

## About Sierra Course Reserves

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Understanding both Sierra Course Reserves and Sierra Media Management is key for the functions to operate smoothly. This tutorial is intended as a guide for setting up new course reserves records and adding media files to your Sierra system, and as a reference tool for later questions. It covers such topics as creating and modifying course records, checking items in and out of course reserves, possible workflow ideas, and creating media sets to store electronic media information for use with or without course reserves.

The tutorial as a whole can be used in one of two ways. For new Sierra libraries, or for new library staff just beginning to use Sierra Course Reserves and Media Management, this tutorial can be followed in a step-by-step manner, using

the [NEXT PAGE →](#) and [← PREVIOUS PAGE](#) navigation icons. Using the tutorial this way will guide you through all functions of Course Reserves.

A second way to use the tutorial, particularly suited for a department supervisor primarily interested in a certain task, is to use the menu based approach. Using the menus at the top of the tutorial, you can find the topic you are interested in and go directly there.

Customers who would like to mount this tutorial on a local server for the use of their staff without having to allow them full access to CSDirect, may download the tutorial as a ZIP file. After the file has been downloaded and unzipped into the Local directory of choice you will see a list of individual html pages. Double click to open a page called index.html and the tutorial will be accessible.

## Navigation & Requirements

At the bottom of each page are links to the next and previous pages. We recommend you follow through the tutorial steps using the

← [PREVIOUS PAGE](#) and [NEXT PAGE](#) →

Within pages there are links to other pages in the tutorial. Use your browser's **Back** button to return to your previous place in the tutorial.

Links to pages outside the tutorial open in a separate browser window. To return to the tutorial, close the external link window, or click on the tutorial window to make it active.

**HOT TIP** is used to highlight information that either illustrates or expands a point in the tutorial text.

### Recommended Software and Hardware Settings:

For optimal viewing:

Internet Explorer 6.0 and above  
Mozilla Firefox 1.5 and above  
Mac: Safari 1.2 and above

800x600 screen resolution (1,024x768 recommended)

The complete tutorial can also be printed in [Course Reserves PDF](#) format. To view and print it you need Adobe Acrobat Reader software which you can download from



### Download

Customers who would like to mount this tutorial on a local server for the use of their staff, without having to allow them full access to CSDirect, may download the tutorial as a [ZIP](#) (size of 1.44Mb) file.

After the file has been downloaded and unzipped into the Local directory of choice you will see a list of individual html pages. Double click to open a page called index.html and the tutorial will be accessible. Once it has been downloaded locally, you may choose to open it in a web editor and insert local policies, practices or notes.

Please note that internal links to the Sierra WebHelp will result in a "page cannot be found" error message since the tutorial uses a relative addressing system.

Please contact us if you have [questions](#), [comments](#) or [problems](#).

## How Does Course Reserves Work

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Course Reserves allows your library to create a subset of high use items in the library with a much shorter loan period so that patrons taking a particular class have easier access to these materials. If your library chooses, Course Reserves can be configured to track the different circulation patterns for items on and off reserve (since low use items typically become high use when on reserve). Course Reserves also allows for circulation of material not in the library's catalog (e.g. a professor's personal copy of an item or photocopied material) to be placed on reserve. Some libraries use Course Reserves to create a reading list within their Encore/WebPAC without permanently changing locations or loan rules for the materials on the list.

Course Reserves involves creating course records (one record per course) that can be accessed in a number of ways. Like the bibliographic record, the course record is a stand-alone record, meaning that it does not have to be linked to any other record. Course records can have links to other records, such as bibliographic and item records. These links can be made active or inactive depending on when the item is or will be on reserve. It is these links that enable Sierra to see the items on reserve, and display the item(s) in the Encore/WebPAC as being on reserve for a course.

When an item is placed on Course Reserves, Sierra stores the item's original Item Type and Item Location. These original settings revert back when the item is taken off reserve.

## Course Records

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The following three pages discuss how to create, edit and delete course records:

[Creating a Course Record](#)

[Editing a Course Record](#)

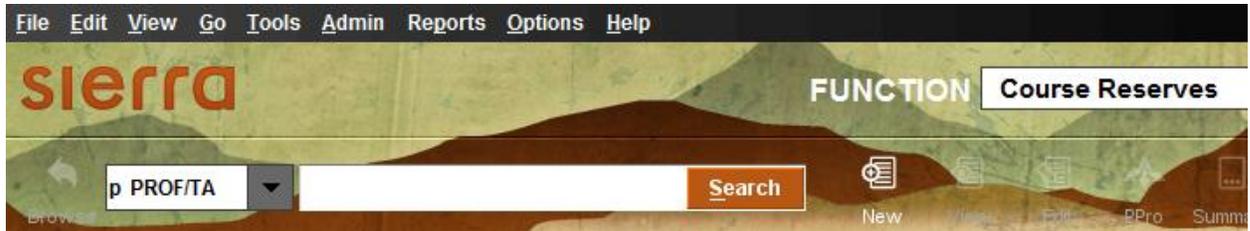
[Deleting a Course Record](#)

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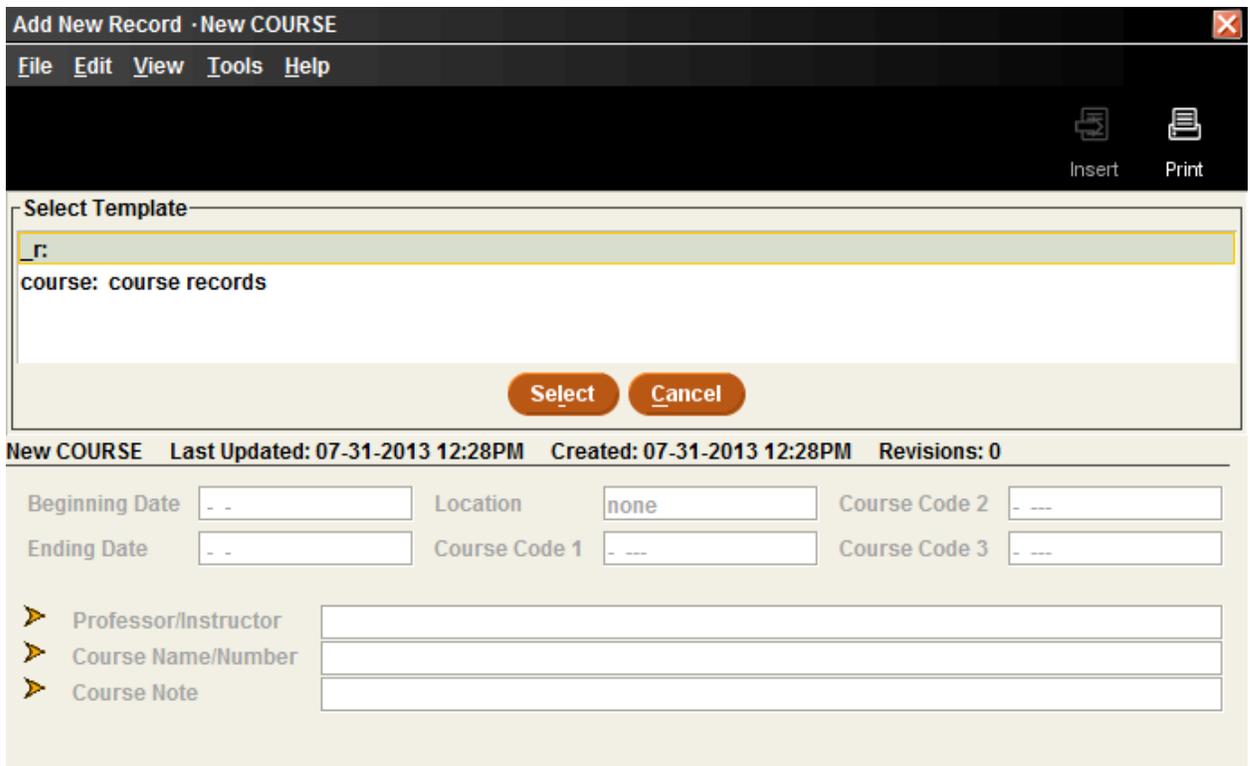
## Creating a Course Record

To enter Course Reserves function, you must be authorized for permissions 48 (Course Reserves) and 171 (View course records). To create and/or modify a course record, you must be assigned permissions 172 (Create course records) and 174 (Update course records).

