Courses

This section of the documentation contains links to external sites. Please be advised that these sites are not maintained by the FOLIO Documentation Group and may be aligned with a different FOLIO release.

The Courses app allows you to create and manage course reserves.

Note: To enable library patrons to discover the courses you create in the Courses app you need an external interface or discovery layer set up and capable of interacting with FOLIO.

Permissions

You can assign permissions to users in the Users app. The permissions described below allow you to interact with the Courses app and determine what you can and cannot do within the app. If you don't assign any of these permissions to a user, the user will be unable to see the Courses app or any related information.

The following are all the Courses permissions:

- **Courses: Add and edit courses' reserved items.** This permission allows users to add and edit items associated with a course. They cannot remove items from a course.
- **Courses: Add, edit, and remove courses' reserved items.** This permission allows users to view, add, edit, and remove items associated with a course.
- **Courses: All permissions.** This permission allows users to maintain (view, add, edit, and delete) courses, items, instructors, cross-listed courses and all course settings.
- **Courses: Read all.** This permission allows users to see all courses and item information.
- **Courses: Read, add, and edit courses.** This permission allows users to view, add, and edit a course. They cannot delete a course.
- **Courses: Read, add, edit, and delete courses.** This permission allows users to view, add, edit and delete a course.
- **Fast add: Create.** This permission allows users to [Fast add](#) a reserve item to a course.
- **Settings (Courses): Can create, edit and delete course settings.** This permission allows users to maintain (view, add, edit, and delete) all course settings.
- **Settings (Courses): Can view course settings.** This permission allows users to view course settings. They cannot add, edit or delete course settings

Keyboard shortcuts

Keyboard shortcuts allow you to perform actions in this app using the keyboard. See [Platform essentials > Keyboard shortcuts](#) for more information.

Implementation considerations

Before you implement the Courses app, make sure you have completed the following:

- Implemented the Inventory app.
- [Configured your circulation rules.](#)
- Loaded or created users.

If you are configuring the Courses app for the first time, you need first to set up the

following features in the Settings app, if applicable:

- [Terms](#)
- [Course Types](#)
- [Course Departments](#)
- [Processing Statuses](#)
- [Copyright Statuses](#)

Once you configure the above settings, you can:

- [Create courses.](#)
- [Add instructors.](#)
- [Add cross-listed courses.](#)
- [Add reserves to courses.](#)

Integrations

You can choose to integrate the Courses app with these applications:

- EBSCO Discovery Service (EDS)
- VuFind

In addition, you can connect the Courses app to your learning management system using the Learning Tools Interoperability (LTI) protocol. There is a separate module to install for LTI support. For more information, see [Course Reserves - LTI connectivity](#).

Each of these integrations has specific features to consider in regards to the migration of courses, sections, cross-listings, and separate courses and how they interact with FOLIO.

Searching for courses

You can search for courses in the **Search & filter** pane. All courses are shown and selected by default. To search for courses, enter your search terms into the box. Select the **All fields** drop-down list to search through one of the following fields: Course name, Course code, Section, Instructor, Registrar ID, and External ID. All fields is the default search.

You can also search for courses by selecting any of the filters in the **Search & filter** pane: Department, Course type, Term, and Location. Additionally, you can apply the filters after you perform a search to limit your results.

You can choose which columns appear in your search results by clicking on the **Actions** menu. Under **Show columns**, check or uncheck columns to change what you see in the results pane.

Searching for reserves

You can search for items on reserve in the **Search & filter** pane. Click **Reserves** to start your search. All reserves are shown and selected by default. To search for reserves, enter your search terms into the box. Select the **All fields** drop-down list to search through one of the following fields: Title, Barcode, or Call Number. All fields is the default search.

You can also search for reserves by selecting any of the filters in the **Search & filter** pane: Processing status, Copyright status, Permanent location, Temporary location, and Term. Additionally, you can apply the filters after you perform a search to limit your results.

You can choose which columns appear in your search results by clicking on the **Actions** menu. Under **Show columns**, check or uncheck columns to change what you see in the results pane.

Use the **Search & filter** pane to find items on reserve for a specific course. [Find the course](#) you wish to view reserves for and click on it in the **Courses** list. Then scroll

down to the Items section to see all the items on reserve for that course.

Creating a course

To create a course, you must have the Courses window open. Then:

1. Click **Actions > New**.
2. In the **Create course** window, enter a **Course Name** and select a **Term**. All other fields are optional.
3. Click **Save & close**.

Creating a course - reminders

- Once a course is created, it can only be deleted if all reserve items are removed.
- Department, Course Type, and Term are configured in Settings. See [Settings > Courses](#) for more information.
- If you are adding one or more cross-listed courses to a course, the information you enter into Course listing information also applies to each cross-listed course.
- Reserve items added to the course are automatically assigned with the Start Date and End Date of the Term you selected, as specified in the [Term settings.](#) If needed, you can edit the dates by [editing the reserve item.](#)
- Any item assigned to a Course automatically has its temporary location set to the value specified in the Location field. If needed, you can change the temporary location by [editing the reserve item.](#)
- When completing the course information, make sure you understand how the fields correspond to your discovery interface.

