



# **Staff User's Guide – Course Reading and Reserves**

Version 22

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# Table of Contents

<b>1</b>	<b>COURSE READING AND RESERVES OVERVIEW .....</b>	<b>5</b>
1.1	Course Records .....	5
1.2	Reading List Records (Bibliographic Records) .....	7
1.2.1	Bibliographic Records.....	7
1.2.2	Connection Records .....	7
1.3	Item Records .....	8
1.4	Course Reading OPAC .....	8
<b>2</b>	<b>GETTING STARTED.....</b>	<b>9</b>
2.1	GUI Environment.....	9
2.2	Staff Permissions .....	10
<b>3</b>	<b>ADD/MODIFY/DELETE COURSES.....</b>	<b>11</b>
3.1	List of Courses .....	12
3.2	Course Form.....	13
<b>4</b>	<b>READING LIST – UPPER PANE .....</b>	<b>15</b>
4.1	Adding a Bibliographic Record by Searching .....	17
4.2	Catalog New.....	19
4.2.1	Bibliographic Record .....	21
4.2.2	Item Record.....	21
4.2.3	Links and Course Notes .....	21
	ITM link.....	21
	URL Link.....	22
	Notes .....	22
4.3	Load File .....	22
4.4	Edit Notes.....	23
4.5	Copyright .....	23
4.6	To Common/From Common.....	24
4.7	Suppress/Unsuppress .....	26
4.8	Push to Cataloging .....	26
4.9	Removing a Document from a Course.....	26

<b>5</b>	<b>READING LIST – LOWER PANE .....</b>	<b>27</b>
5.1	Tab 1: Bib Info.....	27
5.2	Tab 2: Items .....	28
5.2.1	Reserve Reading Picklist.....	28
5.2.2	Circ Items.....	29
5.2.3	Cat Items .....	29
5.3	Tab 3: Other Courses Link.....	30
<b>6</b>	<b>ITEMS – ADDING AND UPDATING .....</b>	<b>30</b>
6.1.1	Adding Items to Cataloged Records.....	30
6.1.2	Full Circulation Information and Actions .....	30
6.1.3	Changing Item Information .....	31
<b>7</b>	<b>SEARCHING IN THE WEB OPAC.....</b>	<b>32</b>
<b>8</b>	<b>COURSE READING SERVICES.....</b>	<b>33</b>
8.1	Course Reading Lists Report (course-01).....	33
8.2	Pickup List (course-02).....	33
8.3	Remove Items from Reserve Collection (course-03).....	34
8.4	Course Reading Records that Are Not Linked to a Course (course-04).....	34
8.5	Course Not Active Report (course-05) .....	34
8.6	Course Summary Report (course-06) .....	34

# 1 Course Reading and Reserves Overview

The purpose of the Course Reading and Reserves management is to provide information to the student about required and optional reading material suggested by an instructor for a course of studies and to provide efficient tools for moving material into and out of a reserves collection.

The Course Reading and Reserves functions provide tools for managing the creation and update of Courses and Course Reading Lists and the management of the Course Reserves Collection. The following options are available:

- Create/Modify course information.
- Assign bibliographic records and items (copies) to a course. (This is the Course Reading List.)
- Place Request on items (for Recall and Pickup Lists) in order to change/move to Reserves Collection.
- Print Pickup Lists for Reserves Collection.
- Transfer items (using the barcode) to the Reserves Collection.
- Remove items (using the barcode) from Reserves Collection.
- Print the Course List report (Course + Titles + Items).
- Print cleanup reports.

The Course Reading and Reserves operations are managed in the Administration tab of the Circulation GUI client.

The building blocks of the Course Reading functionality are Course records and bibliographic records. The item records linked to a bibliographic record also come into play.

Course Reading management and the Course Reading library function in parallel to a single Administrative library. In a multi-ADM consortium setup, each ADM library will have its own separate Course Reading library.

## 1.1 Course Records

A course is identified for the operator by the course number. In cases where the course number is not unique, additional information, such as instructor or course dates, is required in order that the operator be able to identify the course.

In order to enable assigning the same course number to multiple courses, the internal system identifier of a course is made up of the course number to which a system-generated sequence number is appended. The sequence number serves to differentiate between different courses that use the same course number, such as multiple sessions of a course.

There are two types of Course Records:

- “common” course record

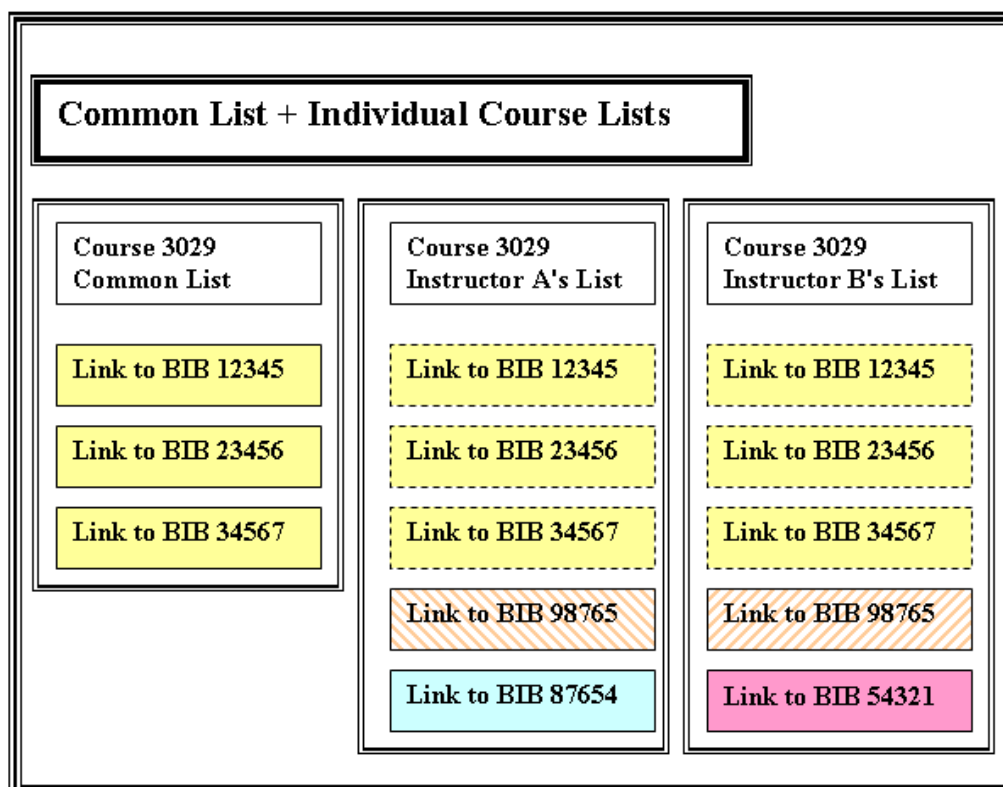
This type of course is optional. It is suitable for use for courses that are taught in multiple sessions, and there is a common corpus of reading material that is used in common in all the sessions of a course. It provides efficient management of reading lists by enabling one-time registration of reading material for all the sessions of a course. Although the material is listed only once, it is included in search and display for all sessions of the course. The common course record does not have instructor or active dates. In addition to material registered to a common list, additional reading material can be added to a specific session of the course.

- “individual” course record

This is the actual classroom course, and must have instructor, active dates and relevant period. An individual course is linked to a common course by virtue of the fact that they have the same course number. Since most courses at a college/university are taught in a single session only, most individual course records will not be linked to a common course.

If an individual course is linked to a common course, the reading list for the course includes both the individual course’s reading list and all the common course’s reading list, displayed in one sequence. Entries from the common course are displayed and indexed for each of its individual courses. The individual course can have additional entries of its own.

When a course does not have the same course number as a "common" course, it will have only the reading list entries that have been registered for it.



In the diagram above the three yellow items that are registered in the common list are also displayed in the individual lists. If one of these items is removed, it will be

removed from all lists. Bibliographic record 98765 is registered in both List A and B, but each listing is independent, and removing it from one list will not remove it from the other list.

## **1.2 Reading List Records (Bibliographic Records)**

There are two types of BIB records in the Course Reading database: bibliographic records and connection records.

### **1.2.1 Bibliographic Records**

Bibliographic records describe a work, such as a book, a journal article, or a chapter of a book. The bibliographic records for the Course Reading and Reserves Collection can be cataloged in the library's main database or in the Course Reading database if the institution prefers not to put bibliographic records created specially for course reading (e.g. journal articles, book chapters) in the library database.