To create a new course record, select "Course Reserves" from the Function menu and select New from the toolbar.



Depending on how your system is configured, this will either prompt you to select a template for the new record, or will launch a preselected template.



If your login is configured to use the "wizard", different prompts will pop up asking for information to be filled in. In above example, a beginning date of the course is being requested. As is normal in Sierra, you can type a "t" to enter today's date, a "c" to call up the calendar, or you can manually enter the date of your choice. Clicking on "Next" will bring up the next prompt. Once all the fields that are set to prompt are filled in, the record will appear on your

screen. At this point, you can edit fields, add other fields, or save the record.

If your login does not use the "wizard", you will be presented with a new record form, without prompts.

Fixed and variable length fields in the course record include:

**Beginning Date:** The date on which the course starts and materials are available

**Ending Date:** The date the course ends, as well as the date when attached items should be taken off reserve

**Course Code:** Library specific. One of these can be set to suppress the record

**Professor/Instructor:** Name of the person teaching the course. This is used as an access point in the Encore/WebPAC

**Course Name/Number:** Name of the course. Also used as an access point in the Encore/WebPAC

**Course Note:** Internal note about the course.

To make record creation easier, consider creating a template for course records which prompts for all the fields listed above.

Once you have saved the record, it will appear in the system with a system generated record number with prefix 'r', and you will be able to attach items to the record.

The screenshot displays the Sierra Course Reserves web application. At the top, there is a navigation menu with options: File, Edit, View, Go, Tools, Admin, Reports, Options, and Help. Below this is the Sierra logo and the text 'FUNCTION Course Reserves'. A search bar contains 'r COURSE' and '100000', with a 'Search' button. To the right of the search bar are icons for 'View', 'Edit', and 'Summary'. Below the search bar, the course record is displayed with the following details:

- Record ID: r10000446
- Professor/Instructor: Innovative, Instructor
- Course Name/Number: Intro to Systems
- Course Note: An intensive 4 week program designed to prepare the student for general

Below the course details, there is a 'Course List' section. It includes buttons for 'Add Items or Bib', 'Remove Items or Bibs', 'Change Status', 'Move', and a checked 'Prom' button. Below these buttons is a table with the following columns: #, All, Title, Barcode, Call Num, Author, Status, and Un.

See the [Sierra WebHelp](#) for more tips on [Entering Data into New Records](#).

## Editing a Course Record

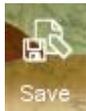
If you want to edit a course record, open the Course Reserves from the Function menu. Search for and select the course record you want to edit. Click on the Edit button



and proceed to make your changes. Fields that you may edit include all of the fixed fields as well as the following variable fields (note that other library specific variable fields can be created by Innovative):

- Professor/TA name
- Course name or number
- Course note

Once you have made the changes you wish to, click the save button



and your changes will be made permanent.

**NOTE:**

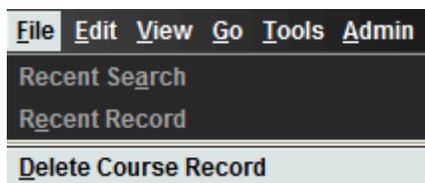
Innovative Interfaces offers a [Service Commitment](#) to set up Course URLs. These are not the same as URLs in Media Management. There is also a Service Commitment to add new variable length fields or to change variable field or fixed field labels. For a complete list of changes that can be requested, see [System Changes Made by Innovative Staff](#).

## Deleting a Course Record

When a course is finished, the library has two options to deal with the course record. A course can be deleted or suppressed. Deleting is a manual operation, whereas suppression can be either manual or automatic.

The first concern is the attached items/bibs. Before anything can be done to a course record, any attached items or bibs must be either made inactive or deleted. If the record is going to be suppressed, then making the attached item/bib records inactive may save time later on.

To delete a course, search for it by either the course name or the professor name. Once you've selected the proper course from the list, [remove the attached item/bib records](#). Next, click the EDIT button and choose **File | Delete Course Record**.



You will see a pop up box that asks you to confirm your request. Click "Yes" and the course record is deleted. Once deleted, the record is not retrievable.

If the course might be taught again in the future, it may save library staff time to simply suppress the record rather than deleting it and having to recreate it. Suppressing the course record will keep the record information in the system, but the public will not be able to access it through Encore/WebPAC.

To suppress a course record, search for and select the record you want to work on. Click the EDIT button and change your library's suppression code from "-" to "suppress". The suppression code will use a value in one of the course codes, previously determined. Many libraries use Course Code 3 for their suppression code, and often libraries use 'n' as their suppression code value. Save the changes, and the course record will now be invisible to the public through the Encore/WebPAC. Staff will still be able to see the record. Please note that creating suppression codes must be done in advance of using any suppression value, and can be enabled by Innovative with a [Service Commitment](#).

When a course is suppressed, the attached items revert back to their original Item location in the Encore/WebPAC. Unless the item is suppressed, an active item on reserve is always available within the Encore/WebPAC but displays as being on reserve. If the item is suppressed (as opposed to the course) and is active on reserve, it will only display when searched via the reserves link from the Encore/WebPAC.

**HOT TIP**

Innovative Interfaces can set up your system to automatically suppress the course record by changing the status of all of the attached items/bibs to inactive. Once all the attached records are inactive, the system automatically makes the course record inactive. This feature is a [Service Commitment](#).

Note that removing all the attached items/bibs from a course record does not automatically make the course inactive, nor does it delete the course.

## Creating & Attaching Records to Courses

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This section of the tutorial will show you how to create, attach, and remove item and bibliographic records from course records.

[Course Settings](#)

[Material Already in the Library Catalog](#)

[Material created for Reserves](#)

[Removing Bib/Item from Course Record](#)

[Bib/Item Attached to Multiple Course Records](#)

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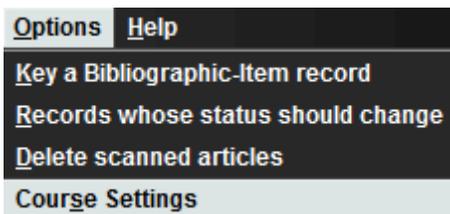
## Course Settings

You can set Course Reserves Settings to apply to all items added during your current session in Course Reserves function, and you can change these settings at any time within the session to apply different settings to subsequent items. Keep in mind that Course Reserves Settings are only retained while you are working in Course Reserves function, which can include working on multiple Course Reserve Lists. When you change functions, the system clears the Course Reserves Settings. If you do not set this, you will be prompted for this information each time you add an item to a course record.

