



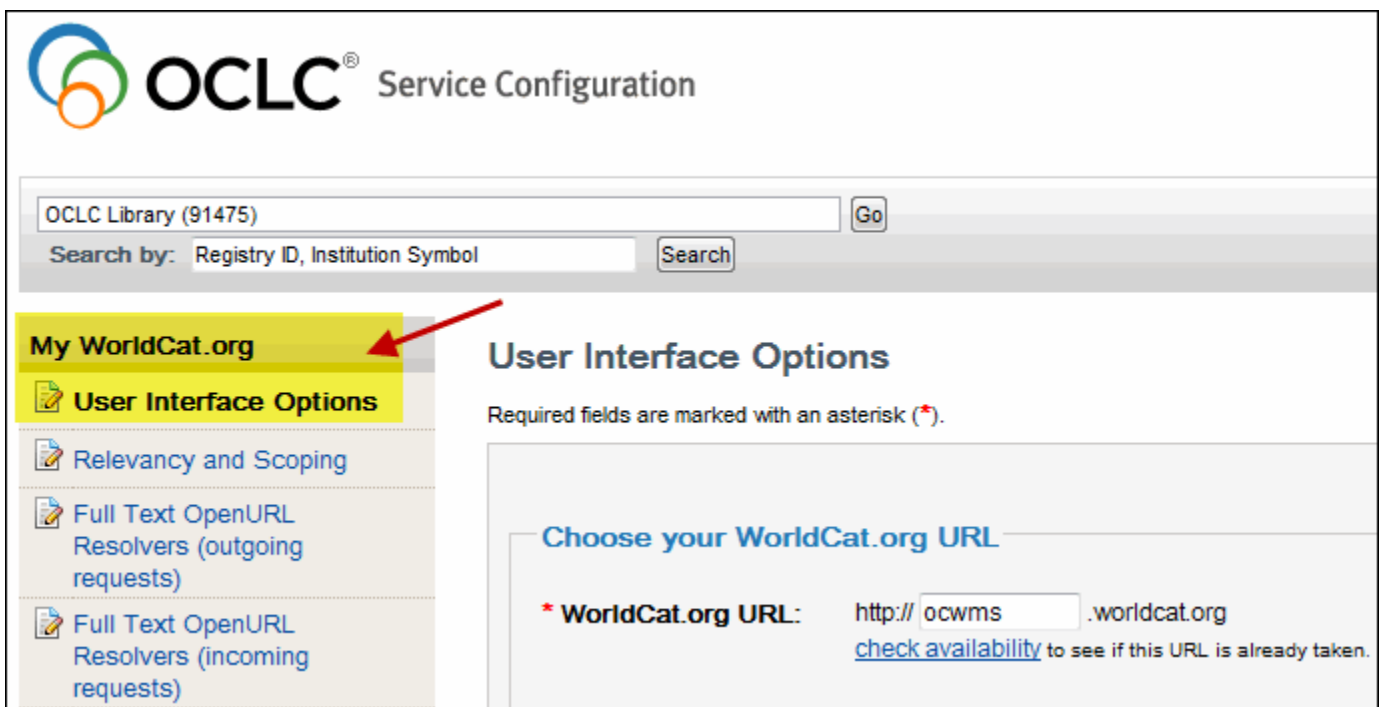
## Course Reserves in WorldCat Local

### Introduction

Course Reserves allows your patrons to search for courses and view reserved materials in your collection. Users can search for courses, by name, code (prefix, number, section), instructor or department.

### Activating Course Reserves

To activate Course Reserves, you must turn on the Course Reserves link in [OCLC Service Configuration](#). The link appears under the **General display settings** heading in the User Interface Options module under **My WorldCat.org**.



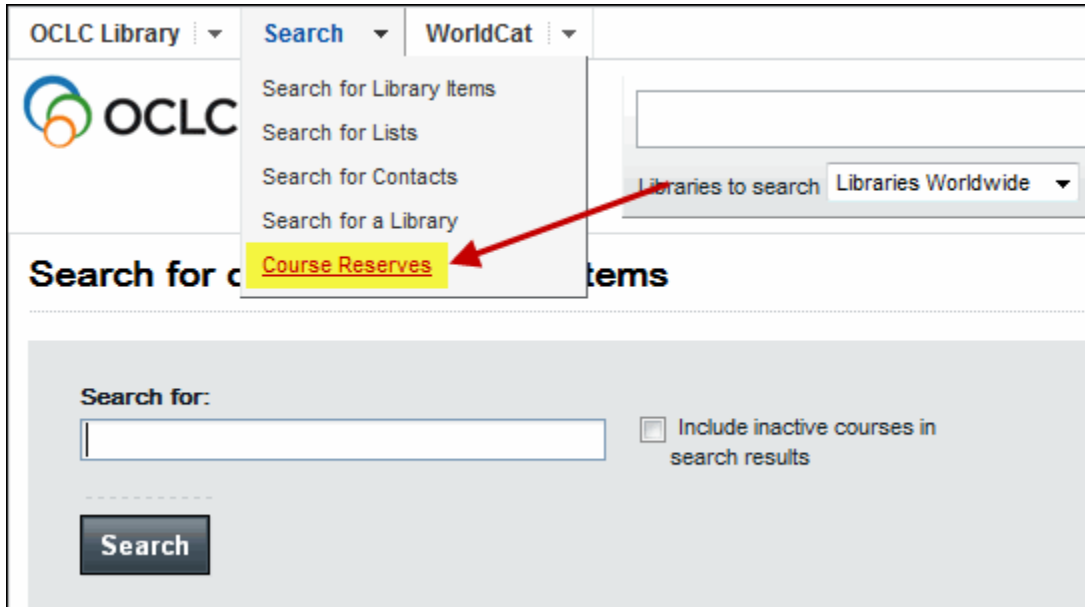
There are two levels of permissions in Course Reserves:

