

Tipasa®

Copyright management

Learning objectives

This course provides the basic skills needed for staff in libraries in the United States to configure copyright management options and track copyright compliance for ILL requests requiring royalty payments. After completing this course, you will be able to interpret the copyright queue, select the appropriate option in the copyright clearance section of a request, and use Tipasa copyright reports.

Overview

- Copyright management features in Tipasa assist you in complying with United States copyright laws and guidelines.
 - 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 include:
 - 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)
 - CCG with fee payment required (obtain cost from Copyright Clearance Center)
 - Other
 - View and export lists of titles with copyright clearance marked
 - View and export lists of payable copyright fees

Setup

In OCLC Service Configuration > **WorldShare ILL**:

- Go to **Advanced Workflows**, and scroll down to the **Copyright** section
 - For **Select whether you want to manage copyright for requested copies**, select the **On** box. This setting enables additional functionality, including the Copyright Clearance accordion in borrowing requests when Copy is selected as the Type.

Copyright management

- For **View copyright clearing in a separate queue**, select the **On** box. This is useful if specific staff members are responsible for reviewing requests for copyright compliance.
- For **Number of years required for copyright**, select either 5 calendar years or 6 calendar years
- **Optional:** For **Clear patron-initiated requests for copyright automatically if they match titles used less than 5 times**, select the **On** box. For more information on this option, see [Tipasa Help](#).
 - Copy requests can be automatic:
 - If a 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)
- **Optional:** Go to **Article Exchange Retention Settings**.
 - Under Article Exchange Retention settings:
 - Configure the number of views allowed per copy document (default is 5 views).
 - Configure the number of days after it is first viewed that your patron can access a copy document (default is 30 days).
 - Configure number of days after which copy document will be purged if your patron has not accessed it (default is 30 days).
 - If you make changes to these settings, edit [Notifications](#) as needed.
 - Under Copyright Compliance Declaration:
 - Select **Enable copyright compliance display prior to accessing a copy document**, and enter a declaration. When this feature is enabled, patrons will first be directed to an Article Exchange page where they will acknowledge that they have read the text you enter here. Once the patron has selected Proceed, the document download will be processed.
- Click **Save**.


Process copy requests

- If copyright queue is enabled, requests needing copyright clearance appear in Copyright queue AND New for Review queue
 - CCL requests will not be in Copyright queue
 - Requests for which you have already cleared copyright will not be in Copyright queue
 - Copyright queue appears only when there are requests needing copyright clearance

Copyright management

- Open the Copyright queue from left navigation or quick links
- Used column of copyright queue:
 - X (y of x pending)
 - X = number of CCG requests for this title during this calendar year, not counting the current request
 - Y = number of requests submitted but not yet filled
 - ? – Request does not match title in your copyright table (no match or multiple potential matches)
- 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."
- In the Copyright clearance accordion of a request, you can check for similar previously borrowed titles.
- If Tipasa did not find a match based on information in the request, you can search WorldCat and when you find the appropriate record, apply data to the request
- On each request, select the appropriate copyright clearance:
 - Clear for fair use (CCG)
 - Clear with fee payment required (CCG)
 - Other
 - Cancel request and do not clear
- If you determine that a fee payment will be required:
 - In the Copyright accordion of a request, click **Clear with fee payment required (CCG)**
 - Tipasa will query Copyright Clearance Center (CCC) for the fee
 - If there is more than one potential matching title, select the appropriate title
 - If necessary, edit the page count and click **Update**
 - Tipasa will populate the request with the fee obtained from CCC
 - Tipasa will track this fee, which you can view by clicking **Manage Copyright > Copyright Titles** in the left navigation
- If issue date is more than 5 years ago, copyright clearance accordion in request displays message "Titles published more than 5 years ago do not require copyright clearance", and it is not included in the use count
- As you cancel requests or change copyright compliance, counts automatically update (in copyright queue and individual requests)

Manage Copyright

- To view your library's Copyright Titles table, click **Manage Copyright > Copyright Titles**. This table includes both filled and unfilled requests marked CCG, "CCG with fee payment required", or "other"; even if these requests have been added to a payment batch. It does not include requests for materials published more than 5 years ago (or 6 years ago, depending on your library's setting for "Number of years required for copyright" setting in Service Configuration), since these do not require copyright tracking.
 - By default, all usages with a request date in the current calendar year display
 - Optional: From the Request Date menu, select a different year
 - Optional: From the Show menu, select
 - Titles with >5 usages
 - Titles with >5 fair usages
 - Titles with 'Will Pay' usages
 - Optional: **Export** this table
 - Optional: **View** details for an individual title
 - Optional: Click **Edit** to change the Permission Type (Fair Use, Will Pay, or Other) for an individual request. You can only edit the Permission Type on requests that have not yet been added to a payment batch.
- **Copyright Fees Payable**: includes only filled requests marked "CCG with fee payment required" which have not yet been added to a payment batch.
- Payment batches allow you to create a list (spreadsheet) of committed payments ready for submission to a copyright payment agency. Adding these payments to a batch removes them from future inclusion in the Copyright Fees Payable view.
- To create a payment batch, on the Copyright Fees Payable screen, click **Create Payment Batch**.
 - **Caution**: Clicking the **Create Payment Batch** button immediately adds everything on the Copyright Fees Payable screen to a new payment batch. This action cannot be undone. Once a batch has been created, you can not edit the payment information (e.g., number of pages or fee).
 - To create a CSV (comma-separated values) file from a payment batch: On the **Manage Copyright > Payment Batches** screen, click the export button 

Exercises

- [Copyright management simulation](#)
- [Copyright management quiz](#)