Copyright management

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Learning objectives

For libraries in the United States, after completing this course, you should be able to:

• Configure copyright management options
• Track copyright compliance for ILL requests requiring royalty payments
• Interpret the copyright queue
• Select the appropriate option in the copyright clearance section of a request
• Use Tipasa copyright reports
U.S. copyright: CCG and CCL

• CCG: Complies with Copyright Guidelines
  – Your library does not subscribe to the journal AND the publication date is within the last 5 years
  – With CCG, you should request only 5 copies per title in a year

• CCL: Complies with Copyright Law
  – Your library subscribes to the journal OR the publication date is more than 5 years ago
  – No limit on number of copies you can request under CCL
Copyright management features

- View copyright clearing in separate queue, if desired
- For copy requests for publication date within last 5 years:
  - Match to previously borrowed titles and track times used
  - Mark as:
    - CCG (cleared for fair use)
    - Clear with fee payment required (CCG) (obtain cost from CCC)
    - Other
- View and export copyright information by title, edit copyright usage and view and export data about payable copyright fees
Copyright management

- Without copyright management
- With copyright management turned on
Copy requests can be “automatic”

- If request matches an applicable automation…
- And a Proven Sender fills the request using Article Exchange…
- Then patron is notified and can access article in My Account
- Without intervention by borrowing library
- (and for CCG requests, use count for that title will be automatically incremented, if there is a valid issue date in the request)
Copyright Compliance statement:

The copyright law of the United States [Title 17, United States Code] governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the reproduction is not to be used for any purpose other than private study, scholarship, or research. If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use," that use may be liable for copyright infringement.

☐ I acknowledge that I have carefully read and understand the copyright compliance statement above.

Proceed
Copyright queue

3 CCG requests for this title this calendar year. Of those 3, 2 have been filled; 1 is pending.

Request does not match title in your copyright table (e.g., no ISSN or OCLC # in request)
Copyright matching

• Tipasa attempts to match copy requests to records in your library’s copyright table using ISSN and OCLC number

• If request contains neither ISSN nor OCLC number:
  – In copyright queue > Used column, ? displays
  – In copyright section of request, message displays: “This request has neither ISSN nor OCLC # for copyright matching.”

• If no matches or multiple matches:
  – In copyright queue > Used column, ? displays
  – In copyright section of request, message displays: “No previously borrowed journal matches found.”
No match found

No ISSN nor OCLC #
Check for similar previously borrowed titles

Select a Matching Journal

Performance Improvement Quarterly

No results

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN</th>
<th>OCLC Number</th>
<th>Times Used</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No results</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create New Title

Close
Search WorldCat to find OCLC # or ISSN

Expert search:
Title phrase = Performance improvement quarterly
<table>
<thead>
<tr>
<th>Title</th>
<th>Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Improvement Quarterly</td>
<td>Not Held by my library</td>
</tr>
<tr>
<td></td>
<td>State Holdings</td>
</tr>
<tr>
<td></td>
<td>Regional Holdings</td>
</tr>
<tr>
<td></td>
<td>All Holdings (792)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance Improvement Quarterly</td>
<td>Not Held by my library</td>
</tr>
<tr>
<td></td>
<td>State Holdings</td>
</tr>
<tr>
<td></td>
<td>Regional Holdings</td>
</tr>
<tr>
<td></td>
<td>All Holdings (154)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Apply data to request

173703487
Request now has ISSN & OCLC #
Request now matches previously requested title
Make copyright clearance selection

Matched on OCLC # and ISSN

So far this year, used less than 5 times, so no payment required

Therefore, staff marks as Clear for Fair Use (CCG)
Another title-matching example

ISSN in request

Title not used

Click to create new title in your library’s Copyright Titles table
Create new title

Select a Matching Journal

Art history

0141-6790

Create New Title

No results

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN</th>
<th>OCLC Number</th>
<th>Times Used</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No results</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Close
Another title-matching example

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN</th>
<th>OCLC Number</th>
<th>Times Used</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal of transportation engineering</td>
<td>0733947X</td>
<td>8674831</td>
<td>2</td>
<td>Select as match</td>
</tr>
</tbody>
</table>

Potential match

Click to confirm match
Use count 5+

When a title’s use count is 5+, number has orange background
Other copyright clearance options

