# ILLiad Copyright: Issues and Processing

**ILLiad Training Session**
***Atlas Training and Library Solutions***

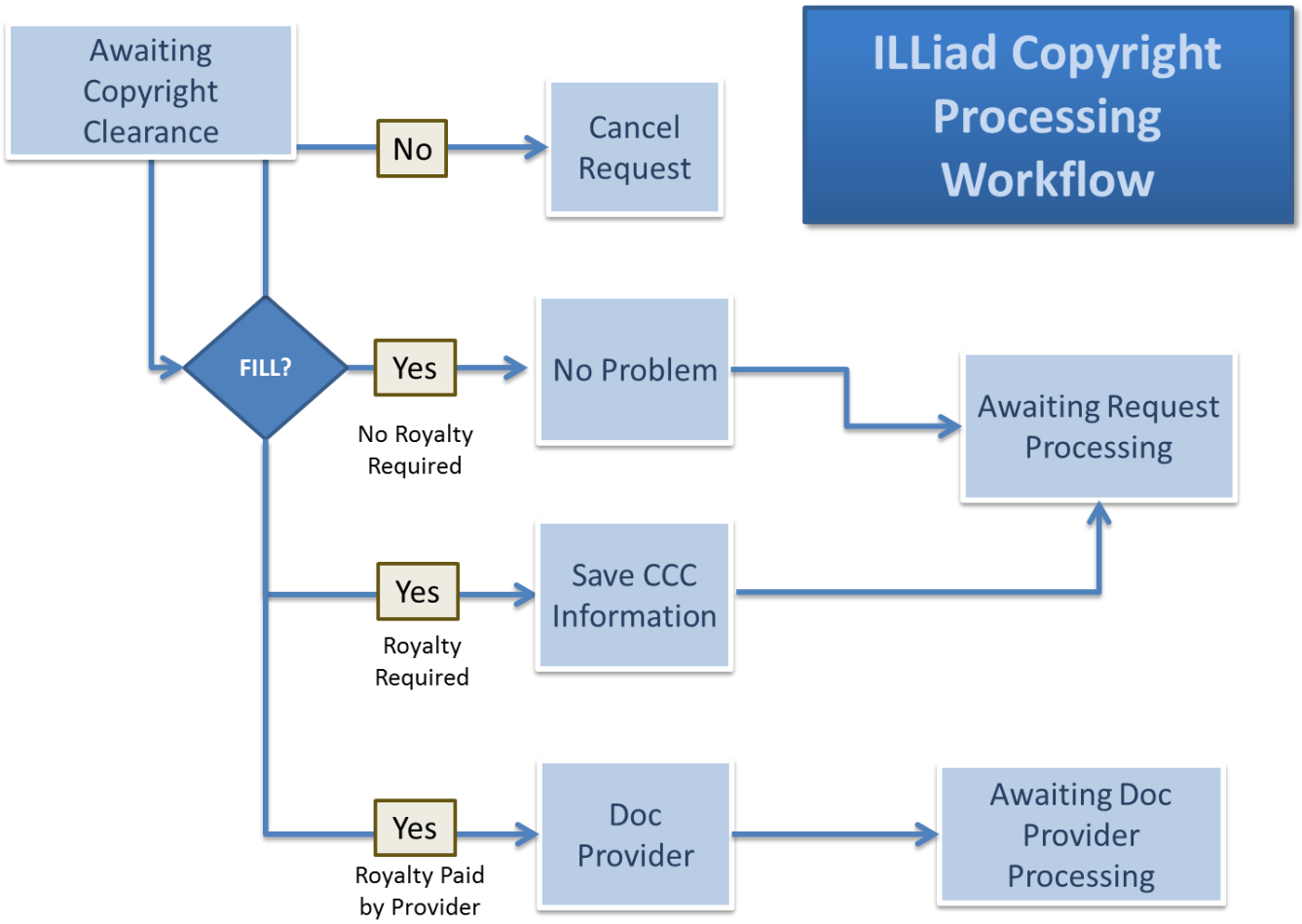
## Session Outline

- Brief History
- Essential Concepts
- Exemptions
- Copyright in Context
- Applying It to ILLiad