- Manager—create/edit/delete courses and titles in courses
- Maintainer—add/remove titles to existing courses

To create and maintain courses, you will need to sign into your WorldCat account in WorldCat Local. Libraries with access to OCLC Service Configuration will have access to the Manager role in Course Reserves. If you experience any issues logging in, or with your ability to create and/or manage course reserves after logging in, please contact [orders@oclc.org](mailto:orders@oclc.org) for assistance. Please include your institution's OCLC symbol when submitting your request. Similarly, if you would like to request access for other users at your institution, you may also do so by contacting [orders@oclc.org](mailto:orders@oclc.org).

### Accessing Course Reserves

Course Reserves appears under the **Search** drop-down menu in WorldCat Local after it has been activated in OCLC Service Configuration.

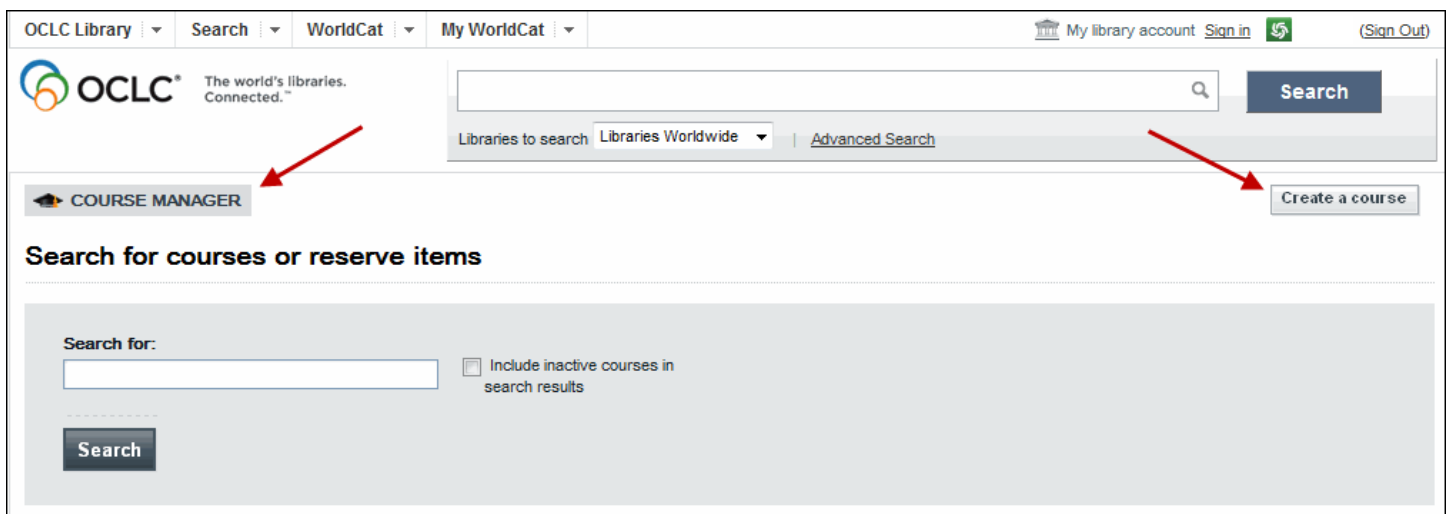


**Note:** If your institution previously used Phase I of Course Reserves, that link disappears once Course Reserves is activated in OCLC Service Configuration.

### Signing in

Sign in using your WorldCat account. If you have Course Manager permissions, the **Course Manager** icon and **Create a course** button appear once you have successfully signed in.

**Note:** This task can only be completed by a Course Manager.



## Searching for courses

Courses may be searched by name, including the course prefix (e.g., ART, CHEM, TECH) and number, instructor name, course description or department.

Step	Action	Result
1	Enter in the search box any terms that are part of a course record.	
2	<b>Optional:</b> Click the check box to include inactive (past or future) courses.	
3	Click <b>Search</b> .	Courses that match your search are displayed. <b>Note:</b> A message appears if no results were found.

From the search results screen, you can:

- Sort the search results by selecting a value from the **Sort by:** drop-down list.
- Click the **Previous** or **Next** links to go to the previous or next page of results, or the **First** or **Last** links to go to the first or last records in the search results.
- Click a course title to go to course details (and see items on reserve for that course).
- Click the links under **Instructor** or **Department** to see all results containing those words anywhere in the course record.
- Click the **Read more** link to see the full course description.