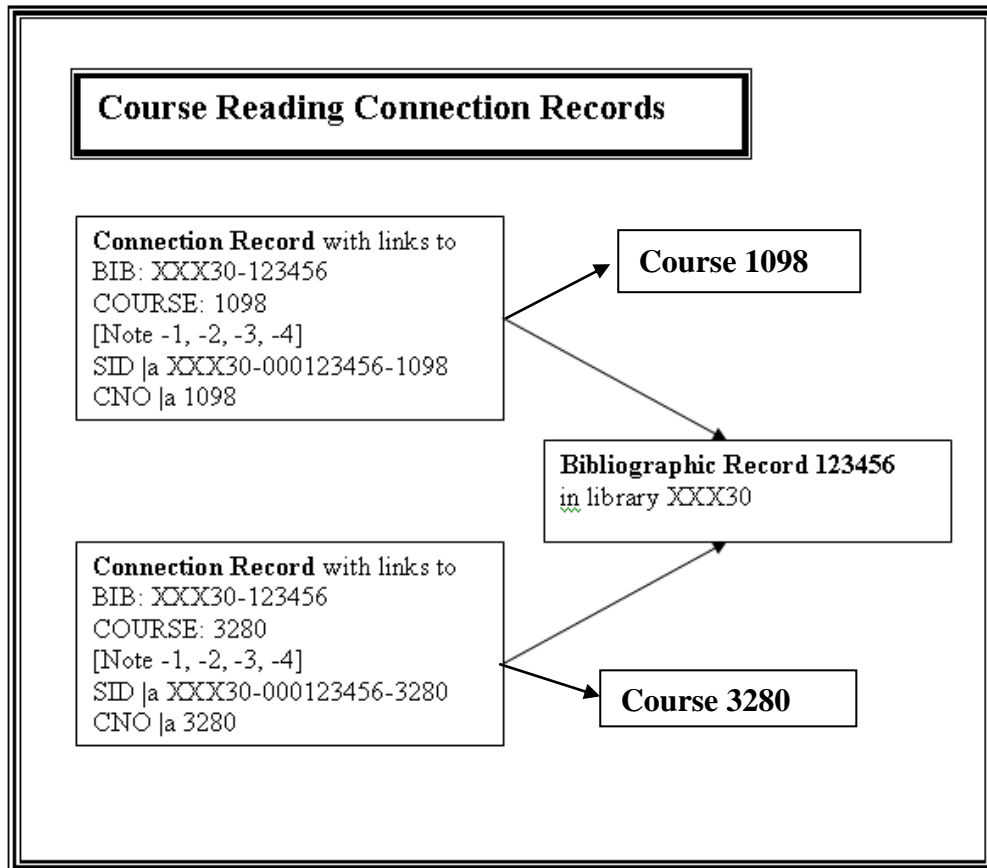
Bibliographic records can be created in the Course Reading database through the regular Cataloging client or cataloged on-the-fly using a simple cataloging form (see [Section 4.2 Catalog New](#) of this document).

### **1.2.2 Connection Records**

These are special records, in BIB format, that link the bibliographic record and the course record to form the reading list. This type of BIB record (a connection BIB) is an internal ALEPH structure and is created only through Course Reading functions, not through cataloging functions. Bibliographic records should never contain course links.

Connection records are created when a bibliographic record is added to a Course Reading list through search (for a pre-existing record), or cataloged on-the-fly. Another way in which connections can be created is through file loading. Authorized patrons are able to create suggested reading lists through the "Save/Mail" action on "My e-Shelf" in the library's OPAC. The action results in an e-mail message sent to the Course Reading manager and a list of titles saved on the server. This list can efficiently be added to a course through the file load action in the Course Reading GUI.

The connection records are held in the Course Reading Library. In the ALEPH demo setup, this is the USM30 library, connected to the USM50 library.



The above diagram illustrates two connection BIBs, each with a link to a different course and each with a link to the same bibliographic record.

### 1.3 Item Records

Item records for the Course Reading and Reserves Collection are held in the ADM (XXX50) administrative library and are linked to the relevant bibliographic record, in the regular library (XXX01) or the course reading library (XXX30).

Hold requests can be placed on items in order to facilitate creation and printing of picklists prior to the onset of a course. A valid patron record must be created for this purpose. It is suggested that a separate patron be created for each Course Reading service unit.

### 1.4 Course Reading OPAC

The Course Reading online catalog includes special controls for permission to view electronic resources. It is possible to limit viewing permission to patrons registered in the course to which the resource is linked.

The Union View mechanism is applied to the Course Reading database, so that titles that are listed for more than one course will be virtually merged into a single record for view in the OPAC.



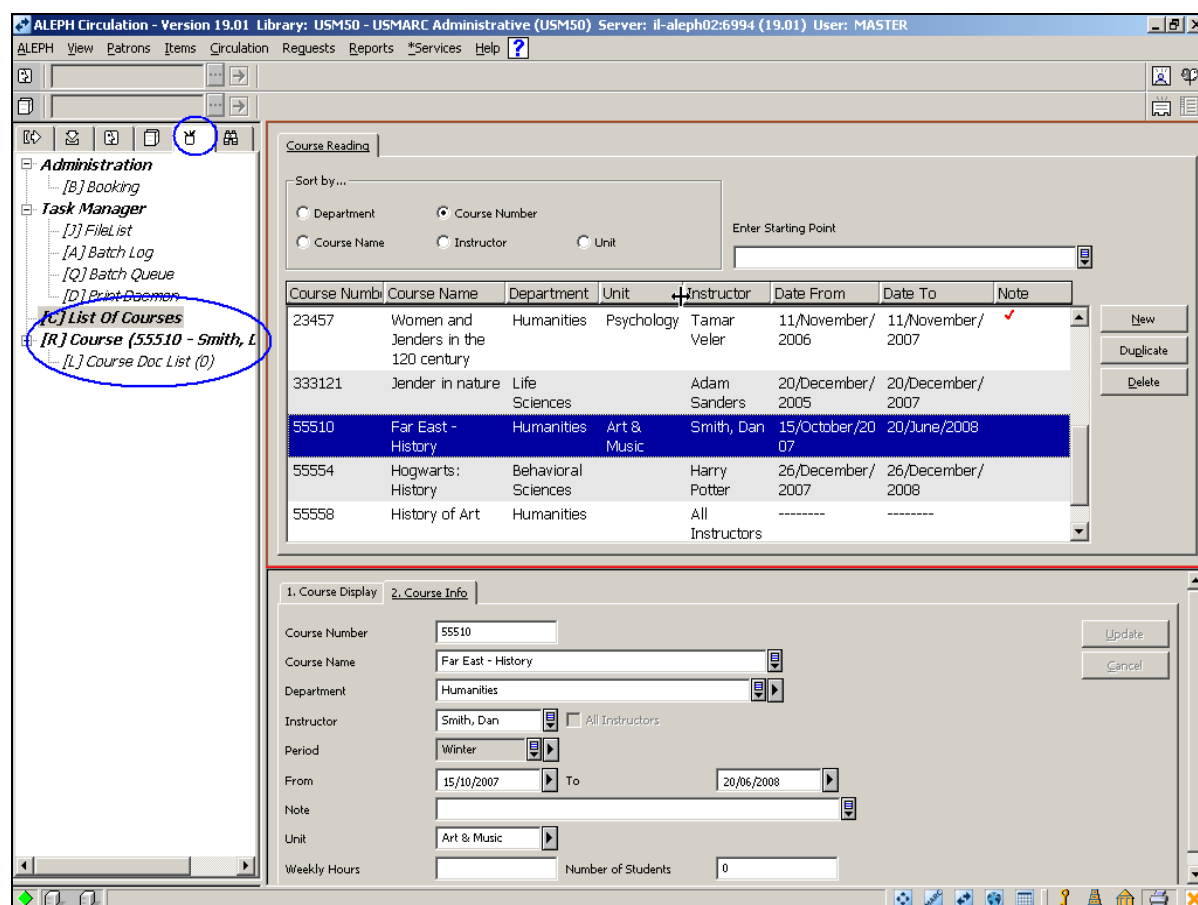
## 2 Getting Started

### 2.1 GUI Environment

The Course Reading interface is contained within the Administration tab of the Circulation GUI client.

You can set your Circulation GUI to default to the Course node in the Administration tab. This is done the following setting in the GUI client's Circ\tab\circ.ini file.

```
[CircAdminTree]
DefaultTree=C
```



When the List of Courses node in the left-hand navigation pane is selected, the upper pane displays the courses that have been entered in the system. Selecting a single course in the upper pane and choosing the Course Doc List node changes the displayed list to the list of the titles that have been linked to the course. Authorized staff can add, update or delete courses, and add, suppress or delete titles for a course reading list.

## 2.2 Staff Permissions

There are no permission checks for view course list, view course display, view course info., view doc list, view bib info, view item list, view attached courses, “push to” (Cataloging, Circ Items, Cat Items).

Following are the permissions that should be assigned to Course Reading staff. Note that all the permissions are assigned in the ADM library except for permissions for functions and services in the Cataloging module, which are assigned in the Course Reading library.

- Course Reading
  - All Unspecified Subfunctions

Or a selection from the following permissions:

  - New/Update Course
  - Delete Course
  - Add title to Reading List (for Search and Load File)
  - Catalog new title and add to list
  - Edit notes, Manage Copyright
  - Move from/to common/individual list, Suppress, Remove title
  - Reserve item for course

- Services
  - Common – Services Menu Interface
  - Circulation – Course Reading Services
- Items
  - Circulation – Items Management
    - Change item information (Main Menu-Items-Change Item)
    - Restore item information (Main Menu-Items-Restore Item)
    - Retrieve Item List

Circulation Requests permissions will be required if the user should be able to update Hold requests in the Circulation client.