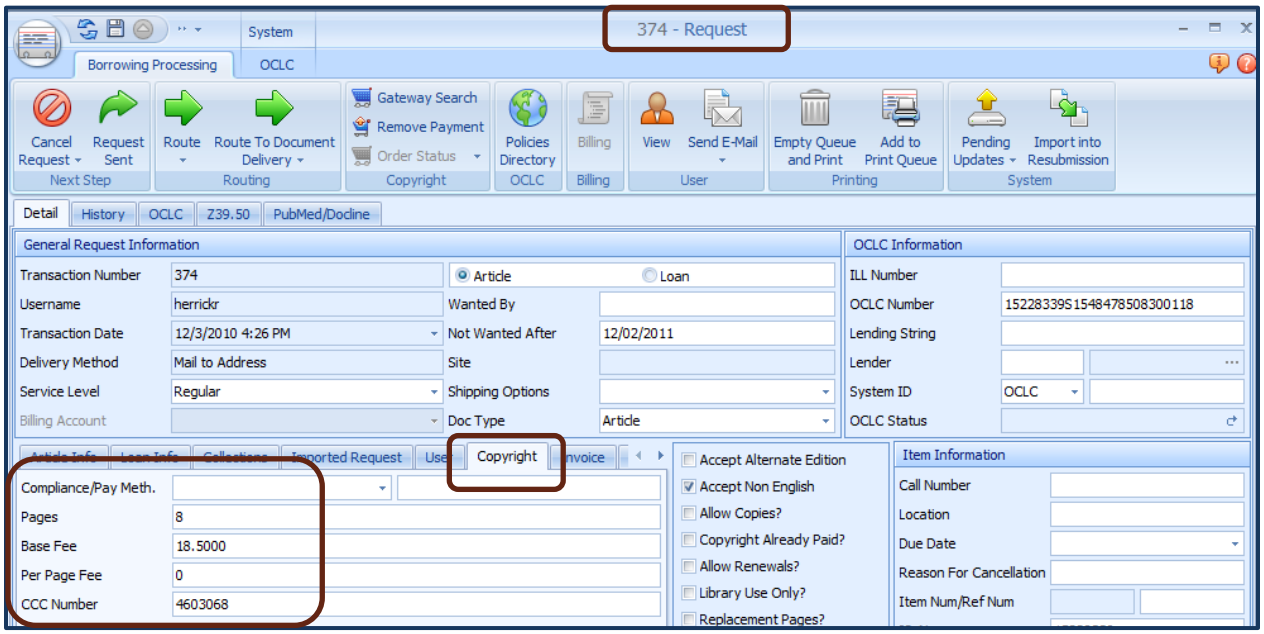
### ILLiad Copyright Processing

- Everyday activity
- All article requests start at Awaiting Copyright Clearance
  - **Why? What if we change our workflow?**
- Items processed according to **your institution's policies/procedures** regarding copyright
- **Copyright Workflow**
- Requests evaluated to fill
  - No = Cancel
  - Yes = Copyright Decision
    - No Problem or Save CCC or Doc Provider
- Request moves to Awaiting Request Processing
- Saved copyright information when order copyright order is created and submitted

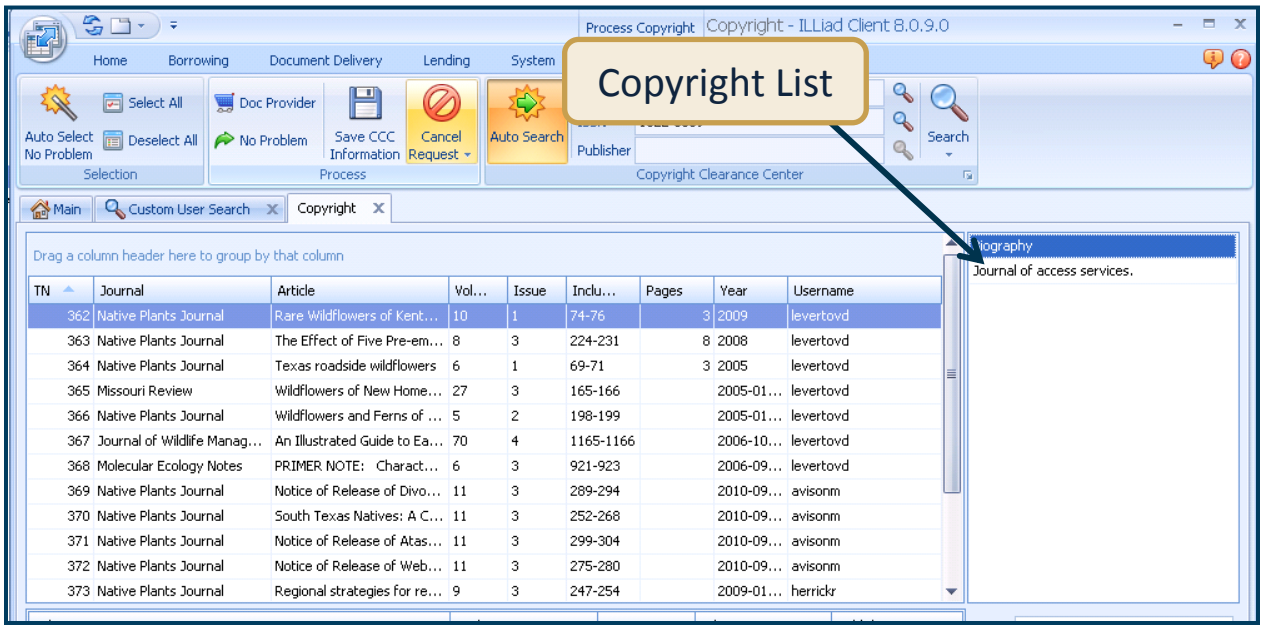
## Copyright Workflow




To view details of a particular transaction, click the **Copyright** tab



- **The Copyright List**
- Upper right hand pane
- Contains list of journal titles you have borrowed 5 or more recent (less than 5 years old) articles during the current calendar year
- More requests from these titles would typically require copyright royalty payment
- Query based on active requests and completed requests

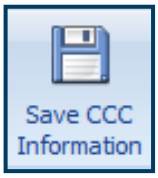



## Copyright List Query

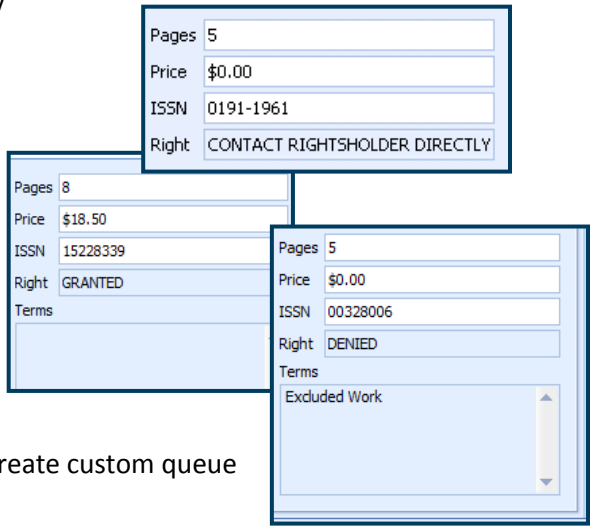
```
select distinct PhotoJournalTitle from Transactions
where (transactionstatus != 'Cancelled by ILL Staff'
and transactionstatus != 'Cancelled by Customer'
and transactionstatus != 'Awaiting Copyright Clearance'
and CopyrightAlreadyPaid != 'Yes')
and datepart(year, TransactionDate) = datepart(year, getdate())
and PhotoJournalYear > convert(varchar(4),(datepart(year, getdate()) - 5))
and ProcessType = 'Borrowing'
group by PhotoJournalTitle
having count(PhotoJournalTitle) > 4
```

