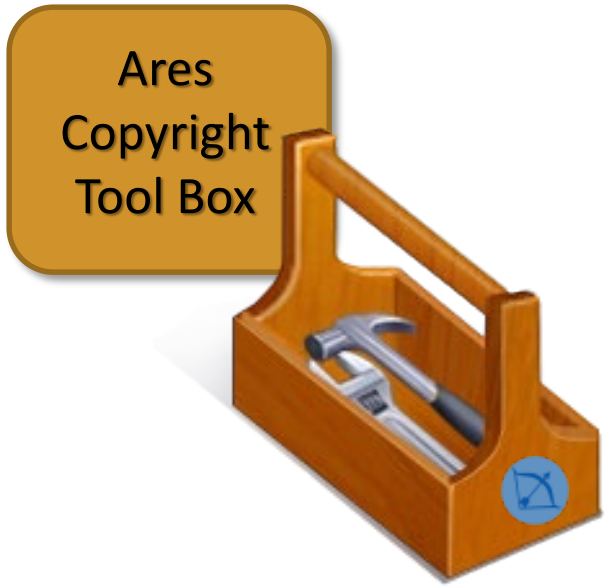
Ares Copyright Processing

Heather Black

Agenda

- Ares Copyright Overview
  - Basic Functionality
- Decision Making Tools
  - Reserves History
  - Copyright Clearance Center Search
  - Alternate Rightsholder
- Processing Tools
  - Basic
  - CCC Gateway
    - Pay Per Use
    - Annual License
  - Alternate Rightsholder
- Miscellany