- Clear for Fair Use (CCG)
- Clear with fee payment required (CCG)
- Other

Copyright Compliance:
- CCG: Conforms to CONTU Guidelines
- CCL: Conforms to U.S. Copyright Law
- None

Cancel request and do not clear: Cancel Request
Copyright clearance accordion for copy requests with issue date more than 5 years ago

(not included in use count)
Copyright counts updated automatically

If you change copyright compliance, counts automatically update (in copyright queue and individual requests)
Copyright Titles
Includes both filled and unfilled requests marked CCG, “CCG with fee payment required”, or “other”

<table>
<thead>
<tr>
<th>Copyright Title</th>
<th>LC Number</th>
<th>Fair Use</th>
<th>Will Pay</th>
<th>Other</th>
<th>Total</th>
<th>Fees</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>American anthropologist</td>
<td>0002-7294; 1548-1433</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>$0.00</td>
<td>View</td>
</tr>
<tr>
<td>Dictionary of American biography</td>
<td>756804</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>$0.00</td>
<td>View</td>
</tr>
<tr>
<td>English journal</td>
<td>0013-8274; 2161-8856</td>
<td>2</td>
<td>4</td>
<td>0</td>
<td>6</td>
<td>$15.40</td>
<td>View</td>
</tr>
<tr>
<td>IEEE transactions on signal processing : a publication of the IEEE Signal Processing Society</td>
<td>1053-587X; 1941-0476</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>6</td>
<td>$34.50</td>
<td>View</td>
</tr>
<tr>
<td>Journal of the American Chemical Society</td>
<td>0002-7863; 1943-2964; 1520-5126</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>$0.00</td>
<td>View</td>
</tr>
<tr>
<td>Performance improvement quarterly</td>
<td>0898-8952; 1937-8327</td>
<td>5</td>
<td>2</td>
<td>0</td>
<td>7</td>
<td>$83.00</td>
<td>View</td>
</tr>
</tbody>
</table>
## Copyright Titles: view details

### Manage Copyright: Title Usages

- **Title**: Performance improvement quarterly
- **ISSN**: 0898-5952, 1937-8327
- **OCLC Number**: 17858576

### Copyright Fees Total: $83.00

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Committed Date</th>
<th>Issue Date</th>
<th>Permission Type</th>
<th>Number of Pages</th>
<th>Fee</th>
<th>Batch Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>169156232</td>
<td></td>
<td></td>
<td>Fair Use</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>173703617</td>
<td></td>
<td>2015</td>
<td>Fair Use</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>177879629</td>
<td></td>
<td>2014</td>
<td>Fair Use</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>177879709</td>
<td></td>
<td>2015</td>
<td>Fair Use</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>177879801</td>
<td></td>
<td>2013</td>
<td>Fair Use</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>177879926</td>
<td>05/15/2017</td>
<td>2015</td>
<td>Will Pay</td>
<td>20</td>
<td>$41.50</td>
<td>Payments-2017-06-17</td>
<td>Edit</td>
</tr>
<tr>
<td>177927031</td>
<td></td>
<td>2014</td>
<td>Will Pay</td>
<td>23</td>
<td>$41.50</td>
<td></td>
<td>Edit</td>
</tr>
</tbody>
</table>

Results 1 - 7 of 7

Rows: 10
Copyright Titles: Edit copyright usage

<table>
<thead>
<tr>
<th>Request ID</th>
<th>177927831</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pages</td>
<td>59-81</td>
</tr>
<tr>
<td>Issue Date</td>
<td>2014</td>
</tr>
<tr>
<td>Permission Type</td>
<td>Will Pay</td>
</tr>
<tr>
<td>Number of Pages</td>
<td></td>
</tr>
<tr>
<td>Fee</td>
<td>41.50 USD</td>
</tr>
</tbody>
</table>

[View copyright fees and permissions](#)
Copyright Fees Payable

Only filled requests marked “CCG with fee payment required” which have not yet been added to a payment batch
Create payment batch

