Digitization and Copyright

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Agenda

• Questions to Consider First
• Copyright Considerations
• Digitization and Copyright Workflows and Tracking
• Additional Copyright Options
• Alternate Copyright Workflows
• Additional Resources
What we won’t cover …

• Integrations with regional copyright agencies
• What your institution must do to manage copyright
• Questions to Consider First
• Copyright Considerations
• Digitization and Copyright Workflows and Tracking
• Additional Copyright Options
• Alternate Copyright Workflows
• Additional Resources
Questions to Consider First

• What do you want to do or need to do related to copyright?
• Which steps do you want to automate, and which do you want to do manually?
• Do you want instructors to be able to request copyright review?
• Do you want instructors to be able to request digitization?
Agenda

• Questions to Consider First

• Copyright Considerations
  • Determine which citations require copyright review
  • Track fair-use or fair-dealing decisions made by instructors

• Digitization and Copyright Workflows and Tracking

• Additional Copyright Options

• Alternate Copyright Workflows

• Additional Resources
Determine Which Citations Require Copyright Approval

• Configure the default copyright status for reading list citations

• Set separately for repository (digital, electronic, or physical), CDI, non-repository, and brief citations.
Workflow Implications

• Maps to the “Copyright Status” field for each citation
• Use this to flag citations that require copyright approval, or indicate those that don’t
• Citations can be filtered based on the Copyright Status field
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  • Determine which citations require copyright review
  • Track fair-use or fair-dealing decisions made by instructors
• Digitization and Copyright Workflows and Tracking
• Additional Copyright Options
• Alternate Copyright Workflows
• Additional Resources
Track Fair-Use and Fair-Dealing Decisions Made by Instructors

- Instructors make copyright declaration when they upload a file
- Configure copyright options for instructors
- Instructor-facing text is fully customizable by the institution

Configuration > Leganto > List Management > File Upload Copyright Options
Workflow Implications

• Alma tracks that the instructor said use is OK
• Optional: Citations can be marked as complete automatically if Self Declared or Fair Use
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• Questions to Consider First
• Copyright Considerations

• Digitization and Copyright Workflows and Tracking
  • Understand Which Resources Need Digitization
  • Understand Which Resources Require Copyright Approval
  • Leverage Digitization and Copyright Rules
  • Process and Track Copyright Approvals
  • Process Digitization Requests
Instructor Requests Digitization

- Instructor submits course-related digitization request in Leganto
- Copyright approval may be required, depending on digitization and copyright approval rules
- Instructor and the library can view the copyright approval status
Library Staff Requests Digitization

• Library staff submits course-related digitization request in Alma

From Citation: Manage Fulfillment Options > Place Request > Request Type: Library Physical Digitization Request

• Instructor and the library staff can view the copyright approval status

• Copyright approval may be required, depending on digitization and copyright approval rules
Digitization and Copyright Requests on Task Lists

• Other Requests – Digitization Requests - approval

• Citations–copyright waiting for approval
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Instructor Asks for Copyright Clearance

• Possible to have copyright clearance not related to digitization (already have file)
• Can be done as standalone, or in addition to the fair use/fair dealing declaration
• Triggered when they select an option requiring copyright clearance
Alma Tracks Copyright Clearance Request

- Checks against rules to approve or not
- Library sees status on citation in Alma
- Instructor sees status in Leganto
- Added to task lists:
  - Citations—copyright waiting for approval
  - Requests—Digitization Requests - approval
Library Indicates Copyright Clearance Required

- Edit Citation - view copyright attributes tab
- Check box: Copyright Auditing Required
- Save (to go back to citation and have someone else approve), or Save and Manage Approval (to navigate approval workflow)
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• Questions to Consider First
• Copyright Considerations

• **Digitization and Copyright Workflows and Tracking**
  • Understand Which Resources Need Digitization
  • Understand Which Resources Require Copyright Approval
  • **Leverage Digitization and Copyright Rules**
    • Process and Track Copyright Approvals
    • Process Digitization Requests
Digitization and Copyright Rules - Overview

- Automate (to some extent) the process of evaluating whether use of a resource complies with fair use/fair dealing
  - Example: Less than 10% of the work
  - Example: First article from this Journal/issue for this course

- Build rules to flag items that can be approved automatically
  - Example: First article from this Journal/issue for this course

- Rules will be used for copyright approval workflows (related to digitization and not)
- Alma will check against these rules in order until it finds one that applies to the situation. If none, default rule will apply.
### Digitization Workflow Rules List

<table>
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<th>Description</th>
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<td>DCS block - Publishers with special license</td>
<td>DCS block - Publishers with special license</td>
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<tr>
<td>Block request when CLA Check Permission is false</td>
<td>CLA Check Permission for Scanning</td>
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<tr>
<td>Initiate CLA/DCS flow from Leganto</td>
<td></td>
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<tr>
<td>Partial Patron Digitization</td>
<td>Partial Patron Digitization - Link to scanned document</td>
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<tr>
<td>Partial Digitization - non-ALL non faculty digitation</td>
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**Configuration > Fulfillment > Copyright Management > Digitization and Copyright Rules**
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• Process and Track Copyright Approvals
• Process Digitization Requests
Process Copyright Approvals

When a digitization request or copyright request results in a copyright approval workflow, the request is pushed to the task list.