Disclaimer

- For informational purposes
- Not to be considered legal advice

Ares Copyright Processing

COPYRIGHT OVERVIEW

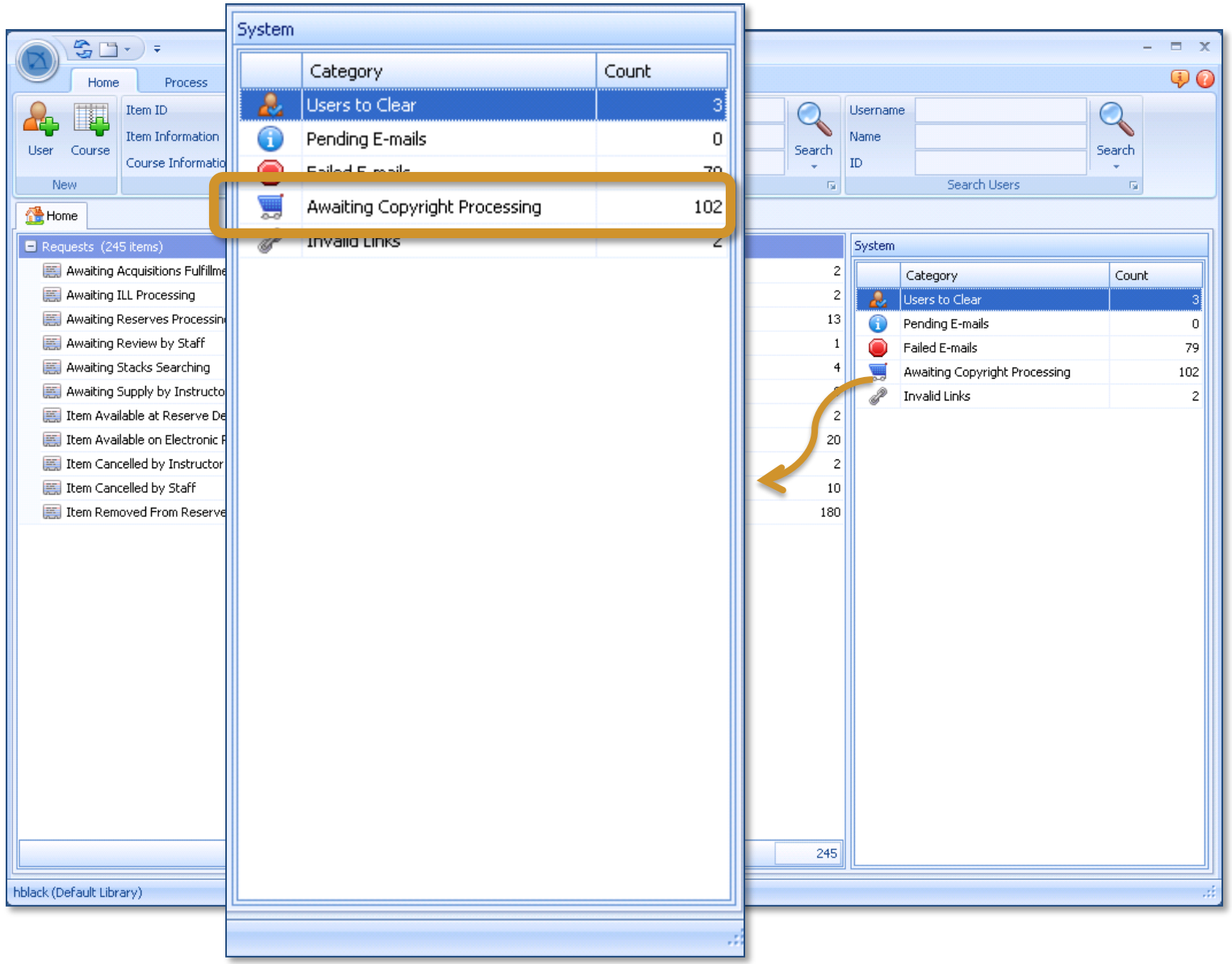
Copyright Virtual Queues

- Not to be confused with Electronic Document Management
  - Trusted Instructors
  - Trusted Document Types
  - “Awaiting Staff Review”

Copyright Virtual Queues

- Manage copyright outside of “real” workflow
  - Manage “first of term flood”
  - Allow staff to distribute work
    - Student staff pull & scan
    - Library staff monitor approve/request/manage royalty issues