  - Items – Items Control
    - Filter items list (to display Items in Circulation client)
    - Display items list (to display Items in Cataloging client)
    - Display item (to display Items in Cataloging client)

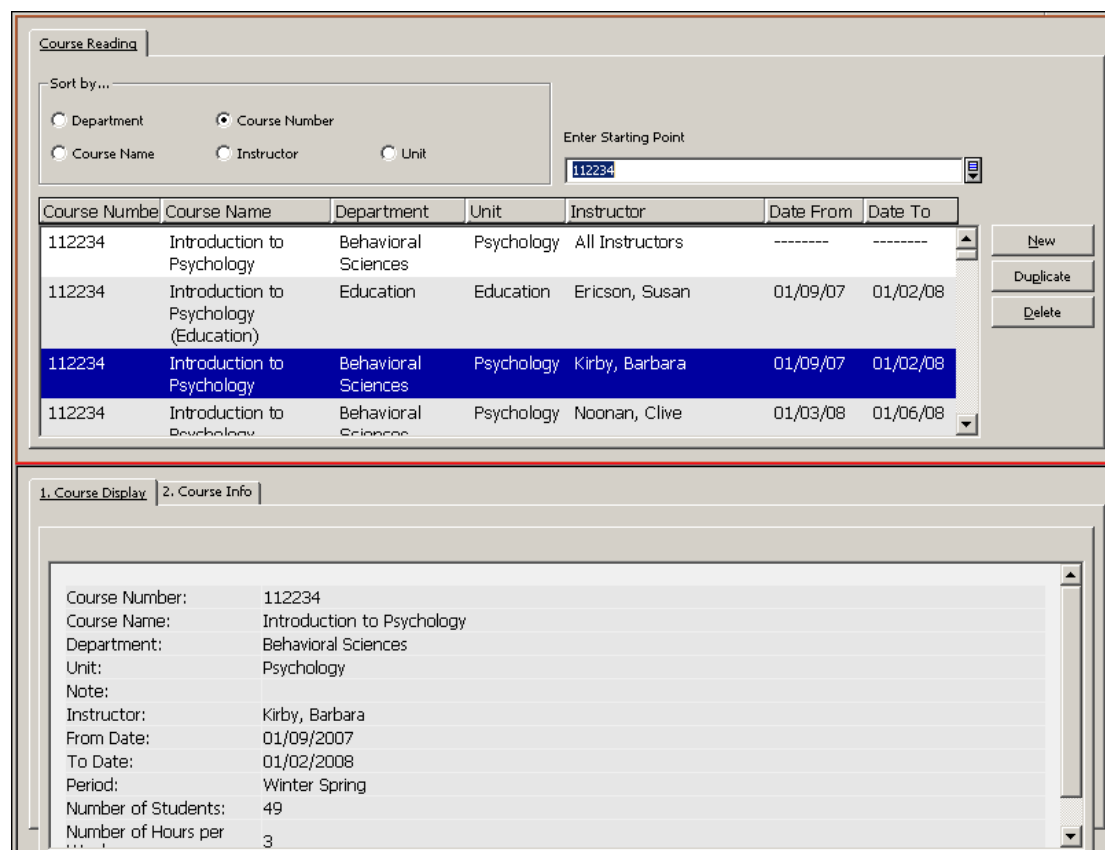
Additional Items Control permissions will be required if the user should be able to update items in the Cataloging client.
- Objects
  - Object Control
    - All unspecified subfunctions
  - Object Services
    - All unspecified subfunctions

Some staff members might also be assigned permissions for the Cataloging module in the XXX30 library, and Patrons in the USR library:

- Cataloging
  - Cataloging – Cataloging Record
  - Cataloging – Indexing Services (senior staff only)
    - MANAGE-01
    - MANAGE-02
    - MANAGE-05
    - MANAGE-07
  - Cataloging – Union Catalog Services (senior staff only)
    - UNION-01
    - UNION-02
    - UNION-04
- Patrons (USR library)
  - Patrons, Global (senior staff only; this permission is required only for creating the “Course Reading Patron” for placing requests)
    - All unspecified subfunctions

### 3 Add/Modify/Delete Courses

Choosing the Courses node in the left pane of the Circulation Administration tab displays the **List of Courses** window, in which the List of Courses displays in the upper pane, and the lower pane contains two tabs, for display of full Course information, and the course input form.



### 3.1 List of Courses

The list of courses that displays in the upper pane is sorted according the selected radio button. Upon selection of a different radio button, the list is resorted. Entering text in the Start Point box displays the sorted list from the matching entry.

To search for a course, enter "starting text" and choose the relevant radio button to sort the list by:

- Course number (internal sort is by instructor)
- Course name (internal sort is by instructor)
- Instructor (internal sort is by course number)
- Department (internal sort is by course number)
- Unit (internal sort is by course number)

For each course in the List of Courses, the display includes the above details plus the course's date from/date to, the period(s), and an indication if the course has a note.

As explained in Section [1.1 Course Records](#), a common course record can be used for registering reading material that is used in common by all the sessions of a course that is taught in multiple sessions. The common course record does not include instructor or dates. In the list of courses display; therefore, in place of the instructor name, a locally configured text, such as "All Instructors" displays, and dashes display in the dates columns.

There are three action buttons on the upper pane of the List of Courses:

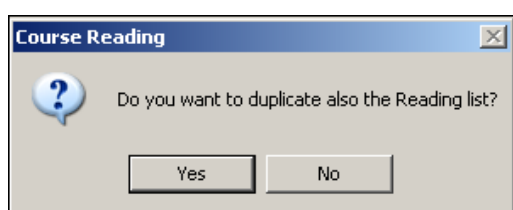
- New Course
- Duplicate Course
- Delete Course

Click **New** to display a blank form in the lower pane and then fill in the course form's information fields. The Course form includes a checkbox to indicate that this course functions as a common course and lists the documents under this course that will be used by all sessions of this course. When the checkbox is checked, it is not possible to enter instructor and time periods. When the box is unchecked, these fields are mandatory.

After a course has been set as being "common" or "individual", the setting cannot be changed.

The course record is updated by clicking **Update** in the lower pane.

Click **Duplicate** to copy the Course Information to the form in the lower pane. The fields can be overwritten as needed. The duplicate action can save keying effort. Click **Update** to create the new course record. A prompt pops up asking whether to also duplicate the reading material registered in the Course Doc List of the original course.



If the new course is related to a common course (by sharing the same course number) the course will automatically inherit the reading material registered to the common course, and it is not necessary to duplicate the reading list.

The duplicate action fails if the course record is marked as a common course, and the same common course already exists.

Click **Delete** to delete the course; this deletes the course and its reading list. A pop-up message is displayed and must be acknowledged in order to confirm that the course and its content will be deleted. Note that deletion of a common course is blocked if the common course has linked readings. In order to delete a common course, its content should be removed first.

The bibliographic records remain in the database, but the reading list connection records are deleted.

### 3.2 Course Form

The lower pane displays the full information of the course that was selected in the upper pane or an empty form if New was activated. There are two tabs. One tab displays the information in HTML format, for display only. The second tab displays the information in a form, for update. Any of the fields (except the All Instructors checkbox) can be updated.

The screenshot shows a software interface for managing course readings. The top section, titled "Course Reading", contains a "Sort by..." menu with radio buttons for "Department", "Course Number", "Course Name", "Instructor", and "Unit". A text field labeled "Enter Starting Point" contains the value "112234". Below this is a table listing courses with columns for Course Number, Course Name, Department, Unit, Instructor, Date From, Date To, and Note. The second row is selected, showing course 112234, "Math for Beginners", Exact Sciences, Math & Physics, Ayelet Lyn, 20/October/2007, 12/June/2008, and a checkmark in the Note column. To the right of the table are buttons for "New", "Duplicate", and "Delete".

Course Num	Course Name	Department	Unit	Instructor	Date From	Date To	Note
112234	Math for Beginners	Exact Sciences	Math & Physics	All Instructors	-----	-----	
112234	Math for Beginners	Exact Sciences	Math & Physics	Ayelet Lyn	20/October/2007	12/June/2008	✓
112234	Math for Beginners	Exact Sciences	Math & Physics	Tamar Rozental	20/October/2007	12/June/2008	
112344	Math for Beginners	Exact Sciences	Life Sciences	Yael Sason	20/October/2007	12/June/2008	
23455	Women and Jenders in the 120 century	Humanities	Psychology	Tamar Veler	11/November/2006	11/November/2007	✓

The bottom section, titled "1. Course Display" and "2. Course Info", shows a form for editing the selected course. Fields include: Course Number (112234), Course Name (Math for Beginners), Department (Exact Sciences), Instructor (Ayelet Lyn) with an "All Instructors" checkbox, Period (Winter), From (20/10/2007) and To (12/06/2008) dates, Note (in MATH building), Unit (Math & Physics), Weekly Hours (22), and Number of Students (11). "Update" and "Cancel" buttons are on the right.