- **Auto Select No Problem**
- Automatically selects items more than 5 years old to process all at once
- Because of inconsistencies in the way customers may enter dates, review the auto-selections to verify appropriate copyright royalty payments
- Customize Auto-Select Value
  - Customization Manager Borrowing |Copyright |CopyrightYears
  - Any integer value

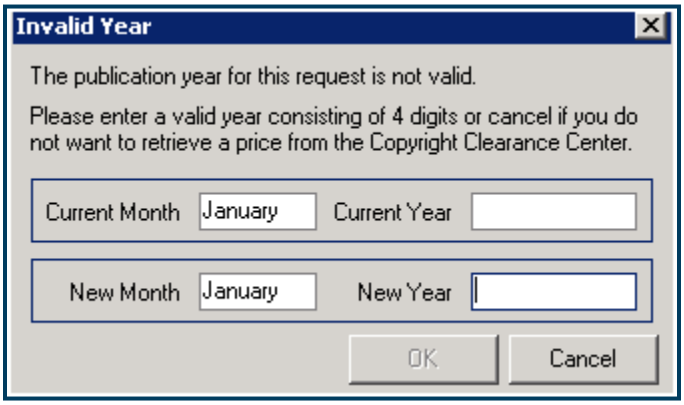
- **Save CCC Information button**
  - Does not make payments or send payment information
  - Attaches the rights information to the selected transaction record
  - **IF delivered successfully**, it will appear in the copyright report as requiring payment



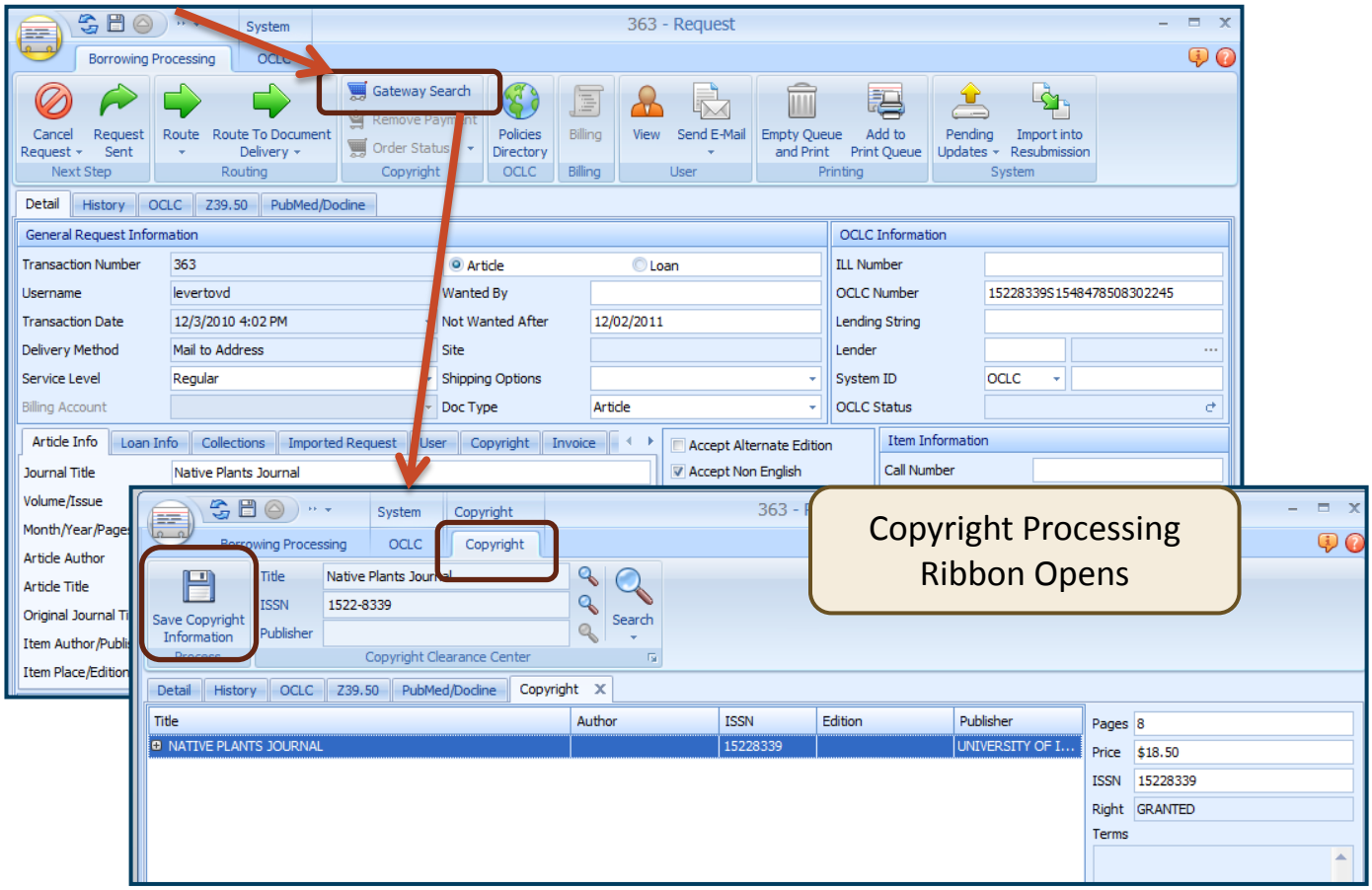

- **Copyright Clearance Center**
  - Supplies **permission** and processes royalty payments
  - Does **not** supply the copyrighted content
  - Initial search for rights clearance and royalty information is **anonymous**.
  - Use of gateway for **searching** does not require an account at CCC
  - Use of payment gateway requires CCC account for your institution
  - ILLiad collect rights information from initial processing
  - Initiating payment requires submitting "order" in separate step
  - ILLiad always allows staff to have "last word" on royalty payments
- **Rights Statuses**
  - Granted
    - Use No Problem or Save CCC Information Options
  - Denied and Contact Rights Holder
    - Save CCC Information option not available
    - Save CCC Information option not available
    - Use Alternate workflow—IF need to pay royalty
    - Add notes to Copyright tab in Request Record
    - Route them to the next appropriate status or create custom queue for them