Ares Copyright Processing Virtual Queue



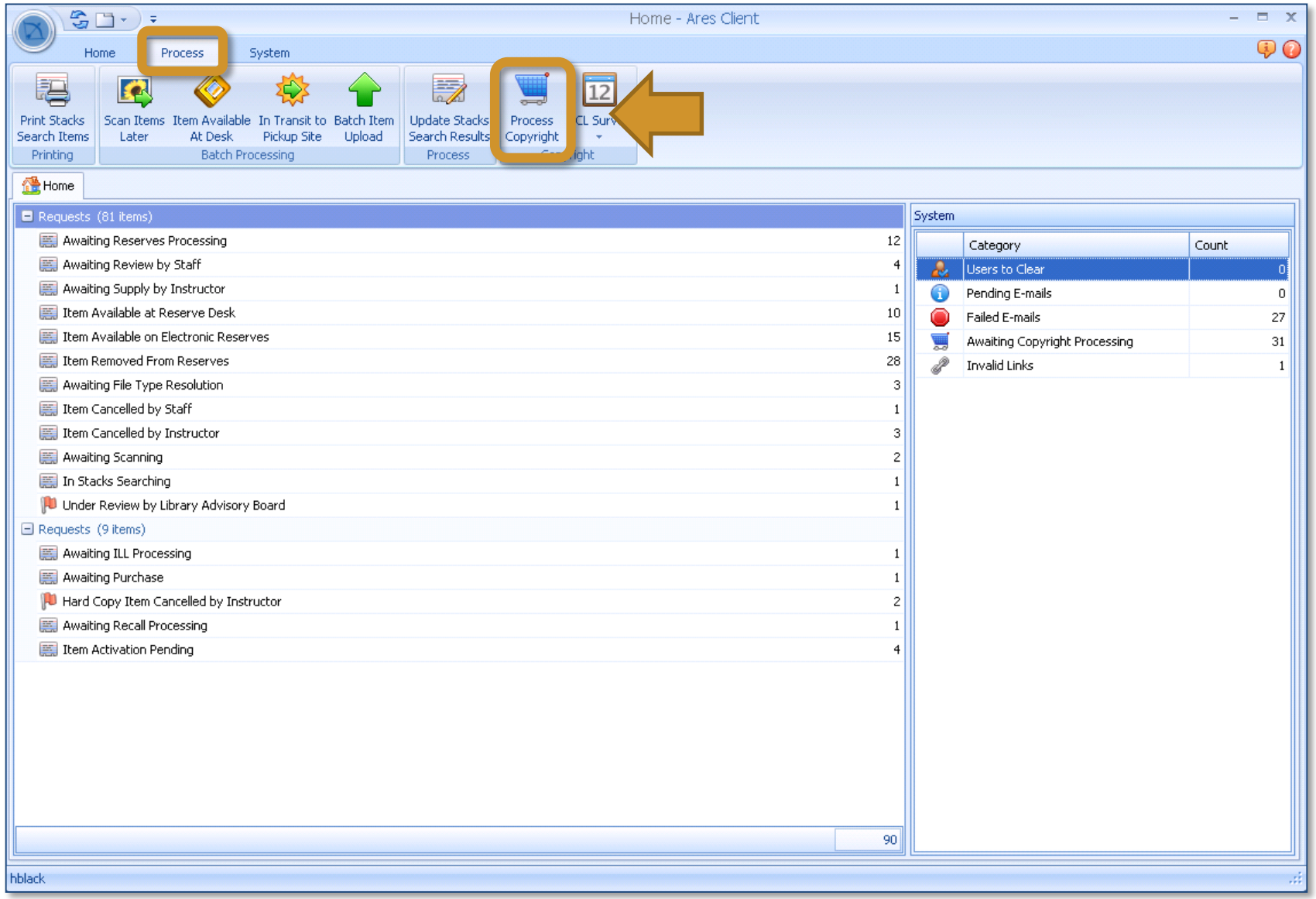
Criteria

- Awaiting Copyright Processing queue
  - Filtered by location
  - Criteria
    - **Copyright Required** is true
      - Copyright Required checkbox on Item form is checked
      - Set as default on web forms
        - » Default = Article & Book Chapter
    - **Copyright Obtained** is false
      - Copyright Obtained checkbox on Item form is not checked
      - Set as default on web forms
        - » Default = Book, Audio, Video, etc.

