Tipasa®

Copyright management

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OCLC

OCLC

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

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

- With copyright management turned on

▾ Copyright Clearance

✓ Previously requested title matched.
Matched with
- English journal
- ISSN: 00138274
- OCLC Number: 1325886
- Total uses: 6

Total uses   6 (1 of 6 pending fulfillment)
Check for similar previously borrowed titles ?

Copyright Clearance
○ Clear for Fair Use (CCG)
○ Clear with fee payment required (CCG)
○ Other [   ] ?
○ Cancel request and do not clear [Cancel Request]

OCLC

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)

Patron view of copyright compliance statement

OCLC® Article Exchange

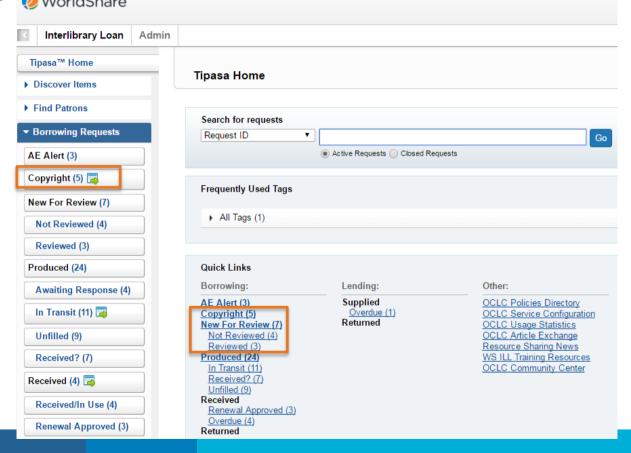**Copyright Compliance statement:**

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

Copyright queue

Borrowing Requests: Copyright (4)

Batch actions to "Cop...

Copyright Payments Total **$0.00** ?

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

Results 1 - 4 of 4

Rows 20 ▼

Export All

Used	ID	Media Type	Title	Patron	Date Requested	Need Before
3 (1 of 3 pending)	169177164		Performance improvement quarterly.	Smith, Sara	08/02/2...	09/16/201...
?	169157986					09/01/2...
?	168837922					09/16/2...
?	168753228		Performance + Instruction	Green, Joseph	07/22/20...	09/01/2...

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

Results 1 - 4 of 4

Rows 20 ▼
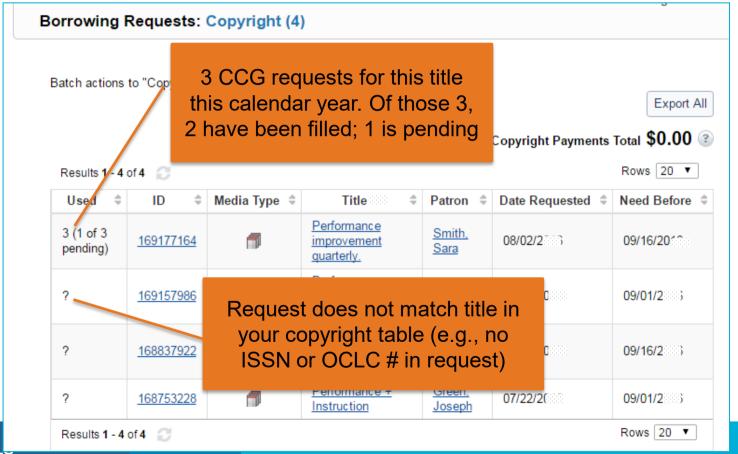
Copyright matching

- 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

Request Details (Request ID 177927831)

Source	PATRON
Status	Not Reviewed
Title / Journal	Performance improvement quarterly
	🔍
Uniform Title	
Author	
Publisher	[unknown] : [unknown], 2014
ISBN	
ISSN	
OCLC	

No ISSN nor OCLC #

Copyright Clearance

ℹ This request has neither ISSN nor OCLC # for copyright matching.

Total uses

Check for similar previously borrowed titles ?

Check for similar previously borrowed titles

Select a Matching Journal ✖

Performance Improvement Quarterly   0   Create New Title

No results ⟳

Title	ISSN	OCLC Number	Times Used	Action

No results ⟳

Close

Search WorldCat to find OCLC # or ISSN

Request Details (Request ID 169157986)

Source	PATRON
Status	Not Reviewed
Title / Journal	Performance Improvement Quarterly

Expert search:
Title phrase = Performance improvement quarterly

Interlibrary Loan   Analytics   Admin

Tipasa® Home

▼ Discover Items

Search: Expert Search = ti=performan

▸ Advanced Search

Search
Scope
All WorldCat ▼
Index
Title ▼

Results 1 - 10 of 25

Sort by Library Count (Highest First) ▼

Term(s)

ti=performance improvement quarterly   ✕

Search   Clear

Select title

Search: Expert Search = ti=Performance Improvement Quarterly (All WorldCat)

▶ Advanced Search

Results **1 - 10** of **24** ⟳

Sort by [Library Count (Highest first) ▼]

ℹ **Performance improvement quarterly.**
by Florida State University; National Society for Performance and Instruction; International Society for Performance Improvement
📕 ePeriodical (digital), English
Publisher: Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction
ISSN#: 1937-8327 | OCLC#: 60619000
Search for versions with same title and author