The Course fields are:

- **COURSE-NUMBER** – Text (upper case), including blanks. This is the course number as it appears in the University syllabus; it does not have to be unique, and it can be changed.
- **COURSE-NAME** – As registered in the University syllabus; records can have the same course number and different names.
- **DEPARTMENT** – The academic department in which the course is taught.
- **INSTRUCTOR** – The instructor for the specific class.
- **ALL INSTRUCTORS** – A check in this box indicates that this is a common course that functions as the anchor for a reading list that is used in common by multiple sessions of the same course. Each session is entered in the system as a separate course, linked to this course by having the same course number. An individual course automatically inherits the common reading list and additional course-specific titles can be added. When a course is marked for "all instructors" the Instructor, Date From/To and Period fields are grayed out, since they are irrelevant. The checkmark cannot be changed. In order to unlink the common course reading list from the individual courses, the titles in the list must be "moved". This is done on the reading list, and explained in section 4.6 following.
- **PERIOD** – The semesters (or periods) during which the course is active (e.g. first semester, summer session). This can serve as a basis for creating logical bases for the Course Reading public interface.
- **DATE FROM / DATE TO** – The active dates of the course. You can request a report ("Report of Course Reading Records that are Linked to an Inactive Course") of the items that should be removed from the Reserves Collection on the basis of these dates. The dates are used by the system in order to determine the active dates for an item request placed in the Course Reading module.
- **NOTE** – Free-text note for a specific course (for information only). If the Course has a note, a checkmark displays in the Note column in the List of Courses display. The course note text is also displayed at the bottom of the Course Reading List.
- **UNIT** – Optional. The administrative unit in the library that handles the course and its materials.
- **WEEKLY-HOURS** – Optional. The number of hours of instruction per week (for information only).
- **NO-STUDENTS** – Optional. Number of students in the course (for information only).

The action buttons are:

- **Add/Update** – Saves the course information entered or modified.

- **Save Defaults** – Saves field values and copies them to each new course form that you open.
- **Cancel** – Cancels any changes made in the course information fields and returns focus to upper pane List of Courses.

## 4 Reading List – Upper pane

The Course reading list is managed by highlighting the course in the List of Courses and selecting the Course Doc List node in the left pane.

The screenshot shows the 'Course Reading' interface. On the left is a navigation pane with a tree view containing 'Administration', 'Task Manager', 'List Of Courses', and 'Course (112344 - Yael S.)'. The 'Course Doc List (0)' node is highlighted. The main area is divided into two panes: '1. Course Display' and '2. Course Info'.

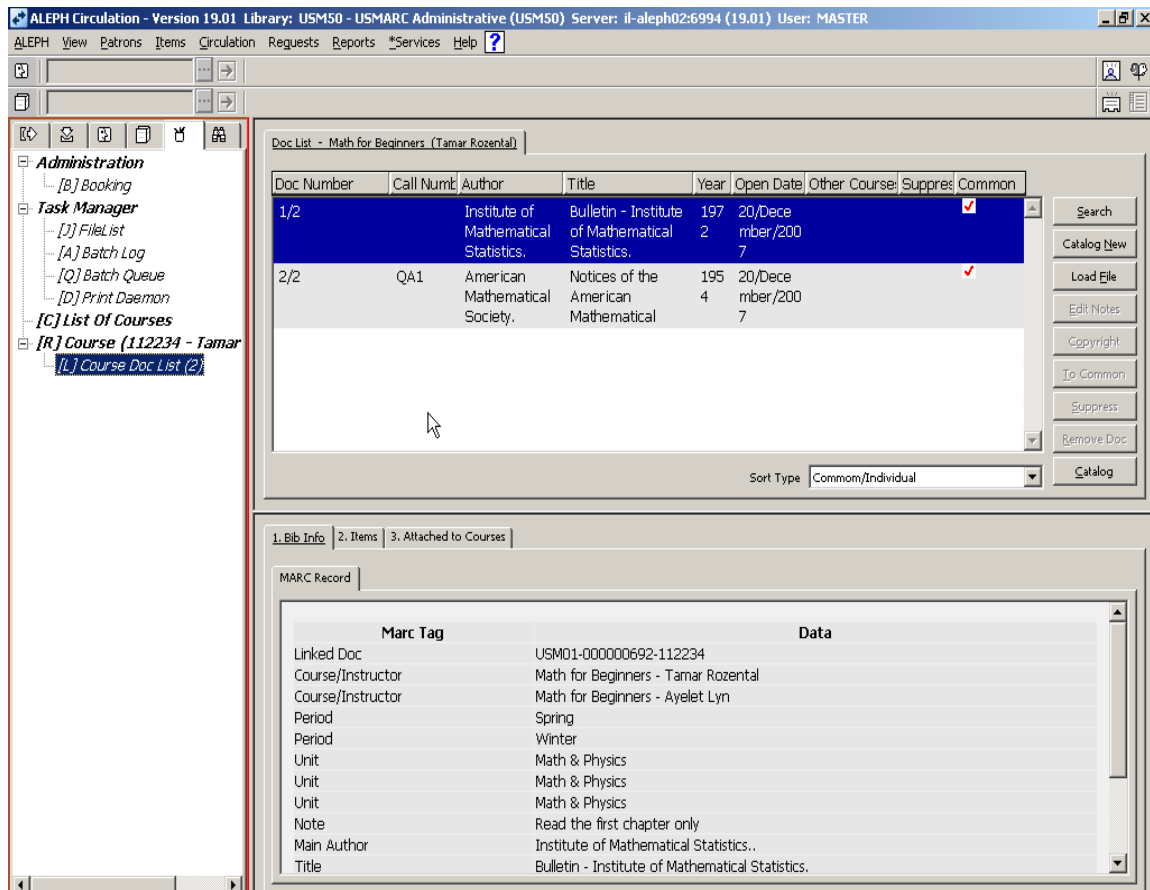
The '1. Course Display' pane shows a table of course records:

Course Numbr	Course Name	Department	Unit	Instructor	Date From	Date To	Note
112234	Math for Beginners	Exact Sciences	Math & Physics	All Instructors	-----	-----	
112234	Math for Beginners	Exact Sciences	Math & Physics	Ayelet Lyn 07	20/October/20	12/June/2008	✓
112234	Math for Beginners	Exact Sciences	Math & Physics	Tamar Rozental 07	20/October/20	12/June/2008	
112344	Math for Beginners	Exact Sciences	Life Sciences	Yael Sason 07	20/October/20	12/June/2008	
23455	Women and Jenders in the 120 century	Humanities	Psychology	Tamar Veler	11/November/2006	11/November/2007	✓

The '2. Course Info' pane shows details for course 112344:

- Course Number: 112344
- Course Name: Math for Beginners
- Department: Exact Sciences
- Instructor: Yael Sason (with 'All Instructors' checkbox)
- Period: Winter
- From: 20/10/2007 To: 12/06/2008
- Note: (empty field)
- Unit: Life Sciences
- Weekly Hours: (empty field) Number of Students: 0

Highlighting the Course Doc List node in the left-hand navigation pane displays the list of records that are registered for the course.



The upper pane of the Course Doc List includes the Course Name (on the tab), a list of the documents that have been registered for the course, and a dropdown list of sort options. The list can be sorted, for example, by title or by the date added to the list, and you can select the sort sequence from a dropdown list of sort options. All documents of the course are listed in one sequence, whether they are linked only to the particular course or are "inherited" from a common list.

The display for each title can include the following information:

- Short bibliographic information (fields from the Z13 short-doc record)
- Indication that the title has been inherited from a list that is common to all the instructors of the course
- Indication that the bibliographic record is linked to an additional course
- Indication that the bibliographic record is cataloged in the course reading database (and not in the "main" catalog)
- Indication that the record is currently in suppress status for this course

The lower pane has three tabs, one for displaying full bibliographic details, the second for displaying linked items, and the third for displaying a list of additional courses to which the bibliographic record is linked.

When removing a document record that is linked to other courses as well, it will be unlinked from the specific course, but the links for other courses will remain.

The action buttons on the upper pane (bibliographic records) are:



- **Search** – Displays a form for initiating a search for an existing bibliographic record, so that it can be added to the reading list
- **Catalog New** – Displays an input form for “quick cataloging”
- **Load file** – Displays a form for loading a file of saved records
- **Edit notes** – Displays the notes fields form for corrections or additions
- **Copyright** – Displays the copyright form
- **Move to common list/Move to individual lists** – The function of this button depends on whether this is an individual list or a list that is common to all the instructors of the course
- **Suppress/Unsuppress** – Adds or removes a "suppress" flag on the record
- **Remove Doc.** – Removes a record from the reading list
- **Catalog** – Displays the selected record in draft view in the GUI Cataloging client

Documents that are registered in a common "All Instructors" list, can be updated in Course Reading (Edit notes, Copyright, Suppress, Unsuppress) or removed only if the list has been accessed from the common Course.