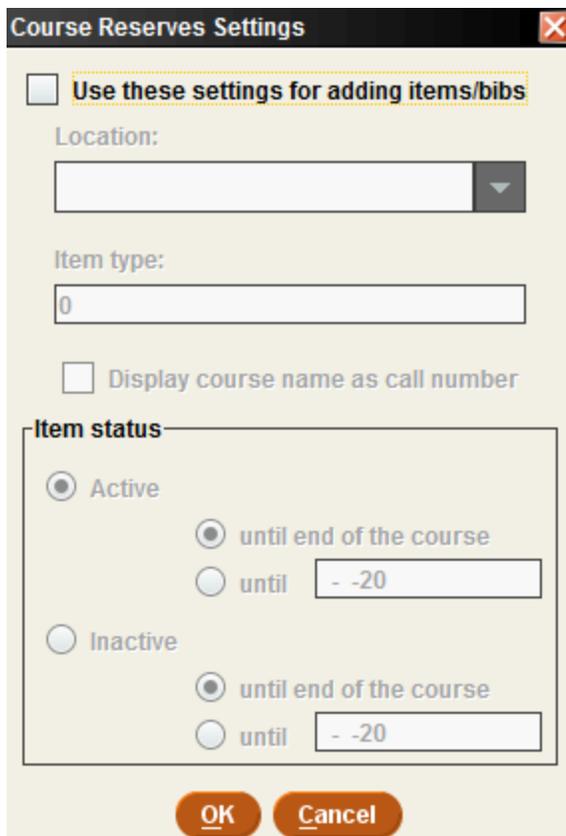
### Applying Settings to a Course Reserves Function Session

To apply Course Reserves Settings to the entire session:

From the menu bar, select **Options | Course Settings** from the dropdown menu.



The Course Reserves Settings dialog box appears.

A screenshot of the 'Course Reserves Settings' dialog box. It features a title bar with a close button. The main content area includes a checkbox labeled 'Use these settings for adding items/bibs' which is checked. Below this are two input fields: 'Location' (empty) and 'Item type' (containing '0'). There is also a checkbox for 'Display course name as call number' which is unchecked. A section titled 'Item status' contains two radio button options: 'Active' and 'Inactive'. Under 'Active', there are two sub-options: 'until end of the course' (selected) and 'until' followed by a text box containing '- -20'. The 'Inactive' section has identical sub-options. At the bottom are 'OK' and 'Cancel' buttons.

Check the Use these settings for adding items/bibs checkbox.  
Enter location, item type, and item status values.  
If you would like to use the course name as the call number, check this box.

Please note:

This setting will create a MARC tag to hold the information. For most libraries this information will be stored in a 940 field in the item and/or bibliographic record depending on how your system was set up. As long as the item/bib remains [active](#), the information in the course name will display as the call number in Encore/WebPAC. When the item/bib is [removed from the course](#) or made [inactive](#), the MARC field is removed.

#### **HOT TIP**

Use course name as call number if your library shelves reserve materials by course name.

When finished, click OK to save your global settings; click Cancel to return to the Course Reserves list without saving any global settings.

With these changes, any item/bib record you add to a course record will have these settings. If you need to add items/bib records that do not require these exact settings, you will need to open the Course Reserve Settings window and either uncheck the 'Use these settings for adding items/bibs' or modify the settings to what you need.

#### Save Item Field

Whenever an item is placed on reserve, Sierra will save the original item location, original item type, and the original number of checkouts in a system generated field located at the bottom of an item record. This field only appears in an item on active course reserve.

The SAVE ITEM field contains the following subfields:

OITYPE: The original I TYPE.

OLOCAT: The original LOCATION.

OCHKOUT: The original value of the TOT CHKOUT field. (Sierra Circulation resets the TOT CHKOUT field in the item to zero so statistics can be recorded on the item's circulation while on reserve.)

For example, the SAVE ITEM field might appear as:

SAVE ITEM OITYPE=2, OLOCAT=jamat, OCHKOUT=5

When you remove the item from reserve or change its status to inactive, Sierra Circulation automatically restores the values of the LOCATION, I TYPE, and TOT CHKOUT fields in the item record and removes the SAVE ITEM field.

#### Retain Number of Checkouts from Reserve Circulation

Innovative can set your system to retain the number of checkouts from reserves circulation. If this feature is enabled, when you remove an item from reserve or change its status to inactive,

Sierra Circulation includes the total number of times that the item circulated while it was on active reserve in the item record's TOT CHKOUT fixed-length field. Enabling this feature is a [Service Commitment](#).

By default, Sierra Circulation assigns the value of the OCHKOUT subfield to the TOT CHKOUT field, thereby discarding the number of times that the item circulated while it was on active reserve.

#### TOT RENEW Field

The value of the TOT RENEW fixed-length field is not included in the SAVE ITEM field. The TOT RENEW field retains its value even while an item is on active reserve. Consequently, while an item is on active reserve the TOT RENEW value may be higher than the TOT CHKOUTS value. If your library has asked Innovative to turn on the 'retain number of checkouts from reserve circulation' feature mentioned above, this discrepancy will be resolved when the item is taken off reserve and the original values are restored to the record. Otherwise, for example, the old checkout could be 50. Reserve circulation was 100 checkouts and 25 renewals. Previous renewals were 30. Total renewals are now 55 but the restored total checkout \*without\* reserve checkouts is back to 50. Renewals are still higher.

## Material Already in the Library Catalog

If all the materials you are placing on reserve are already represented within your library's catalog, you will need to attach the catalog record (item or bib) to the course record. This page provides information on how to attach records in your system to the course records.

The ability to add bibliographic records to a course reserve record is not automatic. While your library may be able to attach a bibliographic record before contacting Innovative, your system may not be recording the reserve history. If you would like your Sierra system to record this history, Innovative must do the set-up prior to this functionality becoming available, and this is a [Service Commitment](#).

To add catalog records to a course record, change to Course Reserves function and retrieve the course record to which you want to attach items. Once a course record is open, you will see the 'Add Items or Bib' button.

#	All	Title	Barcode	Call Num	Author	Status
1	<input type="checkbox"/>	Technology and the chara...	3834400001...	T14 .B63 1...	Borgmann, Alb...	Active
2	<input checked="" type="checkbox"/>	Instructional design in the...		LB1028.38 ...		Active

Clicking on this button will open a search window and you can search for the record you want to add to the course. When you select the record it opens the Summary screen.

#	Record Number	Location	Barcode
<input checked="" type="checkbox"/> 1	i10841374	epan	31298002080342
<input type="checkbox"/> 2	i10841349	epref	31298002080284
<input type="checkbox"/> 3	i10841350	epref	31298002080516
<input type="checkbox"/> 4	i10841362	epref	31298002080524
<input type="checkbox"/> 5	i10841386	epref	31298002080409
<input type="checkbox"/> 6	i10841398	epref	31298002080458
<input type="checkbox"/> 7	i10841404	epref	31298002080466
<input type="checkbox"/> 8	i12895659	mhn	31298002080342

From here, you have two options:

You can pick and choose the items you want added to the course record and click the 'Add Selected Items' button.

If you want to add all the items to the course record, you can click 'Use Bib.'

If you did not set the [global course reserve settings](#) earlier, then either choice will prompt the 'Course Reserve Setting' window to appear.

**Course Reserves Settings**

Use these settings for adding items/bibs

Location:  
iures

Item type:  
54

Display course name as call number

Item status

Active

until end of the course

until 05-15-2015

Inactive

until end of the course

until - -20

OK Cancel

In this new window, you will need to change the item location and item type to correspond with your reserves location and item type. If you chose to add the bib record to the course record, you will only have to modify the information in this window once. If you add selected items, you will have to change this for each item selected.

**NOTE:**

Changing the item's type and location in this window is only for the duration the item is on reserve. Sierra remembers the item's original location and status, and these settings will be returned when the item(s) is(are) taken off reserve.

With the Course Reserve Setting window open, you should also set the Item's Status section of the window. Click the radio button for 'Active' to set a date for the item to be removed from Course Reserves. Since the course's end date is set in the course record, you can click the radio button 'until the end of the course' to have the item be automatically removed from course reserves at the same time. You can also specify a date for instances when the item is temporarily on course reserve and will be removed before the course ends. To do this, click the radio button for 'until' and enter the date the item will be taken off reserve in the text box.