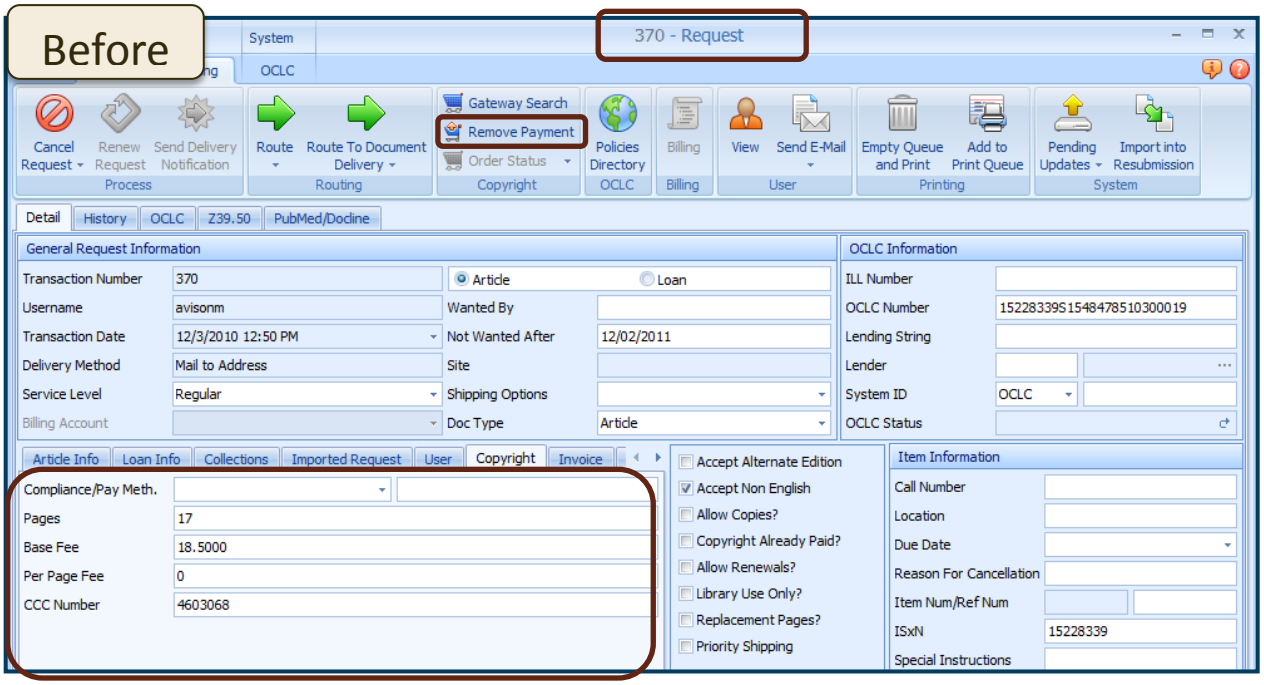

- **Sort**
  - Sort transactions to be cleared by journal title for easier comparison to the copyright list
  - Sort additionally by patron
    - Identify duplicate requests
    - Identify requests from same journal issue by same patron  Rule of 2 information available in CCC ILL Brochure: http://www.copyright.com/media/pdfs/ILL-Brochure.pdf
- **OpenURL Mapping**
- If you frequently experience problems with date fields importing in an irregular format from OpenURL
- requests – you might be able to fix using OpenURLMapping table