## Creating a course

To create a course:

Step	Action	Result
1	Click <b>Create a course</b> .	The Create a new course screen appears.
2	Enter a course <b>Name</b> and any description/details (see <b>below</b> ) that you want to include.	
3	Click <b>Create Course</b> .	A screen with a confirmation message and links to additional options appears.

### Create a new course fields

Required fields are marked with an asterisk (\*).

Course name and description	
<b>Name*</b>	Course name or title.
<b>Description</b>	Description of the course.
Course details	
<b>Course status</b>	Click the status, either Active or Inactive.
<b>Prefix</b>	Course prefix, if applicable.
<b>Number</b>	Course number, if applicable.
<b>Section</b>	Course section, if applicable.
<b>Instructor(s)</b>	Enter the instructor's first and last name. If there is more than one instructor, click <b>Add an instructor</b> to add more.
<b>Department</b>	Department that the course represents.
<b>Start date/End date</b>	Click the calendar icons to choose start and end dates for the course.
<b>Notes</b>	Any additional notes or information.

## Course Reserves in WorldCat Local

### Editing a course

Step	Action	Result
1	Click <b>Edit or duplicate course</b> .	The Edit or duplicate a course screen appears.
2	Edit any desired fields.	
3	Click <b>Save changes to existing course</b> .	A screen with a confirmation message and links to additional options appears.

### Duplicating a course

Step	Action	Result
1	Click <b>Edit or duplicate course</b> .	The Edit or duplicate a course screen appears.
2	Edit any desired fields.	
3	Click <b>Save changes as duplicate course</b> .	A screen with a confirmation message and links to additional options appears.

### Deleting a course

Step	Action	Result
1	Click <b>Delete course</b> .	A confirmation message appears.
2	Click <b>Yes, remove</b> to remove the item, or <b>Cancel</b> to go back.	A confirmation message appears.

## Adding items to a course

Once you have created the course, you will need to add reserve items.

**Note:** This task can also be completed by a Course Maintainer.

### Adding items

Step	Action	Result
1	Click <b>Add reserve items to this course</b> , or <b>Add items</b> (depending on the screen you are on).	The Add items to course reserve screen appears.
2	Search by keyword for items to add in the search field.	
3	Click <b>search</b> .	Search results appear.
4	<b>Optional:</b> Sort the search results by selecting a value from the <b>Sort by:</b> drop-down list.	
5	<b>Optional:</b> Click <b>Previous</b> or <b>Next</b> to go to the previous or next page of results, or <b>First</b> or <b>Last</b> to go to the first or last records in the search results.	
6	When you find an item you wish to add, click <b>Add</b> .	A confirmation message appears.
7	<b>Optional:</b> Add temporary items (see <a href="#">below</a> ).	

**Note:** Once you add a physical item to a course, you still need to locate the item and place it on reserve using the methods provided by your automated library system. Placing a physical item on reserve usually changes the item's loan period and bill structure while it is associated with the course.

For some systems, placing items in a separate location is required. Other systems may change the item type to "Reserve" or a similar category. You may find it helpful to [print the list](#) of items on reserve for a course, gather the items from the shelves and deal with them appropriately.

### Removing items

Step	Action	Result
1	Click <b>Remove</b> next to an item in your reserve list.	A confirmation message appears.
2	Click <b>Yes, remove</b> to remove the item, or <b>Cancel</b> to go back.	A confirmation message appears.

### Adding temporary items

Temporary items can be any item, not just those found in WorldCat.

Step	Action	Result
1	Click <b>Create temporary item</b> .	The Create a Temporary Item screen appears.
2	Enter a <b>Title</b> and any details (see <a href="#">below</a> ) that you want to include.	
3	Click <b>Create temporary item and add to course</b> .	A screen with a confirmation message and links to additional options appears.

### Temporary items fields

Required fields are marked with an asterisk (\*).

<b>Title*</b>	Title of the item.
<b>Description</b>	Description of the item.
<b>Format*</b>	Choose a format for the item from the drop-down list.
<b>Delete date</b>	Click the calendar icon to

	choose a date of when the item is no longer needed.
<b>Author(s)</b>	Author, if applicable.
<b>Language</b>	Language, if applicable.
<b>Publisher</b>	Publisher name, if applicable.
<b>Publisher Location</b>	Publisher location, if applicable.
<b>Publication Date</b>	Date of publication, if applicable.
<b>Local Call Number</b>	Call number, if applicable.
<b>Electronic link</b>	URL, if applicable.
<b>Series Title</b>	Series title, if the item is part of a series.
<b>Series Enumeration</b>	Volume or issue, if applicable.
<b>Series Chronology</b>	Date of the series, in YYYY/MM/DD format, if applicable.
<b>Series Pages</b>	Number of pages, if applicable.
<b>Notes</b>	Any additional notes or information.

### Printing reserve lists

Step	Action	Result
1	Click <b>Print reserve list</b> .	The Print dialogue box appears.
2	Click <b>Print</b> . <b>Note:</b> Reserves lists can also be printed using the browser <b>Print</b> button.	