**HOT TIP**

The 'end of course' consults the course record's Ending Date field. Many libraries rapid update these at regular times and also update the templates regularly so that newly created courses default to the next set of dates for which the library is creating courses.

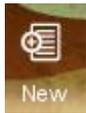
Click the 'Inactive' radio button to make an item inactive and follow the same procedures above for the 'Active' setting.

Once this window is filled out, click OK and the bibliographic and/or item records are now added to the course record. If the item/bibliographic records are inactive, they will become active on the date set during the above set up.

## Material Created for Reserves

If the material you need to attach to the course record does not exist in your library's catalog (for example, a professor's personal copy), you will need to create a brief bibliographic record and an item record for the material. Depending on your library's cataloging practices for keying records, this record could contain only basic bibliographic information, or be a fully cataloged record.

Search for the course record to which you want to add a new bibliographic record. At this screen, click the 'Add Items or Bib' button. In the new window that appears, click the New button on the toolbar at the top of the window.



You can also choose the drop down menu **File | New Record | New Bibliographic** or you can enter Ctrl+N.

Depending on how your login is configured, this will either prompt you to select a template for the new record, or will launch a preselected template.

If your login is configured to use the "wizard", different prompts will pop up asking for information to be filled in. Once all the fields that are set to prompt are filled in, you can edit fields, add other fields, or save the record.

If your login does not use the "wizard", you will be presented with a new record form, without prompts. Double click on each fixed-length field to see its options. To insert variable-length fields, you can click the Insert button, or use the drop-down **Edit | Insert Field**, or hit Ctrl+I. This will prompt the insert field window. Use the drop-down to decide which field you want to use and fill in the information.

**Add New Record - New BIBLIOGRAPHIC**

File Edit View Tools Reports Help

Insert a non-MARC field

c Call No. [ ]

Next Cancel New Record Creation

Language eng English Cat. Date - - Bib Code 3 - WILL DISPLAY

Skip 0 Bib Level - UNKNOWN Country xxu U.S. (state not known)

Location none Material Type a PRINTED BK/JNL

➤ Call No. [ ]

➤ Author [ ]

➤ Title [ ]

➤ Publication Info. [ ]

➤ Subject [ ]

### HOT TIP

It may be useful for your library to have a specific template to use when you create bibliographic records that should be attached to course reserves. This will allow you to specify which information is required to be entered into the record. You may for example want to add a local note or a code, which makes it easy to retrieve records for statistical purposes or updating.

For additional information, refer to Sierra WebHelp: [Creating Record Templates](#)

After you save the bibliographic record, depending on the settings for your login, you may then be prompted to create single or multi-item records. If you are prompted, select whether or not to create single or multiple items. If you want to create multiple items, you can enter the beginning barcode, the number of items you want to create, and specify the volume numbering, if appropriate.

For the new item record, enter the information used by your library. You can use the same instructions as described above for editing fixed-length fields and inserting variable-length fields.

Save the records you created and add them to the course record.

### HOT TIP

If you have many records to create for Course Reserves, you may want to consider using the Sierra Cataloging module to make the process of bib/item creation more streamlined. You would thus create all the bib and item records before creating course records or linking to existing course records.

## Removing Bib/Item from Course Record

To remove an item from a Course Reserve List, you must be authorized for functions 124 (Update item records) and 174 (Update course records).

There are several ways to remove a bibliographic/item record from a course record.

When in a course record with attached items, highlight the items you want to remove and click the Remove Items or Bibs button. You can also right click on the selected item and select the 'Remove this bib's items' or 'Remove this item.'

The screenshot shows a 'Course List' interface. At the top, there are buttons for 'Add Items or Bib', 'Remove Items or Bibs', 'Change Status', and 'Move'. Below these is a table with columns: #, All, Title, Barcode, Call Num, Author, and Status. Two items are listed: item 1 with a checkbox and item 2 with a checked checkbox. A context menu is open over item 2, showing options: Copy, Remove this item, Remove this bib's items, Change this item's status, View bib and item(s), and Print Table (Standard Printer).

#	All	Title	Barcode	Call Num	Author	Status
1	<input type="checkbox"/>	Technology and the chara...	3834400001...	T14 .B63 19...	Borgmann, Alb...	Active
2	<input checked="" type="checkbox"/>	Instructional design in the ...				Active

Either choice will bring up the 'Remove Selected Items or Bibs' button. Click 'Yes' to remove, or 'No' to cancel.

When you remove the bib/items, their original Item type and Location will return automatically.

If you have a course that is offered on a regular basis and usually has the same materials on reserve each time it is taught, you can change the items' status to inactive and suppress the course record by adding the suppression code value to the appropriate Course Code. Changing the item/bib status to inactive will convert the Item type and Location in the records to the original settings and they can be circulated as normal items until re-activated.

The screenshot shows a course record form for ID 'r10000446'. It includes fields for 'Beginning Date' (08-15-2013), 'Ending Date' (- -), 'Location' (iures Innovative University Reserves), and 'Course Code 3' (n SUPPRESS). Below these are fields for 'Professor/Instructor' (McClellan, Mike), 'Course Name/Number' (Intro to Systems), and 'Course Note' (An intensive 4 week program designed to prepare the student for general ILS administration).

**r10000446**    **Last Updated: 08-10-2013 07:20AM**    **Created: 08-09-2013 02:19PM**    **Revisions: 4**

Beginning Date:     Location:     Course Code 2:

Ending Date:     Course Code 1:     Course Code 3:

Professor/Instructor:

Professor/Instructor:

Course Name/Number:

Course Note:

To change the item/bib status, you can highlight the item you want to change and click the 'Change Status' button. You can also right click on the item you want to change and select the 'Change this item's status.' Either choice will prompt the Course Reserve Settings window to appear.

**Course Reserve Setting**

**Location:**  
Jures

**Item type:**  
54

Display course name as call number

**Item status**

**Active**

until end of the course

until - -20

**Inactive**

until end of the course

until - -20

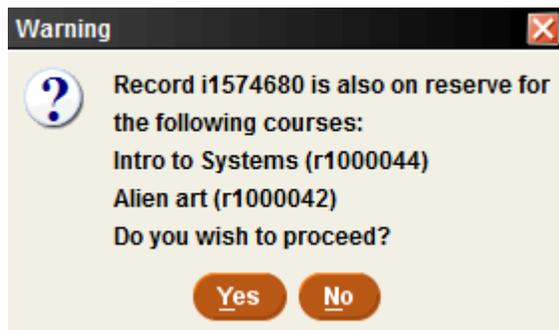
**OK** **Cancel**

With the Course Reserve Setting window open, you can change the Status section of the window. Click the 'Inactive' radio button to make an item inactive. You can then choose to make the item inactive until the end of the course or specify a date until which the item should remain inactive. Click OK and Sierra will return a results window confirming the course(s) made inactive and if there were errors. If there were errors, try again. If the errors do not disappear contact the Helpdesk.

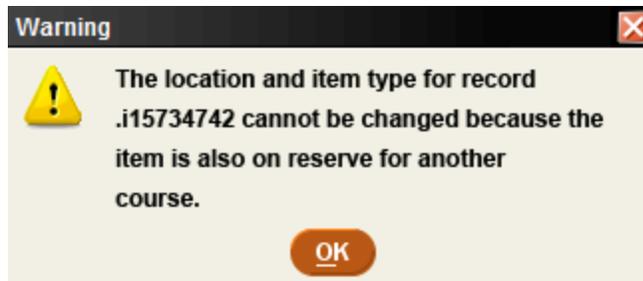
## Bib/Item Attached to Multiple Course Records

If you have two copies of the same bib and the bib is needed for different course records, consider adding the item record only -- one to each course. This way your library can specify separate item types, with potentially different loan periods, for each item.