Manage Copyright: Committed Payments

Committed Copyright Payments Total $15.40

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Title</th>
<th>ISSN</th>
<th>OCLC Number</th>
<th>Issue Date</th>
<th>Page Count</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>173779477</td>
<td>English journal</td>
<td>0013-8274; 2161-8895</td>
<td>1325886; 3536493</td>
<td>2015</td>
<td>7</td>
<td>$3.85</td>
</tr>
<tr>
<td>173780377</td>
<td>English journal</td>
<td>0013-8274; 2161-8895</td>
<td>1325886; 3536493</td>
<td>05/01/2015</td>
<td>1</td>
<td>$3.90</td>
</tr>
<tr>
<td>173781091</td>
<td>English journal</td>
<td>0013-8274; 2161-8895</td>
<td>1325886; 3536493</td>
<td>09/2014</td>
<td>1</td>
<td>$3.80</td>
</tr>
<tr>
<td>173831569</td>
<td>English journal</td>
<td>0013-8274; 2161-8895</td>
<td>1325886; 3536493</td>
<td>November 2013</td>
<td>7</td>
<td>$3.85</td>
</tr>
</tbody>
</table>

Results 1 - 4 of 4
### Manage Copyright: Payment Batches

<table>
<thead>
<tr>
<th>Batch Name</th>
<th>Created Date</th>
<th>Number Paid</th>
<th>Total Payment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments-2017-02-24</td>
<td>02/24/2017</td>
<td>4</td>
<td>$15.40</td>
<td><img src="download.png" alt="Download" /></td>
</tr>
<tr>
<td>Payments-2017-02-20</td>
<td>02/20/2017</td>
<td>4</td>
<td>$137.25</td>
<td><img src="download.png" alt="Download" /></td>
</tr>
</tbody>
</table>

Results 1 - 2 of 2

Export as CSV
### Payment batch formatted in Excel

<table>
<thead>
<tr>
<th>REQUESTID</th>
<th>TITLE</th>
<th>ISSN</th>
<th>OCLCNUMBER</th>
<th>ISSUEDATE</th>
<th>PAGECOUNT</th>
<th>FEES</th>
<th>CURRENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>173779477</td>
<td>English journal</td>
<td>0013-8274, 2161-8895</td>
<td>1325886, 3536493</td>
<td>2015</td>
<td>7</td>
<td>$3.85</td>
<td>USD</td>
</tr>
<tr>
<td>173780377</td>
<td>English journal</td>
<td>0013-8274, 2161-8895</td>
<td>1325886, 3536493</td>
<td>5/1/2015</td>
<td>1</td>
<td>$3.90</td>
<td>USD</td>
</tr>
<tr>
<td>173781091</td>
<td>English journal</td>
<td>0013-8274, 2161-8895</td>
<td>1325886, 3536493</td>
<td>Sep-14</td>
<td>1</td>
<td>$3.80</td>
<td>USD</td>
</tr>
<tr>
<td>173831569</td>
<td>English journal</td>
<td>0013-8274, 2161-8895</td>
<td>1325886, 3536493</td>
<td>Nov-13</td>
<td>7</td>
<td>$3.85</td>
<td>USD</td>
</tr>
</tbody>
</table>
Quiz & simulation tips

In most web browsers, you can

• Press Ctrl and + to make the display bigger
• Press Ctrl and – to make the display smaller
Simulation tips

If you’re not sure what to do next, many simulation screens have a Hint button at the top.
Simulation and quiz

• If you are participating in a live online class
  • See clickable links in Webex chat panel
  • When you have finished the simulation, please click the smile reaction from the bottom of the screen
  • If you finish early, also try the Quiz
  • To open chat panel, click the button at the bottom right of the screen

• If you are viewing a recording
  • Pause the recording (use button at bottom of screen) to do the simulation and quiz
  • See clickable links in Webex chat panel
  • To open the chat panel, click the button in the upper right corner
Proven senders enhancement

• Available since October 23, 2023
• Enable Proven Senders to automatically receive copy requests from all suppliers
• See release notes for more information
Documentation and training

Or directly at https://help.oclc.org/Resource_Sharing/Tipasa
Community Center

• Discussions with Tipasa users in other institutions
• News and events
• Search enhancement requests or contribute your own
Thank You!

When you exit from WebEx, you will automatically be directed to an evaluation form:

- **Instructor**: Rick Newell
- **Class name**: Copyright Management

Training questions (what’s covered in a class, etc.)?
Contact Rick Newell

[newellr@oclc.org](mailto:newellr@oclc.org) or 1.800.848.5878