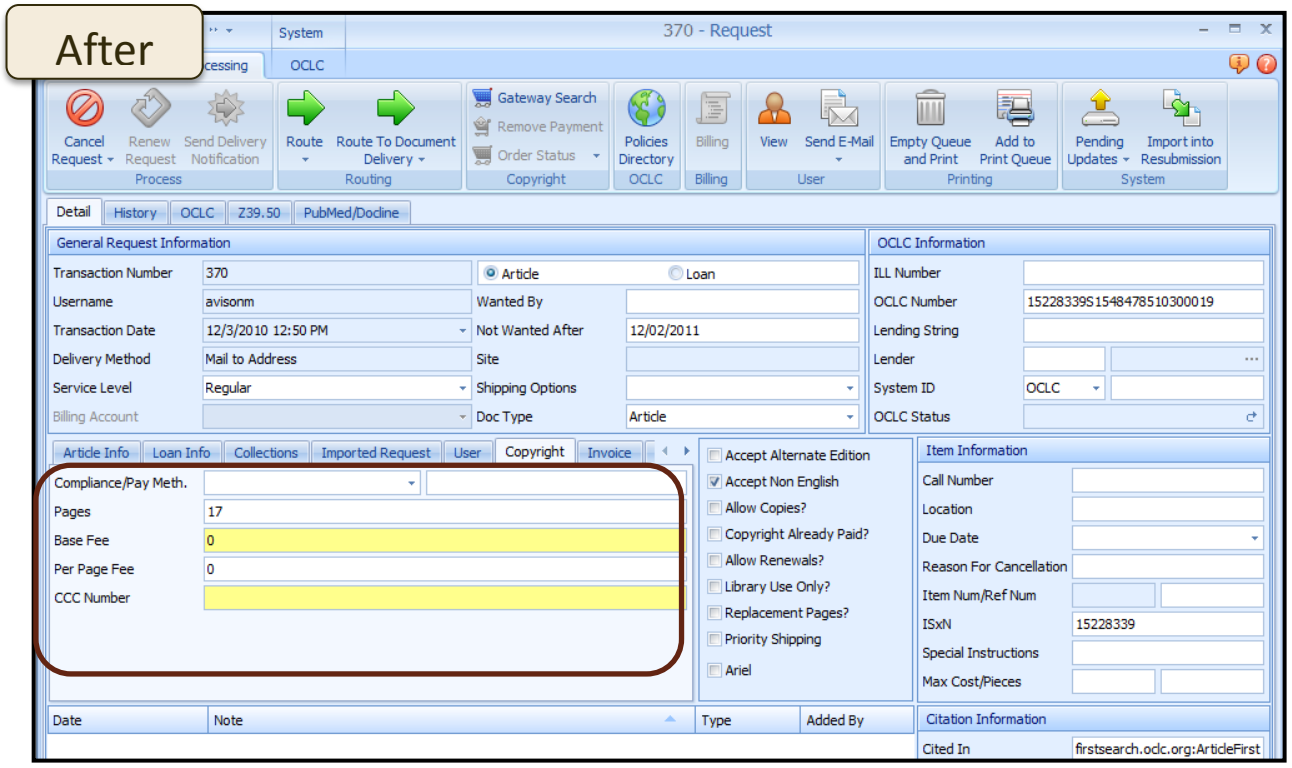


- **Title Issues and Requesting Systems**
- If using Docline/PubMed and OCLC
- Abbreviated journal titles in Docline will not match OCLC full title listing
- Example
- Journal of the American Podiatric Medical Association(OCLC)
- J Am Podiatr Med Assoc (Docline)
- Most Docline users standardize on either Docline or OCLC titles – whichever system they use most often
- **Document Providers**
- Suppliers that pay/handle copyright clearance as part of providing article
- Examples = British Library, Infotrieve
- Set copyright payer status on Address Record
- For list of document suppliers
    - http://www.oclc.org/support/documentation/resourcesharing/docsuppliers
- **Editing CCC Copyright Information on ILLiad Requests**
- Adding copyright payment information later
    - Open Request Form
    - Click the **Gateway Search** button in the Copyright box at top
    - Select the desired CCC record (if there are multiples) and click the **Save Copyright Payment Information** button
    - Save and close



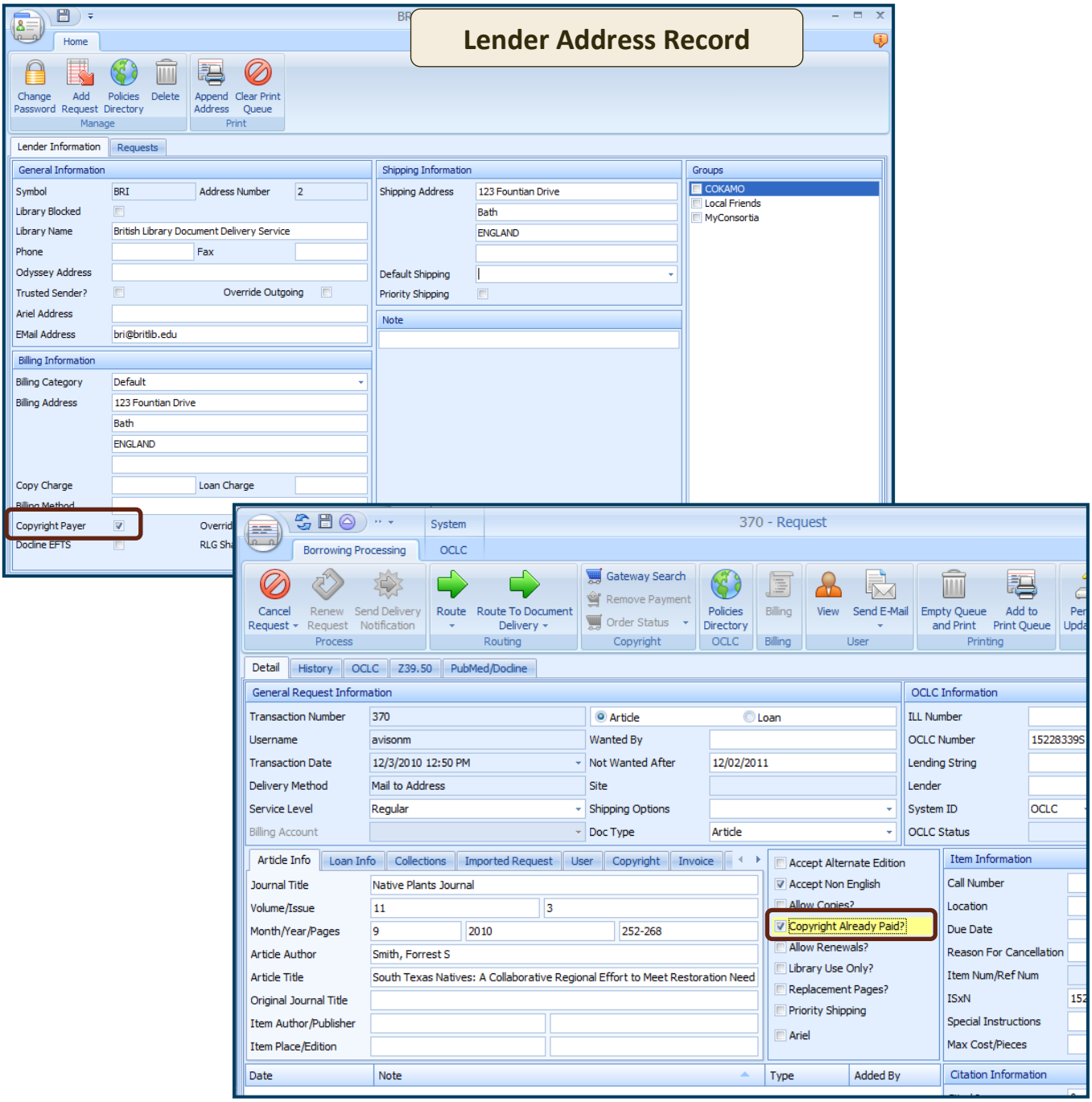
## Removing Copyright Payment Information