Follow the steps in attaching a record as described in [Materials Already in the Library Catalog](#). Keep the Item type and item location the same as you set it during the first course. When you reach the point of adding the record to the second course, Sierra will stop you with a warning and ask you to proceed.



Click Yes. If you changed the Item type or item location from the original setting, Sierra will warn you.



Sierra will only add the record using the same Item type and item location set when it was added to the first record. Sierra cannot have the same item with two different item type or item location values.

### HOT TIP

If you have two copies of the same bib and the bib is needed for different course records, consider adding the item record only -- one to each course. This way your library can specify separate item types for each item.

## Using the Module

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This section of the tutorial discusses the specifics of using the Course Reserves Function, including providing ideas for possible workflows and policies to ensure that your reserves desk runs smoothly. It also discusses how to gather and report statistics.

[Possible Workflows](#)

[Circulation Policies](#)

[Changing an Item's Status](#)

[Searching Course Reserves in Encore/WebPAC](#)

[Checking Reserves In/Out](#)

[Reporting on Reserves](#)

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## Possible Workflows

When setting up your library's course reserve workflow, it may be handy to keep the following tips in mind:

To create the course records and get all the items attached in a timely manner, it may be beneficial to split up the work. First, create all the course records. By creating the course records at one time, you will be better able to make sure that the courses have standardized entries, which will help both staff and searchers.

Within the course record, think about utilizing multiple instances of the course name field. For example, you might have one entry match what is in the course catalog. Then have one entry write out the course name and number, and a third entry listing what people actually call it. So a course might be entered as:

Chem101  
Chemistry 101  
Freshman Chemistry

If your library is part of a consortium, use the course name field to differentiate one campus' courses from another.

ENG 111 Campus A  
ENG 111 Campus B

Your library may also consider changing the Call Number to Course Name. Innovative staff can add/modify the MARC tag and indicators used for call number (course name) in bibliographic records. Whether to use course name or the call number usually depends on the shelving order your library uses for reserve materials. If your library files/shelves by course name and number, you probably want to use course name as the call number. The variable fields are repeatable, but only the first occurrence of the field (topmost in the list) will display in Encore/WebPAC call number field so the first occurrence in the field should reflect the shelving naming convention.

The Professor/Instructor name field can be used for the professor's name as well as adding Teaching Assistant names. Remember that some students may be more familiar with the Teaching Assistant. The system is designed to index all name fields, so any associated name can be used to retrieve the course record.

Once you have all your course records set up, you can move on to your bib and item records for the material not in your library's catalog (professor's copy of a book, a textbook, photocopy sets, etc). For creating multiple new bib/item records, it may be more efficient to use the Sierra Cataloging module. Because of the multiple tools available in the Cataloging module, library staff can create the bib and item records more quickly and easily than they would be able to do in the Course Reserves function of the Circulation module.

To make circulation of Course Reserves materials easier, we suggest that you **BARCODE EVERYTHING**, including photocopied materials. It is much easier and more accurate to scan a barcode than it is to type in a book's title or the course number. If you cannot barcode a professor's copy of a book, you can barcode an envelope and put the book inside it, or barcode

an index card and stick the card in the book.

If you are using [Media Management](#), your staff may also want to create all the media files at once, making this a two-step process.

Once you have completed the cataloging of your reserve items, then proceed to do the linking of the bib/item records to the course records. Using this workflow will make the process much faster and will feel more streamlined.

## Circulation Policies

In order for items to circulate correctly, library staff need to carefully set up three specific areas. **Loan rules** determine the circulation period, and **Item types**, and **Location codes** are 2 of the 3 components that determine the loan rule (the third being Patron type). We'll look at each of these in more detail.

### Loan Rules

For each different circulation period you want to create, you will need to create a loan rule. For example, if you have five patron groups that each has different circulation periods for the same type of material, you would need to create five loan rules. A library can set up as many as 1,000 separate and distinct loan rules.

For additional information, refer to the Sierra WebHelp: [Loan Rules Table](#).

Name	Univ 2 hour reserve
Code	H
Normal Loan Period	2
Holdable	<input checked="" type="radio"/> yes <input type="radio"/> no
Bookable	<input checked="" type="radio"/> yes <input type="radio"/> no
Home Pickup	<input type="radio"/> yes <input checked="" type="radio"/> no
Shippable	<input type="radio"/> yes <input checked="" type="radio"/> no
Ship Time	0
Time Remaining B4 Renew	0
First Renewal Period	0
Additional Renewal Period	0
Max Number Of Renewals	0
Minimum Use	2

OK Cancel Print

There are many elements to creating a loan rule, but when dealing with reserves, you need to pay special attention to the code. You can choose to have loan periods measured in days (code **R**) or hours. If you choose hours, you can be very specific about how the hourly items will circulate:

- H** = Hours, rounded to nearest hour, overnight loan allowed
- I** = Hours, rounded to nearest hour, no overnight loan
- J** = Hours, rounded to nearest minute, overnight allowed
- K** = Hours, rounded to nearest minute, no overnight

**H** and **I** round off a loan period so that it will always be due on the hour. If a patron checks out a 3 hour reserve item at 3:25, the item would be due at 6:00, as the hour is rounded down. **J** and **K** round to the nearest minute, so that patrons receive the full loan period.

Whether or not reserves can be checked out overnight is also determined by this code. If no overnight loan is allowed, the item will be due at the location's closing time, as entered in the Hours Open table, even if that means that the patron will not get the full loan period specified. If overnight loan is allowed, and the due time would normally fall after the library's closing time as entered in the Hours Open table, the item will be due one hour after the library opens (or more specifically, one hour after the opening time as shown in the Hours Open table). Thus, manipulation of the Hours Open table allows the library to manage the times that they want material to be returned, regardless of the actual opening and closing time of the building.

**NOTE:**

In order for reserve items to circulate under the hourly codes, the Hours Open table must be filled in.

For additional information, refer to the Sierra WebHelp: [Hours Open Table](#).

**Item types**

Each distinct type of material or distinct circulation period should be given its own Item Type, so that the library can be as specific as it chooses in creating loan rules. A library may have one Item Type for 2 Hour reserves, another for 3 Hour reserves, and another for 4 Hour reserves. Or they may have 3 Item types for 2 Hour reserves, one with overnight allowed, one without overnight, and one for media which has a higher fine amount. There are 256 Item Types available, so there are many possibilities.

Item Types	
ID	Label
0	Books
1	
2	
3	Books, Reference
4	
5	
6	
7	
8	Periodicals, Unbound
9	Periodicals, Bound
10	
11	
12	
13	
14	Video
15	DVD
16	CD, Spoken
17	CD, Music

An Item Type consists of a numeric code (0-255) and a label (identifying name for the code), e.g. 24:Musical Scores.

For additional information, refer to the Sierra WebHelp: [Maintaining System Parameter Tables](#).

### **Location codes**

Libraries may choose to have a separate reserves location. This would display in the OPAC and would indicate the change of location for items that are normally shelved in one place but are moved to a special location while in a reserve status. A separate location also allows for the possibility that the reserves location may have hours that differ from those of the main library. This would be useful if there were no overnight reserves allowed and the library wanted to ensure that all reserve items are returned before closing. Location codes are maintained in the Branches file.

For information on the Branches file, please see Sierra WebHelp: [Maintaining System Parameter Tables](#).

In the loan rule determiner table, libraries can either specify a location or use a wildcard to allow all locations to use the same loan rule for the specified Item Type.