The lower pane has three tabs:

- **Bib Info** – Displays the bibliographic information, including course details. If the record is listed in the "All Instructors" list, it includes details of all the courses that are linked to the common course
- **Items** – Displays a list of the items linked to the bibliographic record
- **Attached to Courses** – Displays additional courses that are linked to the same bibliographic record

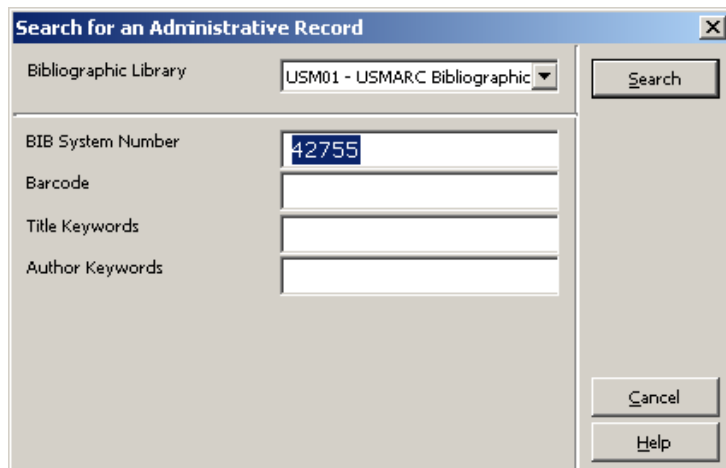
On the Items tab there are three action buttons:

- **Hold Request** – creates a hold request for the selected items; a Hold Request cannot be created on the "All Instructors" list.
- **Circ. Items** – displays the items list in the CIRC GUI Items tab.
- **Cat. Items** – displays the items list in the CAT GUI Items tab.

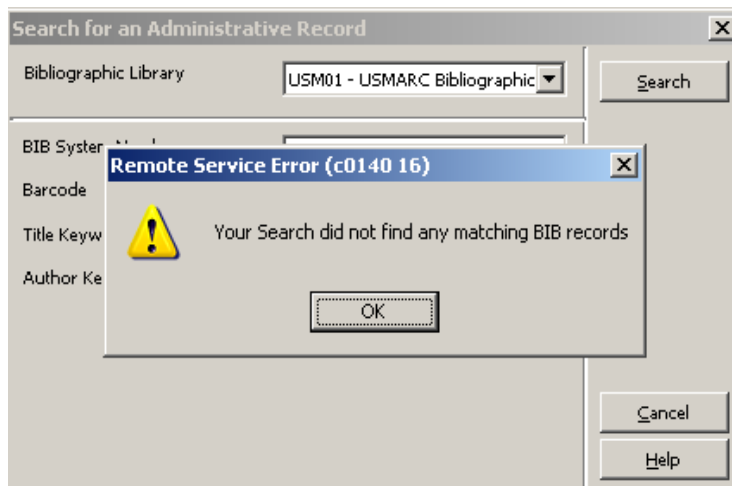
On the Courses tab, click the action button **Course** to jump to the Course record highlighted on the list of courses.

## 4.1 Adding a Bibliographic Record by Searching

Click **Search** to open a window in which you can enter search parameters. Up to eight direct or word indexes have been defined for you by your system librarian. It is possible to search in the "main" library (XXX01) or the Course Reading XXX30 library.



If no records are found, a message pops up.



If records are found, the set is displayed in a Brief List, as illustrated below.

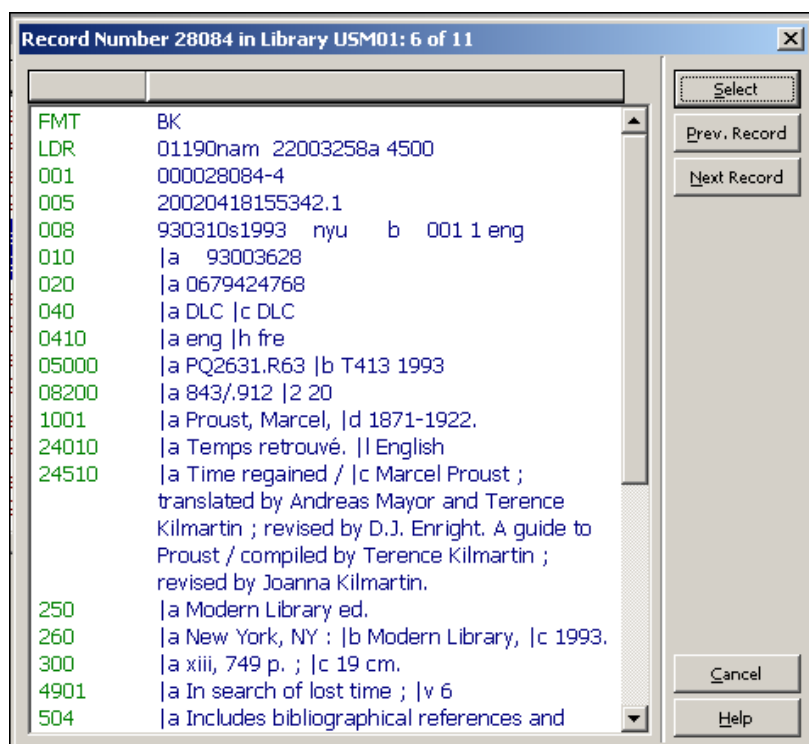


The action buttons are:

- **Select** – Highlight a line and click the “Select” button to choose a single record from the List. The window will close, and the Reading List will display

with the chosen record in focus in the upper pane and the items displayed in the lower pane.

- **View Full** – Click **View Full** to display the selected record in full.



Click **Prev.Record** and **Next Record** to browse back and forth in the full record display.

Click **Select** to choose the record.

The window will close and the Reading List will display with the chosen record in focus in the upper pane, and the items displayed in the lower pane.

You can set your Circulation GUI to automatically display the “Edit Notes” form after choosing a record.

This can be set by setting the following GUI client’s Circ\\*tab\\*circ.ini file

```
[CourseReading]  
DisplayNotesDialog=Y
```

Click **Cancel** to close all search windows.

## 4.2 Catalog New

Click **Catalog New** to display the quick cataloging forms, which are used to catalog a new bibliographic record in the Course Reserve library. A form with three tabs displays for entering bibliographic information, item information, 856 field information, copyright, and notes information. Each tab is explained in the following subsections.

**Catalog Record and Create Item**

1. Document Information      2. Item Information      3. Links + Course Notes

Call number	090	a		OK
Personal Author	1001	a		
Corporate Author	110 2	a		
Title (mandatory)	245	a		
Edition	250	a		
Place of publication	260	a		
Publisher	260	b		
Date of publication	260	c		
Pages	300	a		

Cancel      Help

**Catalog Record and Create Item**

1. Document Information      2. Item Information      3. Links + Course Notes

Open Date:	25/12/07	Sequence Number:	000000	OK
Item Barcode:		Material Type:	BOOK	Save Def.
Sublibrary:	LAW	Collection:		
Item Status:	1	Item Process Status:		
Call Number Type:		Call Number:		
2nd Call Number Type:		Second Call Number:		
Description:				
OPAC Note:				
Internal Note:				
Circulation Note:				
Copy Number:				

Cancel      Help

The screenshot shows a software window titled "Catalog Record and Create Item" with three tabs: "1. Document Information", "2. Item Information", and "3. Links + Course Notes". The "ITM Link" section includes input fields for ADM SysNo, Year, Volume, Part, Issue, and Pages. The "URL Link" section includes input fields for URL, Copyright, Provider, Fee Type, and Cost. There are four text areas labeled Note 1 through Note 4. On the right side, there are buttons for "OK", "Cancel", and "Help".

Fill in the relevant fields and click **OK**. The Reading List redisplay with the new record in focus. It will not immediately be in its proper sequence, since indexing is done in the background.

#### 4.2.1 Bibliographic Record

The bibliographic record fields have been set by your system librarian, and the number of fields is limited. If the form does not suffice (additional bibliographic fields are required) click **Catalog** on the List of Docs. This opens the record in CAT DRAFT form in the Cataloging GUI.

#### 4.2.2 Item Record

If item information was entered, an ADM record + an item will be created in addition to the BIB record.

Click **Save Def.** to save the values of the items fields. The next time the form displays, the item form will have these default values filled in. Only one item can be created using "Quick Catalog". If you need to add more copies, click **Cat. Items** in the lower pane. This opens the record in CAT ITEMS in the Cataloging GUI. Toggle from Items back to Circulation to get back to the Reading list window display.

#### 4.2.3 Links and Course Notes

##### ITM link

Use the ITM link if the item already exists, and you should not create an additional item. For example, you might be cataloging part of a work that is cataloged in the main library catalog (this would be like an analytical cataloging), and you want to link to an already existing item. If the item is part of a multi-volume set, you should add additional link information, such as volume number. If the item is a single journal issue, add year, volume, and issue information. When the item is displayed in the

Course Reading catalog, the year/volume/issue data ensures that only the relevant item will display.