View under either “Other Requests-Digitization requests” or “Citations-Copyright waiting for approval” tasks.
Citations—Copyright Waiting for Approval Task

• All citations with copyright status “Waiting for Approval”
• View citation details, then click on link to navigate to approval task list.
• If no link, this has been manually changed to “waiting for approval”
Other Requests—Digitization Request Approval Task

- All approval requests, including, those not associated with a course
- View minimal course details
- Approve copyright or view details of rule
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  • Understand Which Resources Need Digitization
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  • Leverage Digitization and Copyright Rules
  • Process and Track Copyright Approvals
  • **Process Digitization Requests**
Process Digitization Requests

In parallel to - or after - the copyright approval workflow, the item is digitized:

1. Item is picked from shelf
2. Alma routes item to digitization department/desk
3. Item is digitized
4. Digitized file is added to citation (manually or automatically)
5. Request is marked as complete automatically
6. Alma routes physical item back to original location
In parallel to or after the copyright approval workflow, the item is digitized.

1. Starting on the reading list, review citation details
2. Pull item (manually) and scan pages
3. From citation, click on “Deliver Digital Documents” and upload file
4. Scanned file is added to citation (manually or automatically)
5. Request is marked as complete automatically
Ensure student access

• Copyright must be approved
  - Approved, Self declared, Fair use copyright status

• Citation status impacts visibility
  - (Configuration > Leganto > List Management > Copyright Settings)
  - display_not_complete_files (true/false, default false)
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• Additional Copyright Options
  • Add copyright statements to scans
  • Manage Copyright Auditing Process

• Alternate Copyright Workflows
• Additional Resources
Add Copyright Statements To Scans (and other course materials)

• Configure when the statement appears:
  Configuration > Leganto > List Management > Copyright Setting: copyright_declaration_notice

• Electronic, digital, file, link, all, blank (none); only if copyright record

• Configure the text:
  Configuration > Fulfillment > Copyright Management > Copyright Declaration: Leganto Digitization Request Copyright Declaration

Copyrights statement

This fully adheres to international copyright laws. If a user makes a request for or later uses a photocopy or reproduction for purposes in excess of copyright law, that user may be liable for copyright infringement.
I have read the above statement and agree to abide by its restrictions.
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- Questions to Consider First
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**Additional Copyright Options**
- Add copyright statements to scans
  - Manage Copyright Auditing Process

- Alternate Copyright Workflows
- Additional Resources
Manage Copyright Auditing Process

- The copyright attributes tab is filled in anytime that you manage a citation's copyright status using Alma's copyright approval system.
- Dates are automatically assigned but can be changed.
- Stored in the system, reportable in Analytics.

Catalog > Alma > Course Reserves > Copyright > CLA Reporting Template – UK
Catalog > Alma > Course Reserves > Copyright – Reporting Template – Australia
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• **Alternate Copyright Workflows**
  • Manage Copyright Manually
  • Don’t Want to Manage Copyright at All?!

• Additional Resources
Manage Copyright Manually

• Simply check the citation and click on change copyright status.
• No effect on visibility in Leganto
• No copyright attributes tab
• Useful for informational purposes only (no subsequent workflow implications)
Don’t Want to Manage Copyright at All?

• Course reserves automatic statuses table:
  
  citation_uploaded_file parameter
  
  - Set this to Complete

• Configure the File Upload Copyright Options mapping table:
  
  Configuration > Leganto > List Management > File Upload Copyright Options
  
  - Set at least one option that maps to either Approved, Fair Use or Self Declared.

• Ignore the task for citations with uploaded files
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• Copyright Management
• Configuring Leganto Copyright-Related Procedures
• Digitization Processing
• Manage Manually
• Configuring the Course Reserves Automatic Statuses Table
• Digital Fulfillment

Knowledge Center > Leganto > Training > Webinars > Become an Expert: Leganto
Integrating with External Copyright Agencies

CLA/DCS: Documentation / Video

CCC: Documentation / Video

Bolk: Documentation
• Managing copyright for citations

• Leganto-Alma Copyright Management
Question Time
Next Week
(Wed., June 12)

Optimizing the New Leganto User Interface