### **Circulation Options**

There are two circulation options your library can set to control reserves. Both options can be seen in the Admin Corner using the menu path Management >Information>System>Circulation. They can be set to different values using the Additional System Functions menu path.

#### **84 > Reserves: Allow hold cancel in reserve list maintenance?.....NO**

If this option is set to "YES," you can cancel holds on items from the Reserve List Maintenance menu.

For additional information, refer to the Sierra WebHelp: [Reserve List Maintenance](#).

#### **85 > Reserves: Store course reserve history in item and bib records.....YES**

Set to "YES" to have the system add a RESERVE NOTE field to item records when you place them on active reserve. The RESERVE NOTE contains the date the record was placed on active reserve or taken off reserve, and the course name. When the record is taken off active reserve, the RESERVE NOTE field stores the number of times the record circulated.

Please Note:

This option refers only to storing reserve history in items. If the library has requested that Innovative set up the ability to store course history in bibs, and Innovative has completed this set-up, the system option will display as 'Call Innov'. If you choose to add the reserve history to the bibliographic record, you lose the ability to turn this option on and off and would have to contact Innovative to make a change.

As mentioned earlier in this tutorial, you can set the system up to retain the reserve circulation information in the bib and item records. If the Retain Number of Checkouts from Reserve

Circulation feature is enabled, when you remove an item from reserve or change its status to inactive, Sierra Circulation includes the total number of times that the item circulated while it was on active reserve in the item record's TOT CHKOUT fixed-length field. To have this feature enabled, contact Innovative. Keep in mind that items on reserve may circulate far more often than they would when in the regular collection, and this additional activity will be reflected in the TOT CHECKOUT. Circulation statistics will include activity by the reserve Item types and Locations, which will enable the library to see the numbers of circulations for reserve items in the collection.

**NOTE:**

If the library wants the reserve history saved in bibliographic records, Innovative staff can set up the field. See [System Changes Made by Innovative Staff](#)

## Active/Inactive - Changing an Item's Status

To enter Course Reserves function, you must be authorized for functions 48 (Course reserves) and 171 (View course records). To change a record's status, you must be authorized for functions 124 (Update item records) and 174 (Update course records).

You can change the active/inactive status of a bibliographic or item record that is attached to a course record by using one of the following methods:

[Manually retrieving the course record](#)  
[Listing records whose status should change](#)

If you are using the manual retrieval method, select the record you want to work with, right click on the record, and select "Change this item's status". You will then see a box like this:

Course Reserve Setting

Location:  
Jures

Item type:  
54

Display course name as call number

Item status

Active

until end of the course

until - -20

Inactive

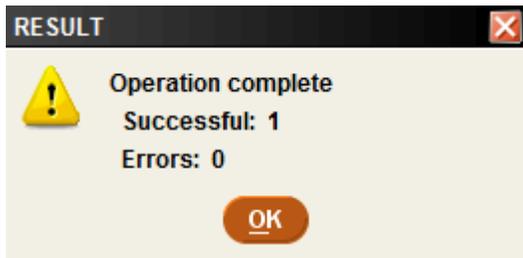
until end of the course

until - -20

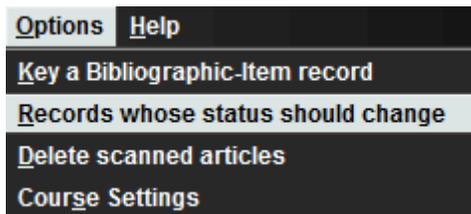
OK Cancel

You can now change the active/inactive status of the record. You can select whether the record should remain active/inactive until the currently set active until date, the end of the course, or a new date. To input a new date, either type "t" for today's date, "c" to call up a calendar, or double click on the date field to call up the calendar and select the date.

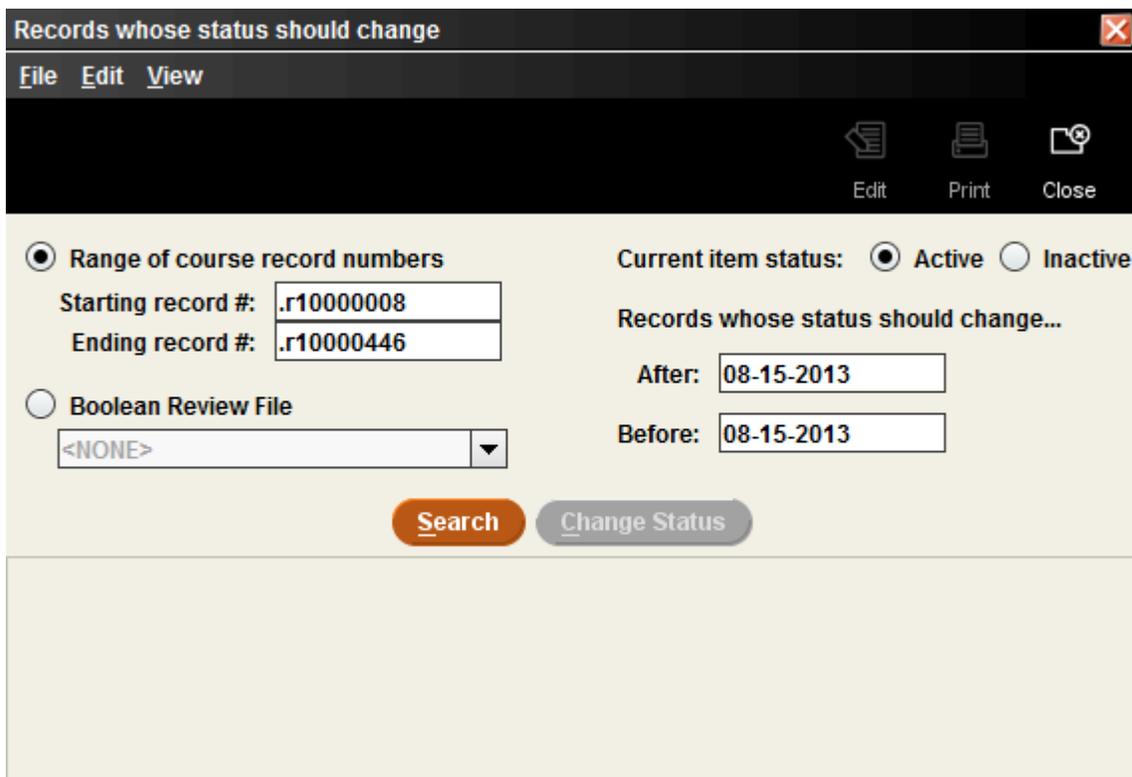
Once you have done this, click on the OK button to make the changes. You will then see a box confirming that the changes have been made:



To use the list of records whose status should change, from the Course Reserves module, select **Options | Records whose status should change**



This will bring up a dialogue box where you can set your options.



You can search for active items that need to be changed to inactive, or inactive items that should be changed to active. Select your date range, and then click Search. From the results list, you can select the items to change, click the Change Status box, and select the date range for the status change to remain effective.

In the Admin Corner, under Circulation Options, one of the options is to Store course reserve history. If you set this to YES, Sierra will add a RESERVE NOTE field to item records when they are placed on active reserve for a course. Sierra can also store this information in the bibliographic record for all attached item records, but this requires Innovative staff assistance. This note contains the date the record was placed on active reserve or taken off reserve, and the course name. When the record is taken off active reserve, the RESERVE NOTE field stores the number of times the record circulated.

The system can be set up to include the reserve circulation statistics in the total checkout field. The Reserve Note field will still be created in the item record, but the checkout information will be combined with regular collection statistics. Innovative staff can also configure your system to record circulation from reserves in a separate field within the bibliographic record.