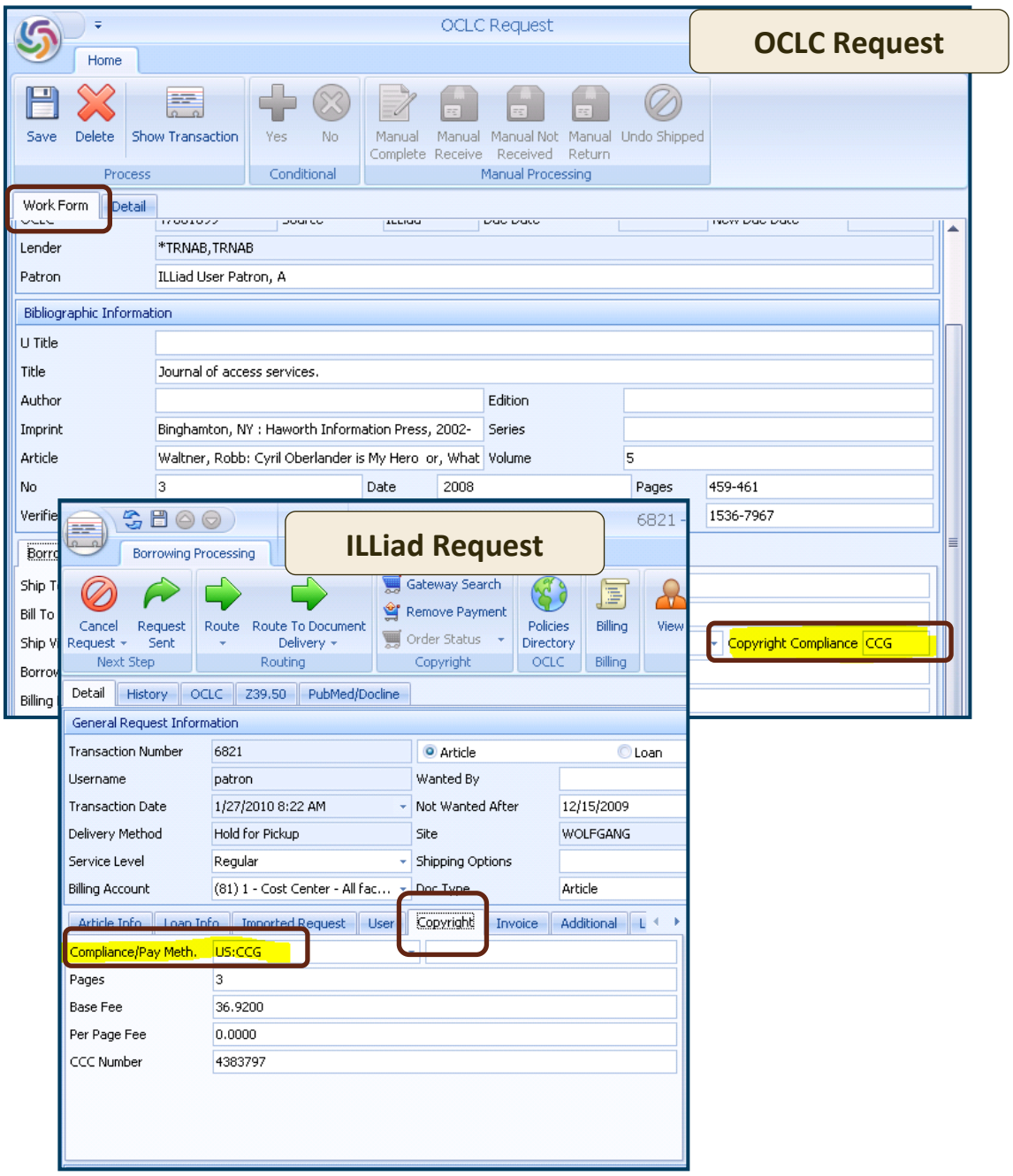
- **Copyright Already Paid**
- Indicated on Request Form
  - Lending library indicated as Copyright Payer on address form
  - Can also be manually added to a request
  - ILLiad checks Copyright Payer when item is received from the lending library
- Filtered from copyright reports or queries that count toward the CONTU guidelines