Editing a course

1. [Find the course](#) you want to edit and click on it in the **Courses** list.
2. In the **course details** window, click **Actions > Edit**.
3. Make your desired changes to the course and click **Save & close**.

Deleting a course

To delete a course, you must first remove all items from the course.

1. [Find the course](#) you want to delete and click on it in the **Courses** list.
2. In the **course details** window, click **Actions > Edit**.
3. Click **Delete**.
4. Click **Really delete** to delete the course. The course is deleted and removed from the Courses list.

Adding a cross-listed course

Cross-listed courses share instructors, course listing information, and reserve items. Once a course is created, you can add cross-listed courses to it. When you cross-list a course, the information you have in the original course's Course listing information section also applies to the cross-listed course.

1. [Find the course](#) you want to add a cross-listed course to and click on it in the **Courses** list.
2. In the **course details** window, click **Actions > Crosslist**.
3. In the **New course within listing** window, enter a **Course name** and optionally fill in the other boxes under **Basic course information**. The **Cross listing information** section is populated with information from the original course.
4. Click **Save & close**. The course is saved and appears in the Cross-listed courses section of the original course. It also appears in the main course list.

Editing a cross-listed course

See Editing a course.

Deleting a cross-listed course

You are able to delete a cross-listed course with items as long as one course remains.

1. Find the cross-listed course you want to delete and click on it in the **Courses** list.
2. In the **course details** window, click **Actions > Edit**.
3. Click **Delete**.
4. Click **Really delete** to delete the course. The course is deleted and removed from the Courses list.

Duplicating a course

1. Find the course you want to duplicate and click on it in the Courses list.
2. In the **course details** window, click **Actions > Duplicate**. A pop-up window will appear.
3. In the pop-up window, select the term for the duplicate course.
4. If the course has cross-listings, and you want the cross-listed courses to be duplicated also, check **Duplicate all cross-listed courses**.
5. Click **Create duplicate course(s)**.

The new duplicated course will appear, with "- Duplicate" added to the end of the course name. Click **Actions > Edit** to edit the course to update the name and other information.

Adding an instructor to a course

Instructors can only be added once a course is created. The instructor does not need a user record in FOLIO, but adding an instructor with a user record facilitates reports.

Add an instructor that has a FOLIO user record:

1. Find the course and click on it in the **Courses** list.
2. Under **Instructors**, click **Add instructor**.
3. In the **Add instructor** window, click **Look up user**.
4. In the **Select User** dialog, find the instructor you want to add, and click on them in the **User Search Results** list. The instructor's name and barcode appears in the Name and Barcode boxes.
5. Click **Save & close**. The instructor appears in the Instructors section.

Add an instructor that does not have a FOLIO user record:

1. Find the course and click on it in the **Courses** list.
2. Under **Instructors**, click **Add instructor**.
3. In the **Name** box, enter the instructor's name.
4. Click **Save & close**. The instructor appears in the Instructors section.

Editing an instructor

Note: If an instructor has a FOLIO user record, you cannot edit that instructor's information.

1. Find the course and click on it in the **Courses** list.

2. Under **Instructors**, find the instructor you want to edit.

3. Click the **pencil icon**.

4. In the **Add instructor for [course]** window, edit the **Name** or **Barcode** of the instructor.

5. Click **Save & close**.

Deleting an instructor

1. Find the course and click on it in the **Courses** list.

2. Under **Instructors**, find the instructor you want to delete.

3. Click the **trash icon**. The instructor is removed from the course.

Adding and removing notes

You can add and assign notes to courses. Assigning a note means you are reusing a previously created note. To be able to add or assign notes, you need the appropriate Notes permissions.

Adding a new note to a course

1. Find the course and click on it in the **Courses** list.

2. In the **Notes** pane, click **New**.

3. In the **New note** window, select the **Note type** from the drop-down list.

4. Enter a **Note title** in the box.

5. (Optional) Enter any **Details** about the note in the box.

6. Click **Save & close**.

Assigning an existing note to a course

1. Find the course and click on it in the **Courses** list.

2. In the **Notes** pane, click **Assign/Unassign**.

3. In the **Assign / Unassign note** dialog, search for the note(s) you wish to assign to the course.
   1. You can search by title or description in the box.
   2. You can filter by **Note type**.
   3. The **Note assignment status** refers to whether the note is assigned or unassigned to the course you have open.

4. Select the checkbox for the note(s) you wish to assign to the course and click **Save**.

Editing an existing note on a course.

1. Find the course and click on it in the **Courses** list.

2. In the **Notes** pane, find the note you wish to edit and click **Edit**.

3. Make your desired changes to the note.

4. Click **Save & close**.

If the note is assigned to multiple courses, any edits will apply to the note for all of its assigned courses. If you want to make a note with edits that apply just to the open course, you would need to make a new note with the desired text.

Unassign a note from a course.

1. Find the course and click on it in the **Courses** list.

2. Under **Notes**, click **Assign / Unassign**.

3. In the **Assign / Unassign note** modal, select assigned in the **Note assignment status** filter.

4. Uncheck the box(es) for the note(s) you wish to unassign.

5. Click **Save**.

You cannot unassign a note that is assigned to only one course - delete the note instead.