It should also be noted that courses themselves can be made inactive. If a course is held on a regular basis, it may be easier to keep the course record in the system as an inactive course when the school is between sessions. In order to inactivate a course, all items in the course must be either removed or made inactive. The course is suppressed by changing the setting in the CCODE1, CCODE2, or CCODE3 field to "suppress". Each library is able to select which of the Course Codes they want to be used for suppress purposes, though Innovative must enable the suppression capability.

<b>r10000446</b>				<b>Last Updated: 08-10-2013 07:20AM</b>		<b>Created: 08-09-2013 02:19PM</b>		<b>Revisions: 4</b>	
Beginning Date	08-15-2013	Location	iures Innovative University Reserves	Course Code 2	- ---				
Ending Date	- -	Course Code 1	- ---	Course Code 3	n SUPPRESS				
Professor/Instructor	McClellan, Mike								
Professor/Instructor	Innovative, Instructor								
Course Name/Number	Intro to Systems								
Course Note	An intensive 4 week program designed to prepare the student for general ILS administration								

To reactivate the course, change the "suppress" setting back to a "-" value and you can add item records or reactivate existing item records within the course.

**NOTE:**

For the changes mentioned above that require assistance from Innovative, see [System Changes Made by Innovative Staff](#).

## Searching Course Reserves in Encore/WebPAC

Searching in Encore/WebPAC for items on reserve can be done in multiple ways. Patrons can search the Course Name index, for course name or course number. They can also search the Prof/TA index for the names of any teachers associated with the class. And finally, they can search in the full Encore/WebPAC by any of the access points for the bibliographic record, and find that it is on reserve.

Depending on the design of Encore/WebPAC, patrons can either click on a Course Reserves link, which will bring them to a page that will offer both the course name and professor index link, or they can link directly to the two indexes, as shown here:

encore

Search:



Course Search

<p>Search for:</p> <input type="text"/>	Type as much or as little of the course name or course number as you wish. For example:
<input type="submit" value="Submit"/>	<ul style="list-style-type: none"><li>• MUS 100</li><li>• music appreciation</li><li>• Zoology 201</li><li>• comparative vertebrate anatomy</li></ul>

Searching by course name is made easier if the record reflects a number of different ways that the students may search for it, such as:

CHEM210  
Chemistry 210  
Organic Chemistry 210

By entering a number of course name/number fields in the course record, the library is increasing the likelihood of patrons finding what they are looking for.

Searching by professor or instructor name is more straightforward. If there is more than one instructor for a course, then multiple entries may be added. These entries may also be used to add Teaching Assistant names, if the professor so wishes. Keep in mind that some students may only know the name of the TA, and thus search that way.

If the search only has one match, that course record will open and the items on reserve for that course will display. If there are multiple matches, a browse list will display, and the patron will be able to select the course they are looking for.

### WebPAC Options that affect Course Reserve display

The following are some Web Options that can affect the display of Course Reserves records in Encore/WebPAC. Review these Web Options before making changes.

## **RSRV\_FORMAT**

This option can be set to true if a library wishes to display the format of items that are on reserve. If the option is set to false, then only Title, Author, and Call No. will display. By default, this option is set to true.

## **RSRV\_HEADER**

This option controls what displays at the top of the display of the list of items that are on reserve.

Examples:

```
RSRV_HEADER=Reserves List  
RSRV_HEADER=Materials for this Course
```

## **TABLEPARAM\_RSRV\_BIBS**

This option controls the display parameters of the table showing the items on reserve in the bibliographic display. The data entered in this option is inserted between the <TABLE> and </TABLE> tags. The values for this option must be valid HTML tags. The format of this option may be:

```
TABLEPARAM_RSRV_BIBS=cellpadding="2" cellspacing="20" border="20"
```

This option can vary by scope, if need be.

Within Course Reserves, an item can be suppressed from the normal Encore/WebPAC, but remain visible in a search of the reserves. This is most often done with a personal copy of an item that a professor has placed on reserve, or with individual articles. If a patron searches for the title in the regular Encore/WebPAC, they will not see the record, but if they search within the reserves, they will find the items available.

At the end of a semester, items can be suppressed from view in the reserves by making them inactive. See [Changing an item's status](#).

## **Effect of Changing Courses/bibs to Inactive/Active**

Changing courses or bibs from active to inactive (and vice-versa) will affect how patron's Encore/WebPAC searches turn out. If bibs/items are made inactive within a course record, they will no longer show up when searching under a course record. However, they will show up in the regular, non-reserve section of Encore/WebPAC.

If course records are suppressed, they will not be available in Encore/WebPAC. A professor's name will return no hits, and any items on reserve for that course will not be seen. However, as with inactive bibs/items, the items on reserve for the suppressed course will be returned in searches in the non-reserve section of Encore/WebPAC if they do not contain suppression values.

## Checking Reserves In/Out

Circulating reserves is much like circulating other materials, with the notable exception of the length of the loan period. Many items may circulate for only an hour or two, and those items may or may not be allowed to circulate overnight. This will be discussed later in this section.

Begin in the Circulation Desk Function, and either scan in the patron barcode or search for the patron's name.

Next, scan in the barcode of the reserve item to be circulated. If the item circulates for a period of days, you will see a due date like this:

The screenshot shows the Sierra library system interface. At the top, the title bar reads "Sierra · Sierratrain Master Training Server · III Sierra". Below it is a menu bar with "File", "Edit", "View", "Go", "Tools", "Admin", "Reports", and "Help". The main header area features the "sierra" logo on the left and "FUNCTION Check Out (Circulation ...)" on the right. A search bar contains the text "Key or Scan Item or Patron Barcode" and a "Search" button. To the right of the search bar are icons for "New", "View", "Edit", "Print", and "Close".

Below the search bar is a dark grey box containing patron information:

- Name:** Innovative Student
- Barcode:** 20102220053284
- Expiration Date:** 05-31-2017
- Birth Date:**
- Patron Type:** Undergrad Student
- Email Address:** (with info icon)
- Address:** 5850 Shellmound St, Emeryville, CA 94608

Below the patron information is a summary bar with "Check Out 1" and a "Change Due Date" button. Underneath is a table of checked-out items:

Barcode	Title	Due Date
31307012603710	Blue / Abigail Padgett.	Aug 27 2013

At the bottom left of the interface, there are summary statistics:

- Checked-Out Items:** 1
- Holds:** 0

If the item is on hourly reserve status, you will see a time in the due date field as well:

The screenshot shows the Sierra library system interface. At the top, there is a menu bar with options: File, Edit, View, Go, Tools, Admin, Reports, Help. Below the menu is the Sierra logo and a 'FUNCTION' dropdown menu set to 'Check Out (Circulation ...)'. A search bar contains the text 'Key or Scan Item or Patron Barcode' and a 'Search' button. To the right of the search bar are icons for 'New', 'View', 'Edit', 'Print', and 'Close'. Below this is a patron profile card with the following information:

<b>Name</b>	Innovative Student	<b>Email Address</b>	
<b>Barcode</b>	20102220053284	<b>Address</b>	5850 Shellmound St Emerville, CA 94608
<b>Expiration Date</b>	05-31-2017		
<b>Birth Date</b>			
<b>Patron Type</b>	Undergrad Student		

Below the profile card is a 'Check Out' summary section with a 'Change Due Date' button. It shows 'Check Out' with a count of 1 and 'Checked-Out Items' with a count of 3. Below this is a table of checked-out items:

Barcode	Title	Due Date
38344000012391	Technology and the character of contemp...	Aug 20 2013 06:00PM

Checking out hourly reserves has two factors that must be taken into account. First, they can be set to round to the nearest hour or the nearest minute, and second, they can be set to circulate overnight or not.