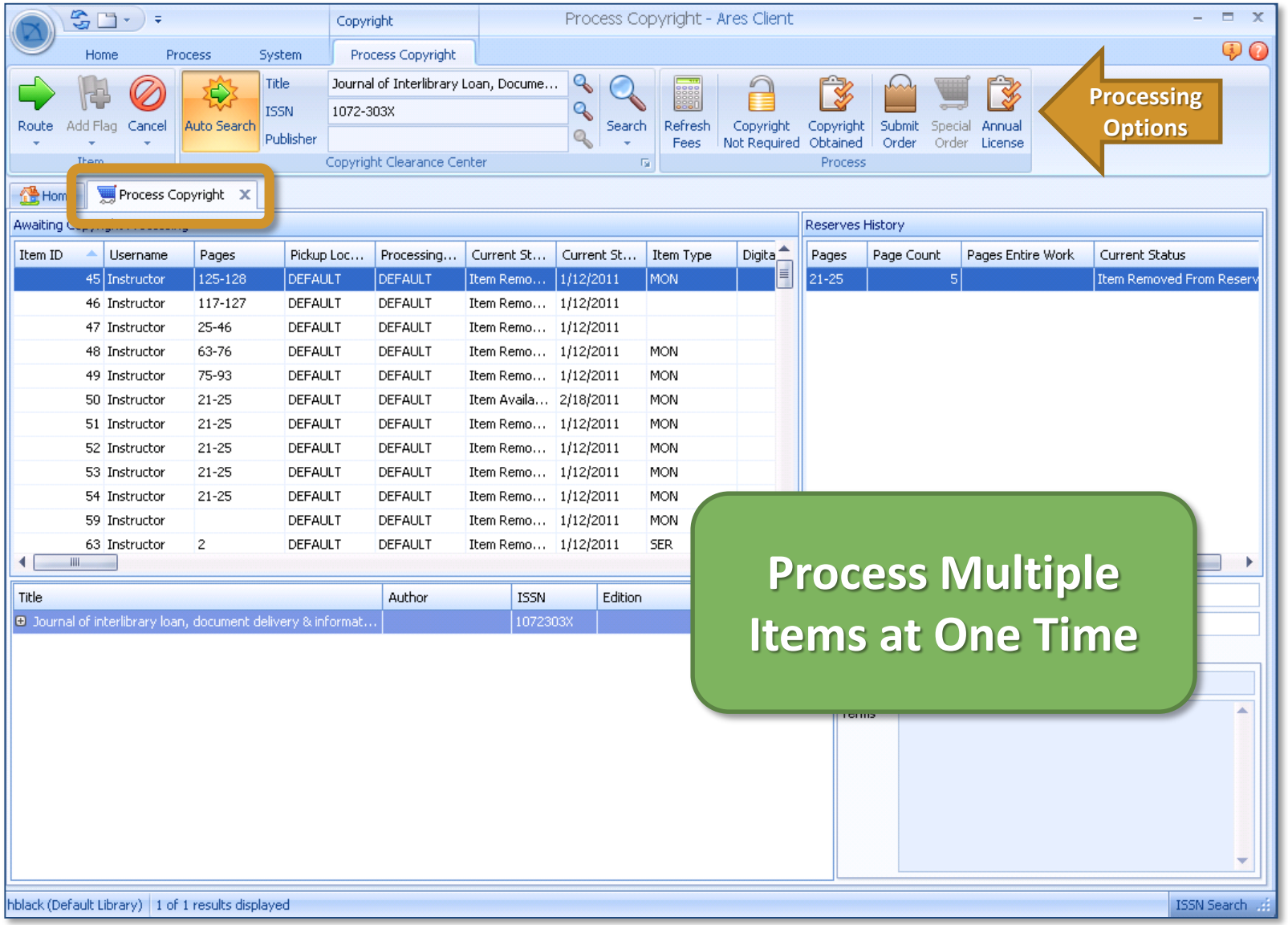
Criteria

- Awaiting Copyright Processing queue
  - Filtered by location
  - Criteria
    - No entries in the ItemCopyright table
      - No record of existing order to CCC or other rightsholder
      - No information recorded on the Copyright | History tab of the Item Record
    - Status is not:
      - Awaiting Supply by Instructor
      - Item Submitted
      - Item Cancelled by Staff
      - Item Cancelled by Instructor