### URL Link

If the item is electronic and can be accessed through its URL, enter the URL address. This section includes optional fields for copyright information. Refer to [Section 4.5 Copyright](#) for information on these fields.

### Notes

Up to four notes can be entered. These notes pertain to the record within the context of the course. Refer to [Section 4.4 Edit Notes](#) for information on these fields.

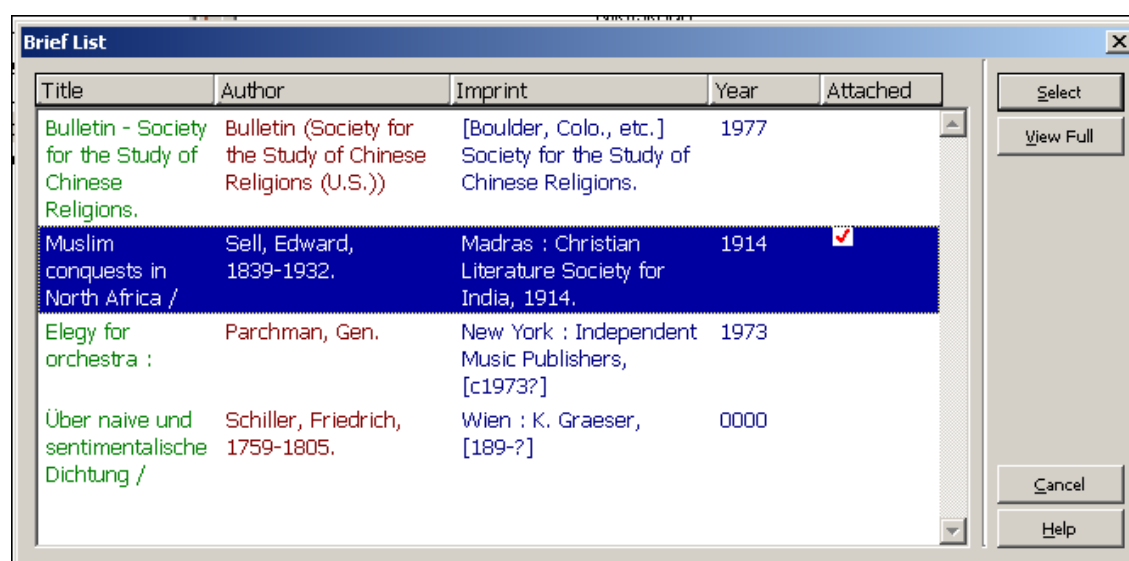
## 4.3 Load File

Bibliographic records can be added to a course using the “Load File” process. These are records that have been saved in a list on the server.

There are two ways in which a file of bibliographic records intended for load can be created and saved on the server:

- In the WEB OPAC, an authorized user (a user who has “Course Permission” in his/her profile) sends a set of records from the Web OPAC to the Course Reading Administration. This is performed through My e-Shelf and Save/Mail by sending an e-mail to the Course Reading Administration that a file with name *abc* should be added to Course *yyy*.
- In GUI Search, a staff member performs “Save on server” for a set of records. This action does not include the e-mail functionality that accompanies the Web OPAC action.

Click **Load** to display the window for entering the file name. After the file name is entered, the records display in a brief list with bibliographic information in columns, a column indicating whether the record is already present in the Reading List, and the Note that was entered in the Web OPAC e-Shelf function.



Records that are already listed in the Reading List are marked in the “Attached” column in the list and are not loaded. If the record being loaded has a note and the record is already in the Reading List, the note in the load file will overwrite the first note in the existing record, and remaining notes will be removed. If the record being loaded does not have a note, the notes already present will remain as they are.

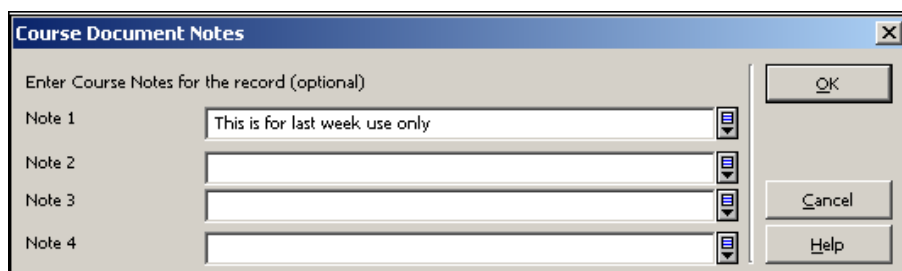
Possible actions are:

- Selection of single or multiple lines to add the document(s) to the Course Reading List.
- Display the Full View of a record; it is possible to move forward and back through the list of records in Full View and to select a record from the Full View.

After selecting the records that should be added, the Reading List redisplay, with the relevant records added. The records will not immediately be in proper sequence, since indexing is done in the background.

## 4.4 Edit Notes

To add or update notes relevant to the title for the particular course, click **Edit Notes**. This displays a form for creating/updating the four note fields that can be added to the course reading record. The notes are not added to the bibliographic record; they are added to the connection record and are course-specific. If the bibliographic record is included in a common list, the notes are used in common.



## 4.5 Copyright

To add or update copyright information, click **Copyright**. This displays a form for entering the copyright information. The values that can be chosen for the Copyright field are

- **Limited to registered students (E)** – Only patrons who are registered in the course to which the bibliographic record is related are given access to the object. The system recognizes patrons as being registered in the course after they have signed in.

- **Open use, no copyright display (Y)** – When the Web OPAC user activates the link in the bibliographic record, a copyright notice appears. The user must sign this copyright agreement in order to link to the object.
- **Open use with copyright display (blank)** – When a Web OPAC user clicks the link in the bibliographic record, the link is immediately activated without having to sign a copyright agreement.

The value E, Y, or blank is added as subfield 4 to the first 856 tag of the linked bibliographic record. Therefore, the copyright restrictions are always the same for all the courses to which the bibliographic record is linked.

The form also includes fields for updating subfields \$\$v (vendor/provider code), \$\$f (type of fee), and \$\$c (fee amount). These subfields are optional and for information purposes only. If Fee data is entered, the code of the Provider must also be entered.

In addition to adding copyright information by clicking Copyright, you can define usage permission and limitation when cataloging a record in the GUI Cataloging module or when creating a new record in Course Reading's "Catalog New" form.

## 4.6 To Common/From Common

This action is used to move a reading list record from a Common list to an Individual list, or from an Individual list to a Common list.



This action is relevant only if you are using the “common” course option. As explained in [Section 1 Course Reading and Reserves Overview](#), the system will allow (but not require) preparing a list of documents that will be used in common in multiple courses that share the same Course Number.

The following scenarios illustrate why you will want to use of the “To Common/From Common” option:

- A reading list is received for a particular course, such as 1092: Basic Macroeconomics, taught by Al Smith. A course record is created with course number and name, instructor, etc., and bibliographic records are added through file load and/or search and/or cataloging. At a later time, another reading list is received for Jimmy Jones’ 1092: Basic Macroeconomics course. The operator finds the first course in the list, and on comparing the existing course reading list with the reading list received, finds that most of the records are the same. The operator selects lines from Al Smith’s course reading list and clicks **To Common**. A new course record for managing a common list is automatically created. When Jimmy Jones’ Basic Macroeconomics course is added, these records are automatically and immediately included in his Reading List. Additional records can be added, if necessary.
- Notification is received by the Course Reading librarian that Mike Anderson wants a record removed from his Greek Philosophy 101 reading list. The librarian searches for the course, displays the Reading List, and finds that the record is listed for use in common by all the instructors of Greek Philosophy 101. The librarian changes the focus to the "all instructors" course, selects the record, and clicks **Move From**. The record is added to each of the individual instructors’ courses, and removed from the "all instructors" course. The librarian then returns to the Mike Andersen’s course and removes the record.
- Notification is received by the Course Reading librarian that Linda Greene wants to suppress a record in her Political Science 205 course reading list. The librarian searches for the course, displays the Reading List, and finds that the record is used in common by all the instructors of the course. The librarian changes the focus to the "all instructors" course, selects the record, and clicks **From Common**. The record is added to each of the instructors’ individual course reading lists and is removed from the "all instructors" course. The librarian then returns to Linda Greene’s course list, and performs "suppress" on the record.

Click **From Common/To Common** to transfer the selected reading list record either from a common list to all the individual lists of a course or from an individual course list to a common list, depending on the context of the Reading List display. Multiple lines can be selected.

## 4.7 Suppress/Unsuppress

The Suppress or Unsuppress button is active only when a single Reading List record is selected. The button will say “Suppress” or “Unsuppress” depending on the status of the record that has been selected.

If the record is part of a common reading list, it must be suppressed/unsuppressed on the common reading list.

The Suppress button adds "STA \$\$a SUPPRESSED" to the connection record that contains the link to the bibliographic and course record. If the record is listed in a common reading list for multiple instructors, it will be suppressed for all the instructors. If it should be suppressed for one instructor, but not for another, the common record should be moved to the individual courses (see [Section 4.6 To Common/From Common](#) – third scenario) and then selected for suppression on the relevant individual reading list.

