DALNET Horizon Course Reserves Task Force
Recommendations
5/23/00

The libraries of five DALNET institutions are currently using the Horizon Course Reserves module: Macomb Community College, Oakland Community College, University of Detroit Mercy, Walsh College, Wayne County Community College, and Wayne State University. Representatives from each library met over a three-month period to discuss their experience with the Horizon Course Reserves module and determine the functionality that should be added to increase the utility of the module.

To meet the needs of DALNET libraries, the Reserves module should be redesigned to:

- Better handle large databases of reserve records
- Improve access to reserves for multi-site and multi-campus libraries
- Provide features required for handling electronic reserves

The specific enhancements suggested by the Task Force are divided into two sections:

- General enhancements that would significantly improve the utility of the Course Reserves module for all material types, including electronic documents
- Enhancements that are specific to electronic reserves.

General Enhancements
Sub-sort on Course and Instructor Indexes
Some instructors (who teach multiple courses) and some courses (taught by multiple instructors) have several hundred items on reserve. Retrieving lists of titles for a specific instructor or course often leaves students with an unmanageable list of titles. Students need the ability to retrieve a specific course and then do a sort on a specific instructor to retrieve only those items on reserve for a specific course/instructor combination. Similarly, students need to be able to retrieve a specific instructor and complete a sub-sort on a course. The ability to further limit by course section is required by larger academic institutions where 50 or more sections of a single course may be taught each term.

Search Across All Locations
Currently, the Reserves module requires searching Horizon by each location. On large campuses with multiple libraries, students are often uncertain which library has the reserve materials that have been assigned. Horizon needs to provide the capability for users to search across locations, in addition to individual locations.

Better Method to Handle Title Deletion
When a title is on reserve for multiple courses or multiple instructors, all entries linked to the title need to be deleted before the title can be successfully removed from reserve for a specific course/instructor combination. The Reserves module needs to be redesigned so that titles can be removed from a specific course/instructor link and remain on reserve for other courses and instructors.

Printable List View of All Titles on Reserve for All Course/Instructor Combinations
Servers and systems go down, and gaining access to a computer in a busy library is
sometimes problematic for students. Having paper-copy lists that can be quickly and
easily generated by library staff who work with reserves is important. To ensure the
availability of printable lists, some DALNET Libraries maintain a database of
course/instructor/title reserves on Excel and similar software. For libraries with large
reserve collections, it requires an enormous amount of duplicate effort to maintain two
separate databases. Other DALNET libraries are experimenting with ReportSmith
reports to generate lists. However, this does not meet the requirements of an easily
generated on-demand list of reserves. The Horizon Reserves module needs to provide a
printable list view of titles on reserve for course/instructor combinations.

Copyright Tracking
In order to comply with copyright law and make decisions about whether reproduced
copyrighted material can be used under one of the "limitation of exclusive use"
subsections of the Copyright Act, or whether permission must be sought from (and
possibly fees paid to) the copyright owner, a course reserves module needs to provide the
ability to track the use of reserves materials. The length of time an item has been on
reserve; whether or not it has been on reserve previously; the number of times it has been
circulated; and clear indications of the date it was put on and the date it must be removed
-- all are potentially important pieces of information when making decisions regarding
copyright issues.

By providing library staff with the option to specify dates for withdrawing materials from
reserve, Horizon partially provides for tracking time period use. But ideally, Horizon
needs to provide the capability for staff to enter much more information about each
reserve item and for the system to retain key information to ensure compliance with the
Copyright Act. In addition, libraries need the ability to link and display copyright
restrictions for individual records to the user, effective for the time that an item is on
reserve. A check-off box for users to confirm that they agree to abide by copyright
restrictions should be provided. These features, combined with tracking and a copyright
"pull list" would help libraries ensure that copyright restrictions are enforced for reserve
collections.

MARC-Based Short Bib
Currently, fields on the Reserves "fast-add" record are modified from the MARC-usage
MQ view. A MARC-based short bib would allow libraries the flexibility to add a full-
range of fields for enhanced searching capabilities.

Enhancements for Electronic Reserves
Provide Security on the Course and Document Levels
The need to maintain restricted access to some reserve materials is common for most
libraries. For example, companies that publish educational tests often lend copies to
institutions with the stipulation that access must be restricted to students enrolled in

specific courses. In a paper-copy environment it is easy to determine which students have access to materials through checking registrar files or other campus resources.

In an electronic environment, the authentication process is more complex. To effectively handle electronic reserves, libraries need the ability to set authorization at the course and document levels by course page password and through the patron file -- specific links to patrons from the Reserve module and by borrower type. Various levels of access (super-user, read-only, add-only, unrestricted, etc.) should also be options.

Electronic Document Submission
Courses offered entirely through the Web or with Web-based enrichment to classroom lectures are becoming more common. Some of the host institutions of DALNET libraries have site licenses to software that makes it easy for instructors to design Web-based lectures and integrate electronic "reserve" links. There are two related areas for which library involvement has been requested:

- Some courses are taught in both Web-based and traditional classroom versions. The same electronic documents are on reserve for both versions of the course and need to be accessible from the Horizon Reserves module.

- Some instructors are requesting library involvement in handling and monitoring copyright permissions and restrictions.

To effectively handle electronic reserves, Horizon needs to provide the capability for instructors to submit documents via e-mail to a queue for final reserve processing by library staff. It should be possible to set security authorizations to provide for varying levels of document submission and modification control by faculty and library staff.

Multiple Format Documents
Students who use electronic reserves need the ability to read a variety of document formats. If a workstation lacks the required viewer, the ability to automatically detect the appropriate viewer and provide the option for downloading freeware (Adobe Acrobat, etc.) or licensed software needs to be provided.

Discussion
The Horizon Course Reserves module is a very basic program with limited functionality. Employees at DALNET libraries find the module difficult to use and learn. That this perspective is shared by other libraries is shown by the numerous complaints about functionality on the HUG Website.

It is the opinion of the DALNET Task Force that the Course Reserves module needs to be re-designed. Adding minor "fixes" to the current module to address miscellaneous problems will not significantly improve the utility of the module to DALNET libraries. The module needs to become more flexible and more sophisticated to effectively address the features of integrated electronic, media, and paper-copy reserve collections.

The Horizon Course Reserves module is especially limited in its ability to handle electronic reserves. There are a number of stand-alone products on the market that provide the functionality to address the needs of libraries with electronic reserve collections. Several DALNET libraries are reviewing these products and one is submitting a purchase proposal. If *epixtech* resources are not available to complete a re-design of the Reserves module, the Task Force recommends that the company should consider purchasing and integrating third-party software into the Horizon product.

(7:course reserves report)