**Copyright Payer in Lender Address Form**



**Copyright Compliance Field (CopyrightComp)**

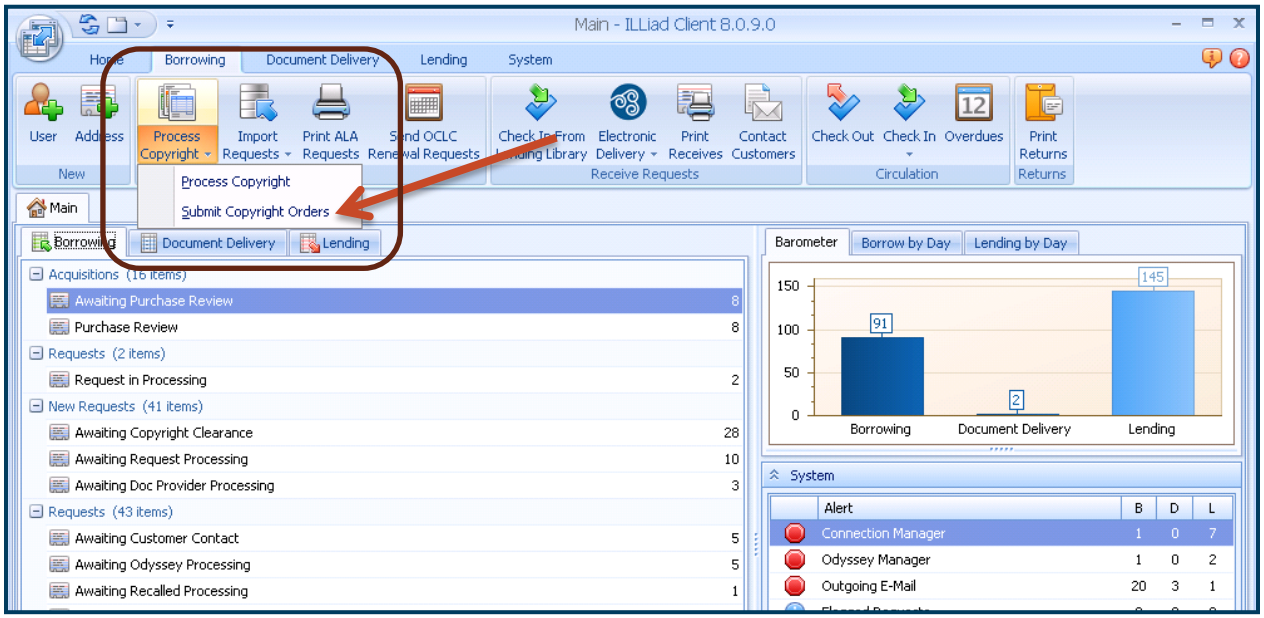
- "CCL" = "compliance with copyright law"
- "CCG" refers to "compliance with copyright guidelines"
- ILLiad automatically assigns this value according to the year indicated in the request
  - Uses US:CCL and US:CCG notations
  - Assigned when
    - RequestType = Article
    - PhotoJournalYear < 5 years prior
- All others assigned US:CCL
  - If the value in PhotoJournalYear cannot be converted to a number = CCL
- You may change and save as necessary on OCLC workform or on OCLC General Update form



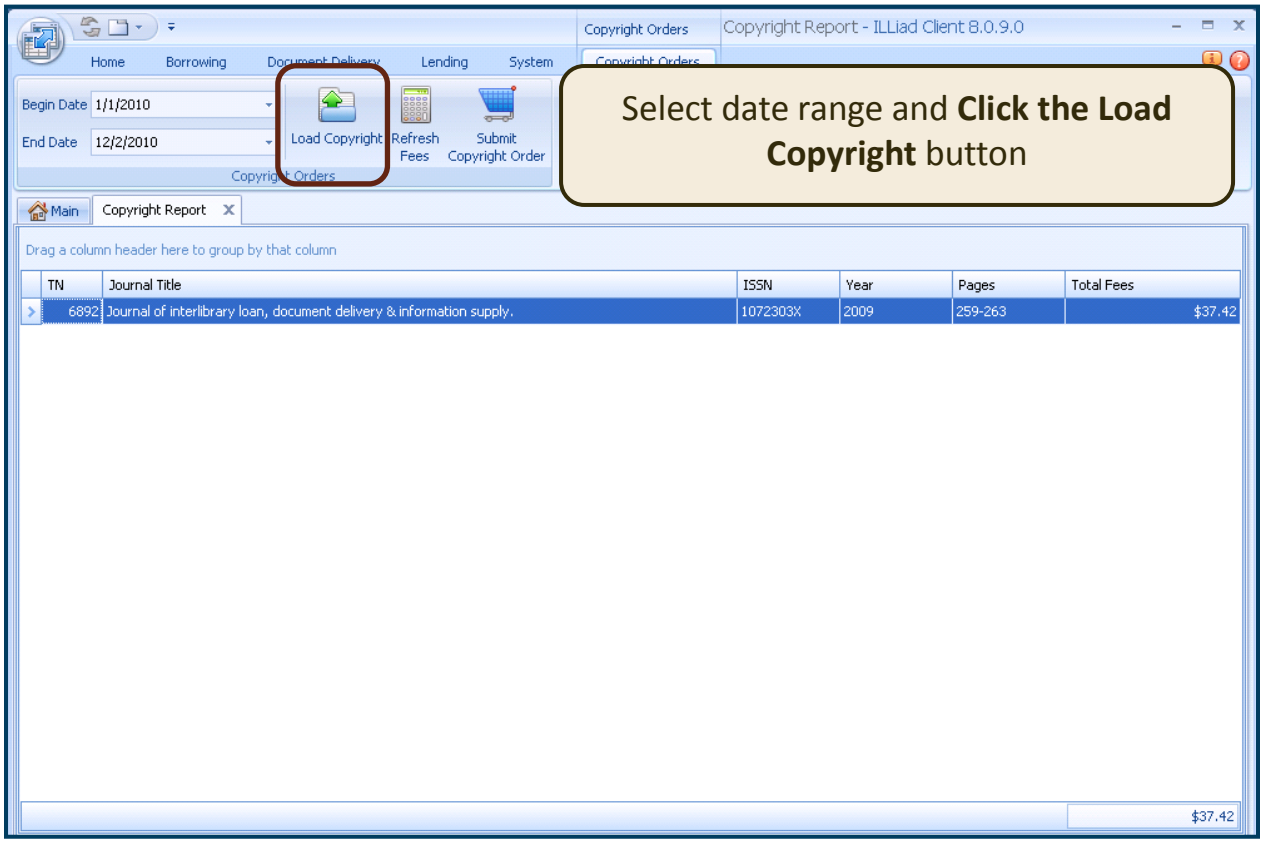
## Create Copyright Order

- Scheduling Copyright Payment Orders
  - Your choice
  - Once or twice yearly is common
- Access the Order Form
  - Client Borrowing Ribbon
  - Lower-Half of **Process Copyright Button**
  - Choose **Submit Copyright Orders** option

**Note**: Since the Copyright Clearance Center requires that the copyright royalty fee information for any article request be current at the time of the payment order submission, rather than at the time the request is processed, there may potentially be a cost savings in submitting payment orders to the CCC more frequently.

