<td>Reserves Wiley, Andrea S.,</td>
<td>Medical anthropology : a biocultural appr</td>
<td>330000010462522 AVAILBLE</td>
<td>11</td>
<td>11</td>
<td>3/21/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>APLN 342 Wel F17...</td>
<td>Reserves</td>
<td>Language and culture /</td>
<td>330000010875180 AVAILBLE</td>
<td>1</td>
<td>1</td>
<td>8/10/15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 102 Kent F17...</td>
<td>Reserves</td>
<td>The politics of design : a (not so) global m</td>
<td>330000010659101 AVAILBLE</td>
<td>0</td>
<td>0</td>
<td>9/13/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 200 RESEARCH METHODS IN ART HISTORY -- NBS-477</td>
<td>Office, Eric.</td>
<td>Art history and its methods : a critical ant</td>
<td>330000010816935 AVAILBLE</td>
<td>10</td>
<td>7</td>
<td>2/17/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 200 RESEARCH METHODS IN ART HISTORY -- ND13215</td>
<td>Seidel, Linda.</td>
<td>Jan Van Eyck's Arnolfini portrait : stories c</td>
<td>330000010813369 AVAILBLE</td>
<td>3</td>
<td>3</td>
<td>3/12/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 200 RESEARCH METHODS IN ART HISTORY -- ND5583.4</td>
<td>Collins, Bradford R.</td>
<td>12 Views of Manet's Bar /</td>
<td>330000010952672 AVAILBLE</td>
<td>13</td>
<td>7</td>
<td>4/10/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 200 Schulor.</td>
<td>Reserves</td>
<td>The methodologies of art : an introduction</td>
<td>330000010825564 AVAILBLE</td>
<td>5</td>
<td>5</td>
<td>2/12/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 340 Hamilton F17...</td>
<td>Reserves Neuman, Robert.</td>
<td>Baroque and Rococo Art and Architecture</td>
<td>330000010508100 AVAILBLE</td>
<td>4</td>
<td>2</td>
<td>1/26/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 350 C Hamilton...</td>
<td>Reserves Chu, Petra ten-Doesschate.</td>
<td>Nineteenth-century European art /</td>
<td>330000010936824 AVAILBLE</td>
<td>10</td>
<td>0</td>
<td>11/17/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTH 601 Kent Fall F17...</td>
<td>Reserves Stiles, Kristine.</td>
<td>Theories and documents of contemporar</td>
<td>330000010412493 AVAILBLE</td>
<td>0</td>
<td>0</td>
<td>9/13/16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHAD 410 Robinson...</td>
<td>Reserves</td>
<td>Understanding child abuse and neglect /</td>
<td>330000010461144 AVAILBLE</td>
<td>3</td>
<td>3</td>
<td>2/28/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 100 : INTRODUCTORY CHEMISTRY...</td>
<td>Tro, Nivaldo J.</td>
<td>Chemistry in focus : a molecular view of c</td>
<td>330000010447952 AVAILBLE</td>
<td>12</td>
<td>5</td>
<td>5/4/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 100 : INTRODUCTORY CHEMISTRY...</td>
<td>Tro, Nivaldo J.</td>
<td>Chemistry in focus : a molecular view of c</td>
<td>330000010448067 AVAILBLE</td>
<td>7</td>
<td>1</td>
<td>2/28/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 100 : INTRODUCTORY CHEMISTRY...</td>
<td>Tro, Nivaldo J.</td>
<td>Chemistry in focus : a molecular view of c</td>
<td>330000010448059 AVAILBLE</td>
<td>13</td>
<td>1</td>
<td>2/28/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 100 : INTRODUCTORY CHEMISTRY...</td>
<td>Tro, Nivaldo J.</td>
<td>Chemistry in focus : a molecular view of c</td>
<td>330000010448117 AVAILBLE</td>
<td>7</td>
<td>4</td>
<td>4/21/17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CMDA 210...</td>
<td>Reserves Ott, Brian L.</td>
<td>Critical Media Studies : an introduction /</td>
<td>330000010462001 AVAILBLE</td>
<td>9</td>
<td>5</td>
<td>5/23/17</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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/s11ksa90hnnv6g/

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 *

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:
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 * Nathan Schwartz
Title * Systems Librarian
Email * nnschwartz@seu.edu
Institution Name * Southeastern University
OCLC Symbol * FYQ
Migration * Both

Would you like additional resources to help you 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.
Wrap-up