If the loan rule is set to allow overnight circulation, the item will be due one hour after opening the following morning. For example:

The library has set their hours in the HOURS OPEN table hours to 8:00am to Midnight, and the item has a two hour circulation period. From 8:00am until 10:00pm, the item will circulate for two hours. Beginning at 10:01pm; however, two hours from the checkout time now falls during a period when the library is closed. This will invoke the overnight part of the loan rule, and the item will be due at 9:00am the next day.

For additional information, refer to the Sierra WebHelp: [How Sierra Calculates the Due Date for a Check-Out](#)

If hourly reserves are set to round to the nearest minute, then an item with a two hour circulation period that is checked out at 2:23pm will be due at 4:23pm. This allows all patrons to get the correct checkout period, no more, no less.

Hourly reserves can also be set to circulate overnight or not. If an item's loan rule does not allow overnight circulation, the item will be due when the library closes. A patron checking out an item with a two hour loan period 45 minutes before closing will only get 45 minutes with that item. However, with this setting, all reserve items will be available in the library at opening

the next day.

In order for hourly reserves to properly circulate, the Hours Open table must be filled in. In the Circulation Module, go to **Admin | Parameters | Circulation | Hours Open** to fill in the table. You can create entries for each location, or you can use wildcards to specify all locations. If the library has different opening hours for different days, you need to create entries for each day. If the library is open the same hours on a number of days (e.g. MON-THU), you can use wildcards to specify any day and then add specific entries for Friday, Saturday and Sunday. The hours are entered in the 24 hour format.

For additional information, refer to the Sierra WebHelp: [Hours Open Table](#)

**NOTE:**

The Hours Open table only needs to be filled in if you are using hourly loans. Otherwise, it is not used.

## Reporting on Reserves

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Course Reserves can provide a wide variety of statistical reports for your library. The following three pages discuss how to retrieve the various reports.

[Records Whose Status Should Change](#)

[Circulation Statistics](#)

[Print a List of Courses](#)

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## Records Whose Status Should Change

Course Reserves allows you to create a batch of records whose status should change from active to inactive, or vice-versa. This can save the library considerable processing time at the beginning and end of each term.

Follow these steps to list records whose active/inactive reserve status should change:

Change the current mode to Course Reserves.

Choose **Options | Records whose status should change** from the dropdown menu.

Sierra will display a screen similar to the following:

Specify the group of records you want to review by selecting one of the following options:

**Choose Range of course record numbers:** Specify a range of course record numbers.

**Boolean Review File:** Select a review file of course records from the drop-down list. You will need to log into the Create Lists function to create or see your review files. Libraries using Course Reserves in a consortial setting, should create review files of the courses belonging to each library separately, based on the location codes, or course codes, or a combination.

Under the **Current Item Status** option, choose to view records whose status is currently Active or Inactive.

Under the **Records whose status should change** option, use the **After** and **Before** boxes to specify the date(s) during which the status of the records should change. To specify a single day, enter the same date in both boxes.

Choose Search to display the records that match the Course Reserves criteria you specified. Sierra will display the matching item and bibliographic records and the following information for each record:

**Course:** The name of the course to which the record is assigned.

**Active Until or Inactive Until:** The date until the record should be active or inactive.

**Call Number:** The record's call number.

**Location:** The location to which the record belongs.

**Recnum:** The record number of the record.

**Title:** The title of the record.

You can perform the following tasks for the displayed records:

View a selected record by choosing **View | Item or View | Bibliographic**, or choose the **View** icon.

Print the table by choosing **Print Table (Standard Printer)** or choose the **Print** icon.

Change the status of the [selected records](#).

When you are finished, choose **File | Close** or the Close icon to return to the previous screen.

## Circulation Statistics

The Circulation Activity reports describe circulation activity on your system over different periods of time. The Checkout report shows an analysis of checkout activity by patron and item codes. These reports are the result of statistical data that are gathered at the point of circulation activity, and allow analysis of a selected period of time.

To access Sierra Web Management Reports, enter the following URL in your Web browser, substituting the IP address of your Innovative system for <IP\_address>: [http://<IP\\_address>/manage](http://<IP_address>/manage)

When you start Web Management Reports, a list of report options appear in the Menu frame on the left. The report options are organized according to module type.

The image shows a vertical menu with five sections, each with a header and a list of items, all on a light blue background. Each item has a small square checkbox to its left.

- USER ACCESS**
  - Patron Searches
  - Web Access
  - E-Reserves
  - User Functions
- CIRCULATION**
  - Circ Activity
  - Cross-Tab
- COLLECTION**
  - Age of Coll
  - Coll Dev
- ACQUISITIONS**
  - Fund Reports
  - Vendor Info
- INN-Reach**
  - Site Activity

To view the Checkout Circulation Statistics report, do the following:

Choose Circ Activity from the Circulation section of the reports menu.

Choose Checkout from the Circ Stats section of the reports menu.

To view report data for a specific time period choose one of the following under the Dates section of the reports menu.

Yesterday

2 days ago

3 days ago

MTD (month to date)

YTD (year to date)

User spec (Select a starting and ending month and year for the report. Enter these dates by choosing the checkbox to the left of the Starting and the Ending months.)

Last mo (last month-When you choose Last mo, the report includes a comparison to the

previous month's activities, and the activity for the same month in the previous year.)  
Other Report

Choose Special under the Locations section of the reports menu. The Special options create one report for up to ten specified item level locations.

Type up to 10 Locations

Submit

iures	ebres

Choose I TYPE from the Type section of the reports menu. Item type displays checkout statistics by item type as defined by the library.

Choose Submit. The results display in table format by default. To choose another format of display, or to download, select the desired format on the toolbar.

**Reports**

Table | Pie Chart | Bar Graph | All | Download | Help

**CIRC STATS**

- All Activity
- Booking
- Checkout
- Filled
- Renewal
- Inhouse
- Hourly
- Owning/Home
- Non-owned
- Title
- Patrons
- Requests

**DATES**

- Yesterday

Recalculate

CIRCULATION (CHECKOUT) STATISTICS		
iures,ebres		
Aug 20 13		
I TYPE	PERCENT	QTY
2 hr Reserve	100.0%	1
Total	100.0%	1

Recalculate

To view the most recent data, choose Recalculate.

To print the Web Management report, choose the appropriate Print option from the File menu in your browser.

For additional information, refer to the Sierra WebHelp: [Using Web Management Reports](#).

## Print a List of Courses

From the Admin Corner menus (non-Sierra) you can print a list of items on Course Reserve AND the number of times those items have circulated. This function has not yet migrated to Sierra. If you do not see this function in your Admin Corner, contact Innovative Interfaces and ask for it to be turned on.

**NOTE:**

For a list of Course Reserve items use Create Lists mode to create a review file of items on Course Reserve (items that contain a COURSE ID field).

To access the file, open a Admin Corner session and enter C > CIRCULATION subsystem > COURSE Reserve List Maintenance > Z Print a list of Courses). In this mode, you can print a list of courses and their associated bibs or items from a review file or a range of records.

Review file: Prior to printing a list of courses from a review file in the Admin Corner you need to create the review file(s).

Printing from a Review File:

Select Z > Print a list of courses

Use a review file? (y/n) Y

Choose a list from the list of review files. If your review file does not contain course records you will get the error message, "The file "[name]" does not contain COURSE records" and be asked to select another review file.

You are then prompted to answer the question "Print list using permanent location code?" (y/n)

Select method of printing.

Printing from a range of records:

Select Z > Print a list of courses

Use a review file? (y/n) N

Enter range of records to be searched

Is the range correct? (y/n) Y

Print list using permanent location code? (y/n)

Select method of printing.

**NOTE:**

The Course Reserves printout is hard-coded and therefore not modifiable. The maximum number of characters printed in any field is 30. You can also print course information directly from a Course record using Sierra.