Deleting a note

1. [Find the course](#) and click on it in the **Courses** list.
2. Under **Notes**, click the note you wish to delete.
3. In the Note window, click **Actions > Delete**.
4. In the Delete note dialog, click **Delete**. The note is deleted and removed from any records to which it was attached.

Adding a reserve item to a course when the item exists in Inventory

1. [Find the course](#) and click on it in the **Courses** list.
2. In the **Items** section, either scan the item barcode into the box, or enter the barcode and click **Add item**. The item is added to the course and appears in the Items section.

Note that when you put an item on reserve for a course, FOLIO copies information from Inventory into the reserve record in order to support searching within the Courses app.

This means that if any information about that reserve item changes in Inventory after it was put on Reserve, you may need to remove and re-add the item record to bring over the information into the Courses app.

Information that is copied to support searching includes:

- Title and contributor from the instance record
- Barcode, permanent location, call number, volume, copy, enumeration, and electronic access link from the item record

A reserve item's start date and end date are maintained in the Reserve app. FOLIO will update the item's temporary location in inventory when you first add it on reserve, based on the location listed on the course record.

See [Editing a reserve item](#) for how to change the temporary loan type.

Adding a reserve item to a course using Fast Add

If you have the **Fast add: Create** permission, you can use Fast Add to create an item in the Courses app and put it on reserve. The Fast Add option prompts you to create an instance, holding, and item in one pane with fewer fields. When you create the item, the Courses app creates the instance, holding, and item in Inventory for you, and then adds the item to the course.

The Fast Add workflow is meant to support putting personal copies, scanned articles, or other items on reserve that are not part of the library's general circulating collection.

1. From the associated course, scroll to the bottom and click **Add Fast Add item**.
2. From the New fast add record, fill in the Instance, Holdings, and Item sections with the appropriate values.
3. Once you have included all of the information needed for the item, click **Save and close** to create your inventory records and add the item on reserve for the course.

Note that Fast Add is not usually appropriate for re-adding an item to a course since it will create duplication of records in Inventory. If you need to re-add an item, you should use the function to add an item by barcode.

Editing a reserve item

Note: If you add an item to a course and later make a change to that item via the item record (in the Inventory app), the change will not be reflected in the reserve record. To update the course reserve record, you need to delete the item and then re-add the item to the course.

Editing a reserve item allows you to change or add information to the following fields:

- **Temporary location.** If you change the reserve item's temporary location, once you save the changes, the selected Temporary location is added to the Item record in the Inventory app.
- **Temporary loan type.** If you change the reserve item's temporary loan type, once you save the changes, the selected Temporary loan type is added to the Item record in the Inventory app.
- **Processing status.** This field only applies to the Courses app and is available as a Reserves search filter.
- **Start Date and End Date.** When an item is placed on reserve, the start and end dates are inherited from the selected Term.
- **Copyright information.** This section facilitates copyright tracking.

1. Find the course with the item you want to edit and click on it in the **Courses** list.
2. In the **Items** section, find the reserve item and click the **pencil icon**.
3. In the **Item title** window, make your changes.
4. Click **Save & close**. The item is updated.

Managing copyright information on a reserve record

Each reserve item contains a section to track copyright information. This allows libraries that need to track this information to keep it as part of the reserve for later reporting and payment purposes.

The most common use case for these fields is when an electronic item is put on reserve, but there is no built-in restriction on using it for other items. There are no automated workflows that use these fields. They are all optional.

- **Copyright status**. This is a drop-down. Your library can configure the drop-down values in **Settings > Courses**.
- **Total number of pages in item**. Since most copyright tracking is on scans of physical items, you can track the pages for the entire item here.
- **Total number of pages used**. With this field, you can track the number of scanned pages as part of the reserve.
- **Total % of pages used**. This number must be calculated by the library staff member. Libraries that owe copyright payment can in some cases determine what they owe based off of the percentage of the work used.
- **Payment based on**. This is a free-text field. Most libraries will put one of two values - **Usage** or **Enrollment**.
- **Additional sections of this item used**. For some items, libraries will put multiple scans from the same book on reserve - for example, a book with ten scholarly articles, of which three articles are scanned and put on reserve as distinct items. In those cases, libraries can check this box to indicate that the items should be linked together in order to facilitate proper copyright payment calculation.

Removing a reserve item from a course

Note: Removing an item from a course does not remove it from the Inventory app. If the item on reserve had a temporary location inherited from the course, removing the item from the course will remove the temporary location from the item in inventory. If the item had a temporary loan type inherited from the course, removing the item from the course will **not** remove the temporary loan type from the item in inventory.

1. Find the course with the item you want to remove and click on it in the **Courses** list.

2. In the **Items** section, find the reserve item and click the **trash icon**. The item is removed.

3. If you added a temporary loan type, remove the temporary loan type in the inventory app. Alternatively, use **Bulk Edit** to clear temporary loan types at the end of the semester.

Last modified June 27, 2024