⊖ **Not Held** by my library
State Holdings
Regional Holdings
All Holdings (792)

ℹ **Performance improvement quarterly.**
by Florida State University; National Society for Performance and Instruction; International Society for Performance Improvement
📕 Periodical, English
Publisher: Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction, c1988-
ISSN#: 0898-5952 | OCLC#: 17858576
Search for versions with same title and author

⊖ **Not Held** by my library
State Holdings
Regional Holdings
All Holdings (154)

Apply data to request

Performance improvement quarterly. (17858576)

Performance improvement quarterly.
by Florida State University; National Society for Performance and Instruction; International Society for Performance Improvement

Periodical, , English

Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction, c1988-

🚫 **Not Held** by my library
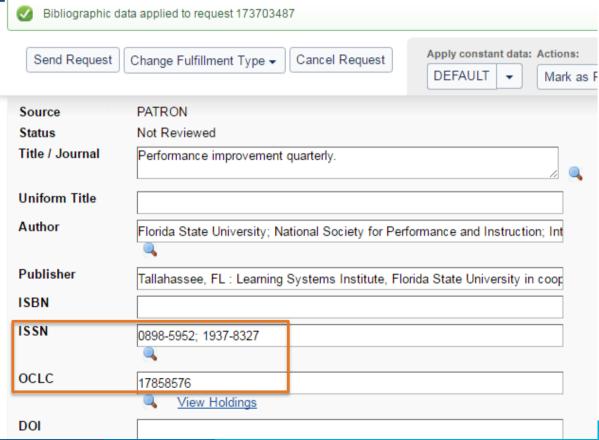
All Holdings (156)

Description	Holdings	Find Related	Subject

OCLC Number:	17858576
Description:	Vol. 1, no. 1-; v. : ill. ; 23 cm.
ISSN:	0898-5952; 1937-8327

Apply data to request
173703487

Request now has ISSN & OCLC

Bibliographic data applied to request 173703487

Send Request | Change Fulfillment Type ▾ | Cancel Request

Apply constant data: Actions:

DEFAULT ▾ | Mark as F

Source	PATRON
Status	Not Reviewed
Title / Journal	Performance improvement quarterly.
Uniform Title	
Author	Florida State University; National Society for Performance and Instruction; Int
Publisher	Tallahassee, FL : Learning Systems Institute, Florida State University in coop
ISBN	
ISSN	0898-5952; 1937-8327
OCLC	17858576
	View Holdings
DOI	

Request now matches previously requested title

Make copyright clearance selection

Copyright Clearance

✓ Previously requested title matched.

Matched with

- Performance improvement quarterly
- ISSN: 08985952
- OCLC Number: 17858576
- Total uses: 1

Matched on OCLC # and ISSN

Total uses   1 (1 of 1 pending fulfillment)

Check for similar previously borrowed titles ?

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

Copyright Clearance   ⦿ Clear for Fair Use (CCG)

Therefore, staff marks as Clear for Fair Use (CCG)

○ Clear with fee payment required (CCG)

○ Other

○ Cancel request and do not clear Cancel Request

Another title-matching example

Request Details (Request ID 171715172)

Source	PATRON
Status	Not Reviewed
Title / Journal	Art history
Uniform Title	
Author	
Publisher	[unknown] : [unknown], 2013
ISBN	
ISSN	0141-6790
OCLC	
DOI	10.1111/1467-8365.12028

ISSN in request

Title not used

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

Copyright Clearance

ⓘ No previously borrowed journal matches found.

Total uses   ?

Check for similar previously borrowed titles ?

Create new title

Select a Matching Journal   ✕

Art history   0141-6790   0   Create New Title

No results ↻

Title	ISSN	OCLC Number	Times Used	Action
No results ↻				

Close

Another title-matching example

Select a Matching Journal   ✖

Journal of transportation engineering,   0   [Create New Title]

Results **1 - 1 of 1** ↻

Title	ISSN	OCLC Number	Times Used	Action
Journal of transportation engineering	0733947X 19435436	8674831	2	[Select as match]

Results **1 - 1 of 1**

Potential match

Click to confirm match

[Close]

OCLC

Use count 5+

Borrowing Requests: Copyright (2)

IFC Reg ID: 00990

Batch actions to "Copyright" items   Mark As Fair Use   Cancel Requests

Export All

Pledged Copyright Payments Total **$137.25** ⑦

Results **1** - **2** of **2** ↻

Rows 20 ▼

Used	ID	Media Type	Title	Patron	Dat
3 (1 of 3 pending)	168468329	🗐	Performance improvement quarterly.	Jones, Nancy	10/
7 (1 of 7 pending)	168467607	🗐	English journal.	James, Jordan	10/

Results **1** - **2** of **2** ↻

When a title's use count is 5+, number has orange background

▾ Copyright Clearance

✓ Previously requested title matched.
Matched with
- Performance improvement quarterly
- ISSN: 08985952
- OCLC Number: 17858576
- Total uses: 6

Total uses   **6** (1 of 6 pending fulfillment)
Check for similar previously borrowed titles ⑦

