

Issues & Hints Dealing With Reserve Bookroom

by Kathy Lynch

** To Create/Edit/Withdraw reserve materials/records (Instructor/Course/Title/Item)

Log in to your college's reserve room, or, if you are already logged in to the main college location, *File/Change Location* and select the reserve location for your college.

** Input data consistently (capitalization/punctuation/etc.) for display and searching purposes, according to set practices.

- Reserve *Short Bib Record* creation (consistent data entry required; use fields only as indicated and not for other college specific data; all fields display to the public)
 - Changes to short bib records after the initial save, can only be done by reporting the errors to LTS for correction.
- *Instructors* [Note: Instructor number is system assigned]
 - Need to input instructor records (can be generic to a department, program, etc.); not the same as the borrower record (instructor does not need to have a borrower record in Horizon).
 - Search by instructor using an *, pulls up list of instructors with courses currently on reserve at your location.
 - Instructor record displays the number of titles and the number of courses linked to the instructor.
 - Change display options by clicking on the *Display* button to show additional information, such as the instructor #, comments, etc.
 - Comment field: Enter information specific to the instructor, such as contact information (phone extension, dept./room number, barcode to tie to borrower record, etc.).
- *Courses* [Course number is system assigned]
 - Search Course using the *, pulls up all courses at your location.
 - *Comment*: use for information specific to the course, such as what semesters it is taught (if known), multiple sections, etc.
 - *Group Description*: Use if course is known by more than one name, or leave blank.
- *Title Records*
 - Title specific comments can be entered.
 - View and create items through the title record in Reserve Bookroom.
 - Displays number copies required: # active, # inactive, # provisional (Note: displays total number of copies at ALL locations; not location specific for each category).
 - Uncataloged items within DRA brought over attached to title record(s): *On-The-Fly Records for <campus>rr/general*. These title records list multiple courses, multiple instructors tied to the one generic title for the many actual titles/items attached. Phase out use. Do not add to these records. Redo keepers as time permits?
 - For serial titles, do not attach personal copies of periodical titles to an existing cataloged serial titles with copy records attached. Create an issue specific Short Bib Record for use on Reserve, using set input conventions for the title.

- *Item Records*
 - Need to have a title record linked to a course and instructor before items can be placed on reserve.
 - Highlight the item(s) for your college by selecting more than one item, it assumes that you wish to make a batch change to all items, regardless of location. Suggest selecting the items one at a time to make item specific changes. In most cases avoid making batch changes to the items attached to a title, or at least make sure you are batch changing only your colleges items. Exercise caution.
 - Use *Itypes* specific to reserve room (prefix **rr**) that are based on loan periods.
 - Use *Location* specific to reserve room, not the main location (suffix **rr**).
 - *Collection*: A collection code has been created specific to *reserve rsv*, for those who wish to use it. There might be confusion over the use of *general* for both the Main location and Reserve.
 - Call numbers can be based on shelving conventions while on reserve (by instructor, by course, reserve, etc.) If items are pulled from the main collection and placed on reserve, retain LC call number or change while on reserve to reflect the reserve shelving conventions —Horizon allows for saved values to revert back to those set previously, before the item was placed on reserve.
 - *Copy Statement*: Use for *volume* information. Displays in copy/volume field to the public.
 - *Notes*: Enter notes specific to the item.
 - *On Withdrawal*: Use these codes with caution as some should never be used for library owned materials. Some only apply to non-library owned materials, such as personal copies.
- *Instructor Letters* (Notification of withdrawals from reserve)
 - If there is no withdrawal date for the title, the letters will not print
- *Owner*
 - Assigning an Owner to an item, if different than the Instructor, is possible. I.e. generic instructor for department (Nursing) while owner might be the contact person in charge of the reserves for the department, or an individual instructor (Owner) places a personal copy on reserve for the department (Instructor) to use.

Possible Corrections to imported DRA records:

- Phase out or convert On-The-Fly reserve records. LTS could transfer item(s) between the on-the-fly title record to the new short bib/existing title records once identified
- Review itypes and use those specific to reserve
- Convert to Reserve Collection code?