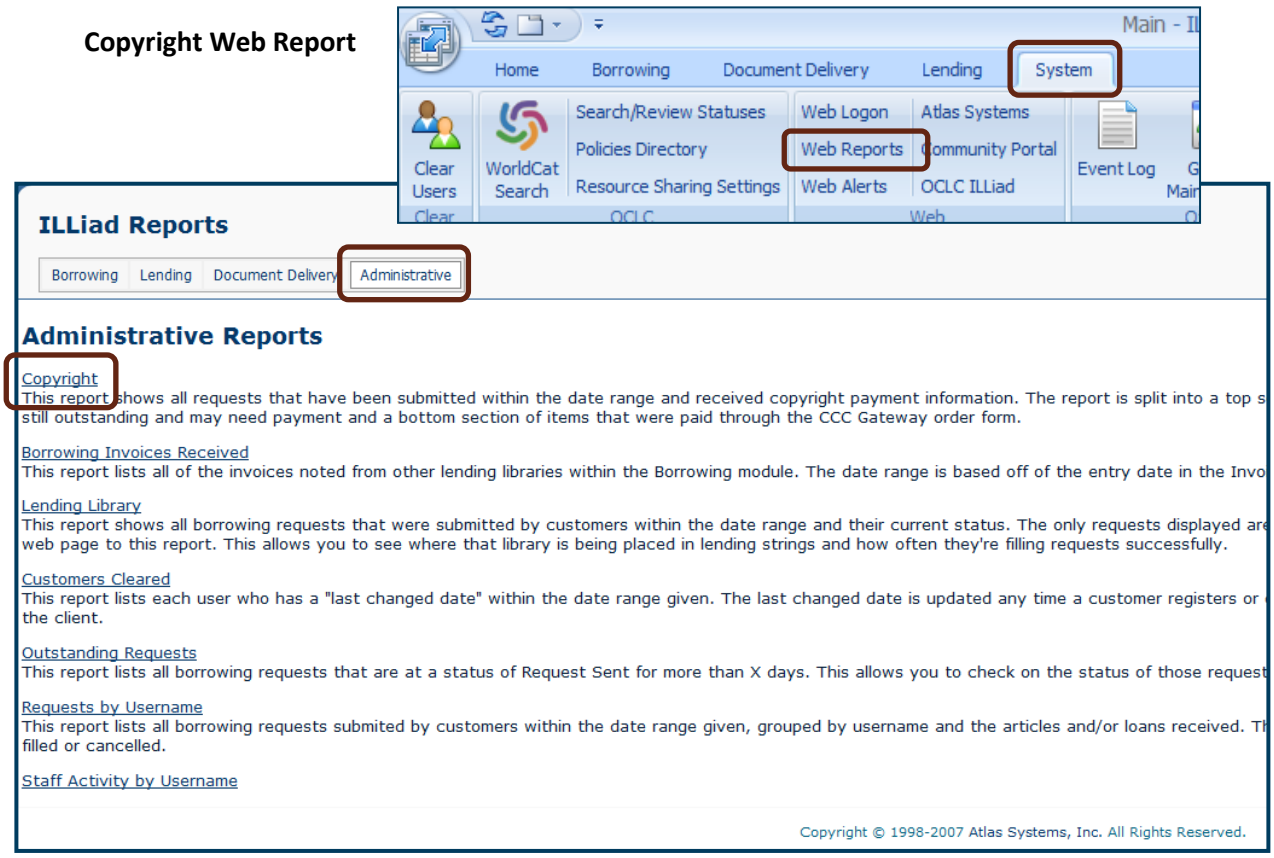



- Select Date range
  - Recommendation is to leave the begin date alone
    - Allows transactions from prior date ranges which might not have been completed at the time of copyright order submission to be caught and paid when they become finished
    - Only items that still need to be paid will be included in this list
- Load Copyright Report
- What is included in the CCC Copyright Order screen?
  - The Tracking table shows the transaction as having been routed to a status of Awaiting Copyright Clearance between the specified date values.
  - The journal title is not blank.
  - The transaction status is either Request Finished or Delivered to Web.
  - The CopyrightAlreadyPaid value for the transaction is No.
  - The BaseFee value for the transaction is not NULL.
  - The BaseFee multiplied by the number of pages of the article is not equal to zero.
  - Copyright payment information was attached to the transaction during the specified date range.
  - The CCCNumber value for the transaction is neither blank nor NULL.
  - The CCCOrder value for the transaction is Yes.




- Refresh Fees
  - Anonymous Lookup
  - The Copyright Clearance Center requires that all submitted fee information agree with the current CCC pricing at the time of the copyright order submission.
  - No order submitted yet
- Submit Order
  - Connect to Copyright Clearance Center and submit order for every transaction
  - Can take several minutes
    - Progress bar
  - CCC will send you an invoice
- View Order
  - To Viewing Details of order on a particular transaction
  - Go to the request form
  - Order Status in Copyright box
- Cancel Order
  - Prior to CCC Invoicing
  - Cancel copyright order on a particular transaction
  - Go to the request form
  - Order Status
  - Click Cancel Order button

**If CCC has already invoiced, you cannot cancel the order.**

- **Unusual Copyright Processing**
- Denied, title not in CCC database, Special Order, Contact Rights Holder Directly, etc.
  - Complete special order or contact rights holder directly to obtain correct fee information
  - Double click in Copyright Processing form to open General Update Form
  - Add BaseFee, PerPage fee, number of pages, CCL/CCG entry
  - Add note in CCCNumber field such as “Pay Publisher”
  - Save
  - Select No Problem to move through workflow
- Run Copyright Web Report to see all remaining transactions for which copyright payment is outstanding
- Identify by CCCNumber note
- Pay copyright
- Add note to transaction record
- Mark ‘Copyright Already Paid’

**Copyright Web Report**