Copyright Clearance   ○ Clear for Fair Use (CCG)
                                              ○ Clear with fee payment required (CCG)
                                              ○ Other [   ] ⑦
                                              ○ Cancel request and do not clear Cancel Request

Other copyright clearance options

Copyright Clearance

○ 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]

CCL

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"

Copyright Titles: view details

Tipasa® Home

▶ Discover Items

▶ Find Patrons

▶ Borrowing Requests

▶ Document Delivery

▶ Lending Requests

▶ Purchasing Requests

▶ Off-System Requests

▶ Print Queue (17)

▼ Manage Copyright

   Copyright Titles

✖ Performance improvement quarterly: 2017

   Copyright Fees Payable

   Payment Batches

TPU Reg ID: 38998

Manage Copyright: Title Usages

Title	Performance improvement quarterly
ISSN	0898-5952; 1937-8327
OCLC Number	17858576

Copyright Fees Total **$83.00** ?

Results **1 - 7 of 7**

Rows 10 ▼

Request ID	Committed Date	Issue Date	Permission Type	Number of Pages	Fee	Batch Name	Action
169156232			Fair Use				Edit
173703617		2015	Fair Use	1			Edit
177879629		2014	Fair Use				Edit
177879709		2015	Fair Use				Edit
177879801		2013	Fair Use				Edit
177879925	05/15/2017	2015	Will Pay	20	$41.50	Payments-2017-05-17	Edit
177927831		2014	Will Pay	23	$41.50		Edit

Results **1 - 7 of 7**

Rows 10 ▼

OCLC

Copyright Titles: Edit copyright usage

Edit Copyright Usage

Request ID	177927831
Pages	59-81
Issue Date	2014
Permission Type *	Will Pay ▾
	Fair Use
	Will Pay
Number of Pages *	Other	Update
Fee *	41.50 USD

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

Create Payment Batch

Committed Copyright Payments Total **$15.40** ?

Results **1 - 4 of 4**

Rows 10 ▼

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

Results **1 - 4 of 4**

Rows 10 ▼

Export payment batch

OCLC WorldShare

Interlibrary Loan | Admin

Tipasa™ Home

Discover Items

Find Patrons

Borrowing Requests

Lending Requests

Purchasing Requests

Print Queue (4)

Manage Copyright

Copyright Titles

Copyright Fees Payable

Payment Batches

TPU Reg ID: 38998

Manage Copyright: Payment Batches

Results **1 - 2** of **2**   Rows 10 ▼

Batch Name	Created Date	Number Paid	Total Payment	Action
Payments-2017-02-24	02/24/2017	4	$15.40	
Payments-2017-02-20	02/20/2017	4	$137.25	

Results **1 - 2** of **2**   Rows 10 ▼

Export as CSV

Payment batch formatted in Excel

REQUESTID	TITLE	ISSN	OCLCNUMBER	ISSUEDATE	PAGECOUNT	FEES	CURRENCY
173779477	English journal	0013-8274, 2161-8895	1325886, 3536493	2015	7	$ 3.85	USD
173780377	English journal	0013-8274, 2161-8895	1325886, 3536493	5/1/2015	1	$ 3.90	USD
173781091	English journal	0013-8274, 2161-8895	1325886, 3536493	Sep-14	1	$ 3.80	USD
173831569	English journal	0013-8274, 2161-8895	1325886, 3536493	Nov-13	7	$ 3.85	USD

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
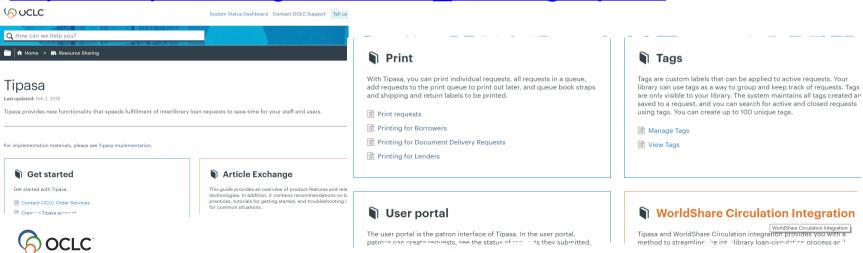- See [release notes](#) for more information
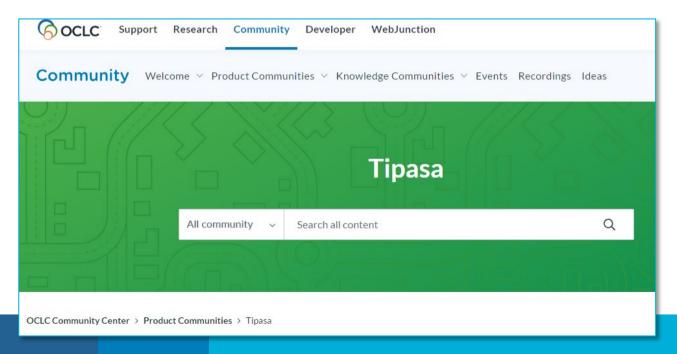
Documentation and training

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 or 1.800.848.5878