The Unsuppress button removes the "STA \$\$a SUPPRESSED" field from the connection record.

If the same bibliographic record is registered in several reading lists, it will be suppressed/unsuppressed only for the reading list from which it was selected.

## 4.8 Push to Cataloging

Click **Catalog** to transfer the record to the Cataloging module in Cataloging Draft format. Standard cataloging functions can be used. Once the record is saved in the system, toggle from the Cataloging module back to Circulation to display the Reading list window.

## 4.9 Removing a Document from a Course

Click **Remove** to remove a document from a reading list. Multiple lines can be selected.

If the record is part of a common reading list, it must be removed from the common reading list. If the record should be removed for one course but not for the others, the common record should be moved to the individual courses (see [Section 4.6 To Common/From Common](#) – third scenario) and then selected for removal on the relevant individual reading list. If the same bibliographic record is registered in several reading lists, it will be removed only for the reading list from which it was selected.

When a document record is removed from a reading list, hold requests that were placed for course reading are deleted.

## 5 Reading List – Lower Pane

The lower pane of the Doc List displays information related to a single entry in the List. The pane includes three tabs: Bib Info, Items, and Attached to Courses.

- **Bib Information** -Displays the bibliographic record of the selected line. Course information is displayed in addition to the bibliographic information.
- **Items Information** -Displays items and circulation information, including Sublibrary, Collection, Item Status, Due Date, Item Barcode, Number of Requests, Last Return Date, etc.
- **Attached to Courses** -Displays a list of the additional courses in which the record is registered.

### 5.1 Tab 1: Bib Info

The screenshot shows the 'Doc List - Macro - Level 2 (Pasternak, Olive)' window. It features a table with columns: Doc Number, Call Number, Author, Title, Year, Open Date, Other Cour, Local, Suppress, and Common. Two entries are visible, with the second one selected. Below the table is a 'Sort Type' dropdown. To the right of the table are buttons: Search, Catalog New, Load File, Edit Notes, Copyright, To Common, Suppress, Remove Doc, and Catalog.

The 'Bib Info' tab is active, displaying a 'Record Bibliography' section with the following data:

Marc Tag	Data
Connect SysNo	000009684
Linked Doc	PLN01-000308220-112235-2
Course/Instructor	Macro - Level 2 - Pasternak, Olive
Unit	Economics
Note	Read ch.2 by end of Xmas break and ch.6 by end of Spring Break
Title	Money, expectations, and business cycles : essays in macroeconomics / Robert J. Barro.
Author	Barro, Robert J..
Publication Info.	New York : : Academic Press, 1981..
Description	xi, 375 p. ; 24 cm.
Bibliography	Includes bibliographies.
Subject	Macroeconomics

The bibliographic and course information displays in the Bib Info tab.

## 5.2 Tab 2: Items

The screenshot displays two windows from a library management system. The top window, titled "Doc List - C++ Language (Avelet Lvn)", contains a table of document records. The bottom window, titled "1. Bib Info 2. Items 3. Attached to Courses", shows the "Items" tab with a table of item records.

Doc Number	Call Number	Author	Title	Open Date	Other Course	Suppressed	Common
1/13		Boom, Jan van, 1807-1872.	Air varié : for two flutes, op.	04/07/07			✓
2/13	HV560	International Committee of the Red	Annual report - International	17/07/07	✓		✓
3/13		Bernstein, Leonard, 1918-	Bernstein by Boston [sound]	27/06/07	✓		✓
4/13		Lloyd Webber, Andrew,	Cats : the songs from the musical	19/06/07			✓
5/13	UG633		Citizen airman : official	04/07/07			✓

Sort Type: Title

Due Date	Sublibrary	Status	Item Barcode	Request	Collection	Loans	Last Return	Patron ID
	Music Library	4-hour loan	3204406 4281645		Record Coll.			

Sort Type: Vol./Desc./Library/Collection

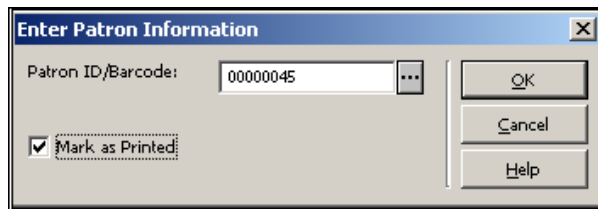
The items in the operator's ADM library are listed in the Items tab. Some possible actions on the items display are:

- Place a request for Picklist functionality
- Display the Items List in the Circulation module
- Display the Items List in the Cataloging module

### 5.2.1 Reserve Reading Picklist

In order to be able to print a picklist of items in anticipation of the onset of a course, a hold request must be placed on the items. In order to create holds, select an item (or items) and click **Hold Request**. This button can be activated for a single entry selection of items and for multi-line selection of items. Each copy that is intended for transfer to the Reserve Reading collection must be requested. Enter the Course Reading Patron ID (defaults to the last ID input on the workstation) in the window that pops up.

The Course-Reading patron must have been added in advance with all the permissions for this kind of activity.



A hold request becomes active (that is, it will be retrieved for the pickup list report)  $n$  days (where  $n$  is set by your System Librarian) prior to the Starting Date of the Course. Note that all hold requests placed via the Course Reading module are automatically defined as Rush Recall requests. The course number is registered in the Note 1 field of the hold request, and CRSE-READ is assigned to the hold request cataloger name.

In order to change a particular hold request (e.g. immediate recall, setting recall due date), the hold request should be updated in the Circ GUI.

The “Mark as Printed” checkbox determines whether the hold request print status will be marked as “printed”. If your library uses the Course Reading Course-02 (Print Pickup List) service to produce a picklist, the checkbox should be checked. If your library uses the ongoing “print requests” operation (CIR-12 or ue\_06 procedures) to print requests for these items, the checkbox should be unchecked.

### 5.2.2 Circ Items

Click **Circ Items** in order to display the items list in the Item tab in the Circulation client.

### 5.2.3 Cat Items

Click **Cat Items** in order to display the items list in the Item tab in the Cataloging client.

## 5.3 Tab 3: Other Courses Link

The screenshot displays two windows from a library cataloging system. The top window, titled "Doc List - Macro - Level 2 (Pasternak, Olive)", contains a table with columns: Doc Number, Call Number, Author, Title, Year, Open Date, Other Cour, Local, Suppresses, and Common. Two rows are visible, with the second row highlighted in blue. The second row shows Doc Number 2/2, Call Number 1 Macro - Level 2, Author Barro, Robert J., Title Money, expectations, and the, Year 1981, Open Date 24/10/07, and a checked box in the Local column. To the right of the table is a vertical toolbar with buttons: Search, Catalog New, Load File, Edit Notes, Copyright, To Common, Suppress, Remove Doc, and Catalog. Below the table is a "Sort Type" dropdown menu.

The bottom window, titled "1. Bib Info | 2. Items | 3. Attached to Courses", has the "Attached to Courses" tab selected. It contains a table with columns: Course Number, Course Name, Department, Unit, Instructor, Date From, and Date To. One row is visible and highlighted in blue, showing Course Number 112235-1, Course Name Macro - Level 1, Department Behavioral Sciences, Unit Economics, Instructor Franklin, Sidney, Date From 01/09/07, and Date To 01/06/08. To the right of the table is a "Course" button.

When the third tab (list of other courses to which the record is also linked) is in view, and the Course button is clicked, the view switches to the Course Doc List of the course selected, with the same doc record highlighted.

## 6 Items – Adding and Updating

### 6.1.1 Adding Items to Cataloged Records

Click **Cat. Items** to transfer to the GUI Cataloging - Items tab, where standard items functionality can be used to add items, change item information, etc. The "**Cat. Items**" button is active only when there is already an item attached to the record. If there is no item attached to the record, it is possible to click "**Catalog**" and push the title record to the cataloging module where you can use the standard functionality to create a new item.

### 6.1.2 Full Circulation Information and Actions

Click **Circ. Items** to transfer to the GUI Circulation - Items tab, where standard items functionality can be used to view a list of requester ID's, etc.

### 6.1.3 Changing Item Information

Use the “Change Item Information” and “Restore Item Information” options under Items on the Circulation client menu bar to change item status and collection when moving items into and out of the reserve collection.

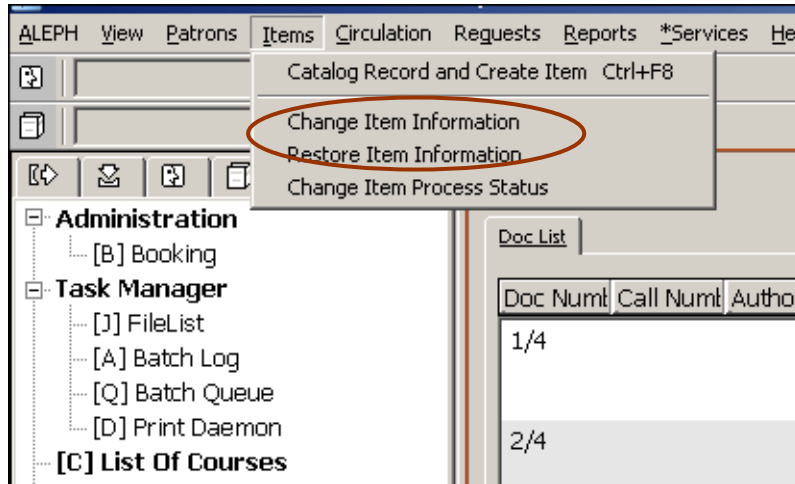
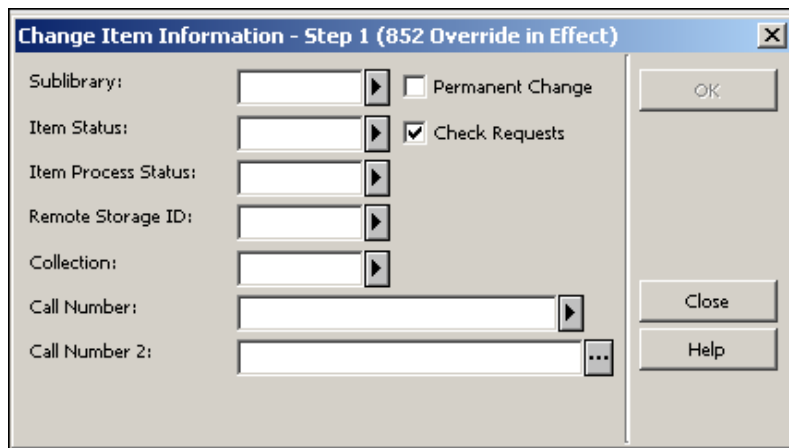
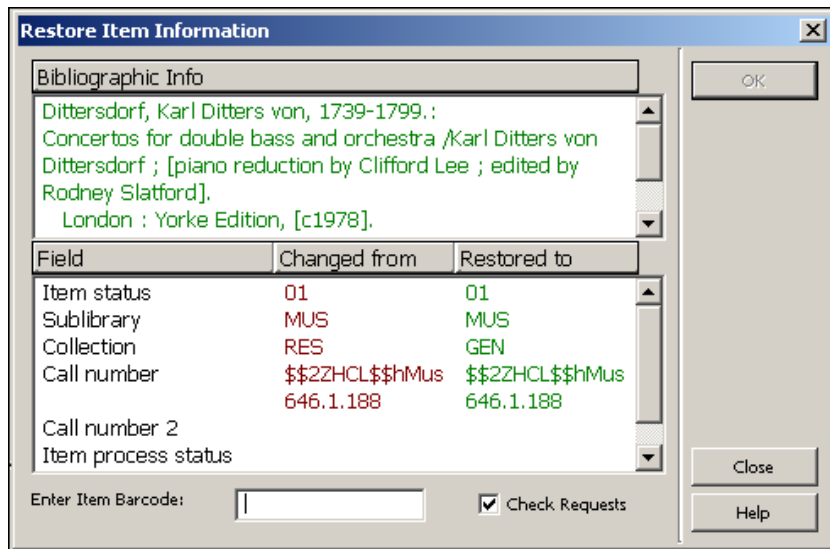


Figure 1: Item handing



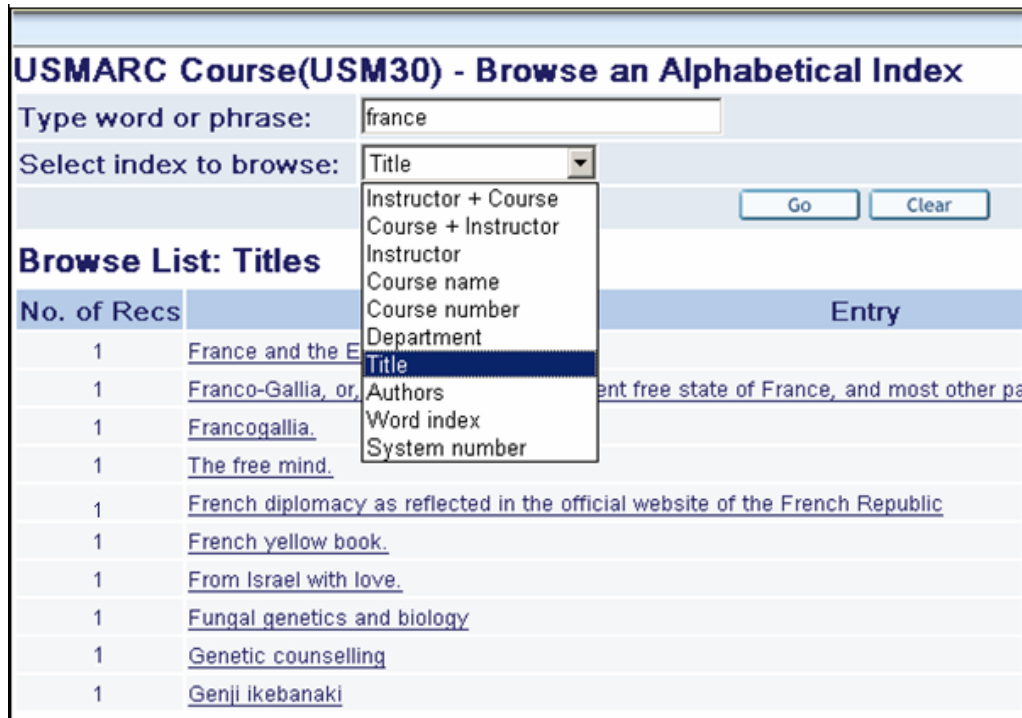
The Permanent Change checkbox should be left unchecked for items which are temporarily located in reserves. When Change Information is performed, the original values are stored in the Z30 field of the ADM record, and the item is marked as having a “Temporary Location”.



Enter the barcode of the item to restore the original item values from the ADM record's Z30 field. This action also removes the Z30 field.

## 7 Searching in the Web OPAC

The functionality of the Course Reading Web OPAC interface is the same as the functionality of the ALEPH Web OPAC. The Course Reading library is a standard base to be searched by users with dropdown Search and Browse options suited to the Course Reading OPAC.



In order that records that are linked to more than one course will display once only, the Union View mechanism is applied to the Course Reading database. The Union View catalog provides virtual de-duplication of records that are detected as being the same. Records that are linked to more than one course display as a single de-



duplicate record, with the course information from all the records displaying in the single merged display.

[Title Request](#) | [BIB Request](#) | [Add to My e-Shelf](#) | [Booking](#) | [Locate](#)

## Full View of Record

Choose format: [Standard format](#) [Catalog card](#) [Citation](#) [Name tags](#) [MARC tags](#)

Record 1 out of 1

Course Information	
Course	● <a href="#">4622 French Diplomacy - Marks, Julia</a>
Course	● <a href="#">4622 French Diplomacy - Brown, Valerie</a>
Course	● <a href="#">334455 Introduction to Social Science - Cohen, Daniel</a>
LC no.	DC60.8 .H6 1721
Main Author	● <a href="#">Hotman, François, 1524-1590..</a>
Title	● <a href="#">Franco-Gallia, or, An account of the ancient free state of France liberties</a> <small>Written originally in Latin by the famous civilian Francis Hotman</small> <a href="#">Account of Denmark.</a>

## 8 Course Reading Services

Each service is identified in the Batch Log and Batch Queue by its procedure name.

### 8.1 Course Reading Lists Report (course-01)

The Course Reading List reports the courses defined in the course reading module according to the requested filter parameters. The output print file begins with details of the Course record, and includes details of the items registered to each bibliographic record.

Courses with no attached titles will not be reported by this service.

Note that common reading lists which are not assigned to instructor's courses will not be reported by this service.

### 8.2 Pickup List (course-02)

This service creates a batch report of requested items in order that they can be picked up from the shelves for transfer to Reserves. The list is set to include items located in particular sublibraries and requested for a particular user (patron id). If no patron ID is specified, all requests will be included.

Requests that are not already flagged as “printed” are updated to “printed” by this process.

### **8.3 Remove Items from Reserve Collection (course-03)**

This report lists title and item information (sublibrary, call number and barcode) of Course Reading records that are linked to a course that is not currently active (based on the date-to field in the Course record). It also includes an option to take items off reserve for inactive courses by removing the temporary item information. If this option is chosen, the item records will be restored to the values they had before they were placed on reserve.

### **8.4 Course Reading Records that Are Not Linked to a Course (course-04)**

This service creates a report containing a list of bibliographic records that were part of the reading list for a course and have been removed from the Course Reading list. The report includes the title, Course Reading record system number, ADMInistrative record system number, and each item, giving the sequence number, barcode, and call number.

### **8.5 Course Not Active Report (course-05)**

The Course Not Active service identifies courses that are no longer active according to the 'Course To Date' field and updates the course period to 'NA' (Not Active). The process can be run for report only, or for both report and database update.

### **8.6 Course Summary Report (course-06)**

This report contains a list of the Course Records, giving course record details. The report can include all courses or can be filtered by various course fields. Note that only instructor's courses will be reported by this service (courses that are set for defining common reading list will not be reported by this service).