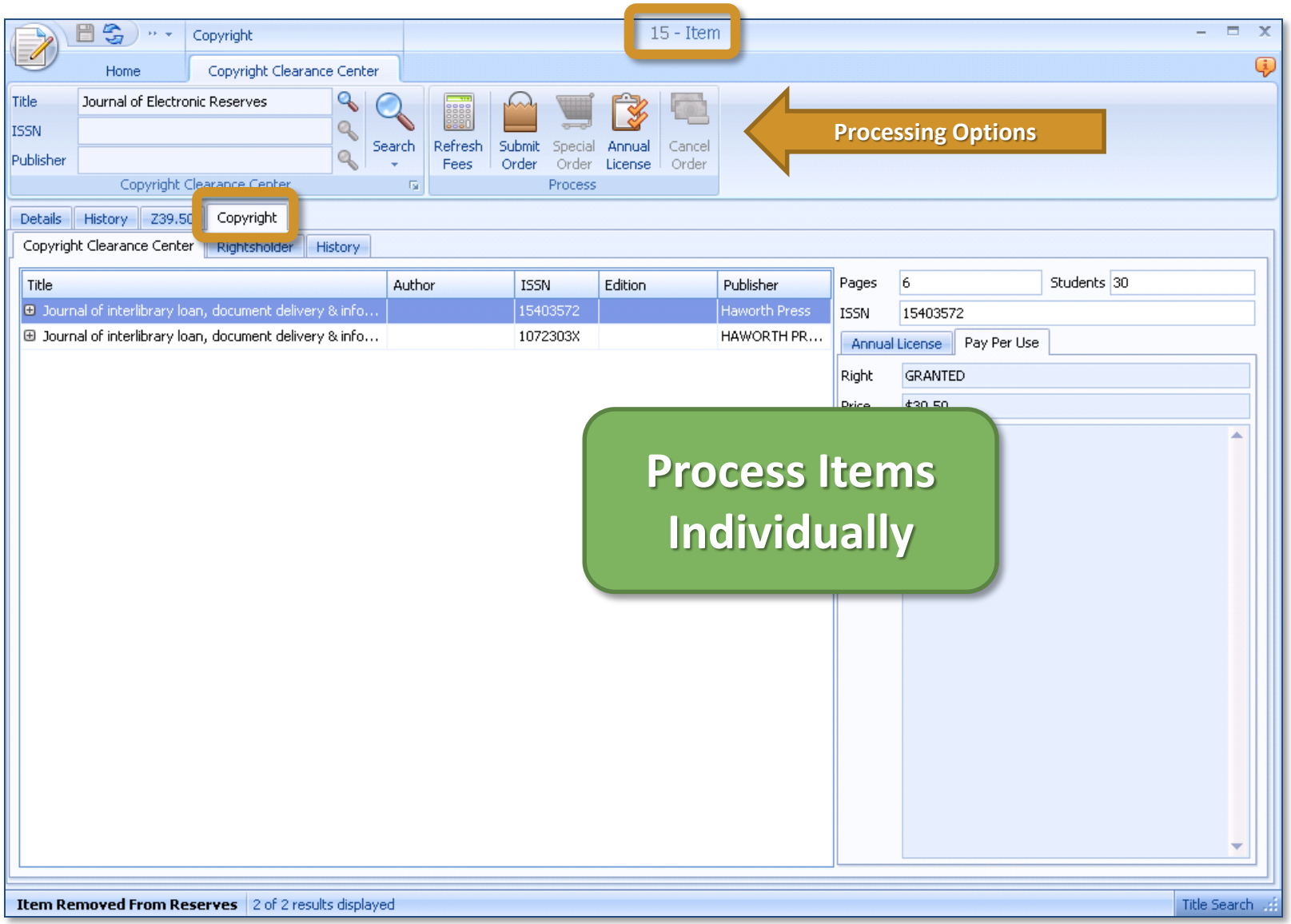
Ares Copyright Processing Virtual Queue



Batch Processing



Item Form


15 - Item
Copyright
Home
Copyright Clearance Center
Title
Journal of Electronic Reserves
ISSN
Publisher
Search
Refresh Fees
Submit Order
Special Order
Annual License
Cancel Order
Copyright Clearance Center
Process
Processing Options
Details
History
Z39.50
Copyright
Copyright Clearance Center
Rightsholder
History
Title
Author
ISSN
Edition
Publisher
Journal of interlibrary loan, document delivery & info...
15403572
Haworth Press
Journal of interlibrary loan, document delivery & info...
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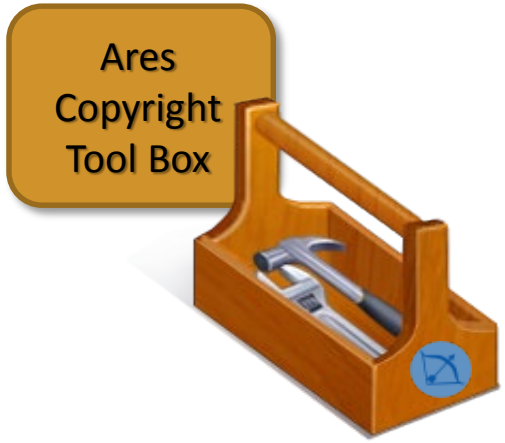
HAWORTH PR...
Pages
6
Students
30
ISSN
15403572
Annual License
Pay Per Use
Right
GRANTED
Process Items Individually
Item Removed From Reserves
2 of 2 results displayed
Title Search

Ares Copyright Processing

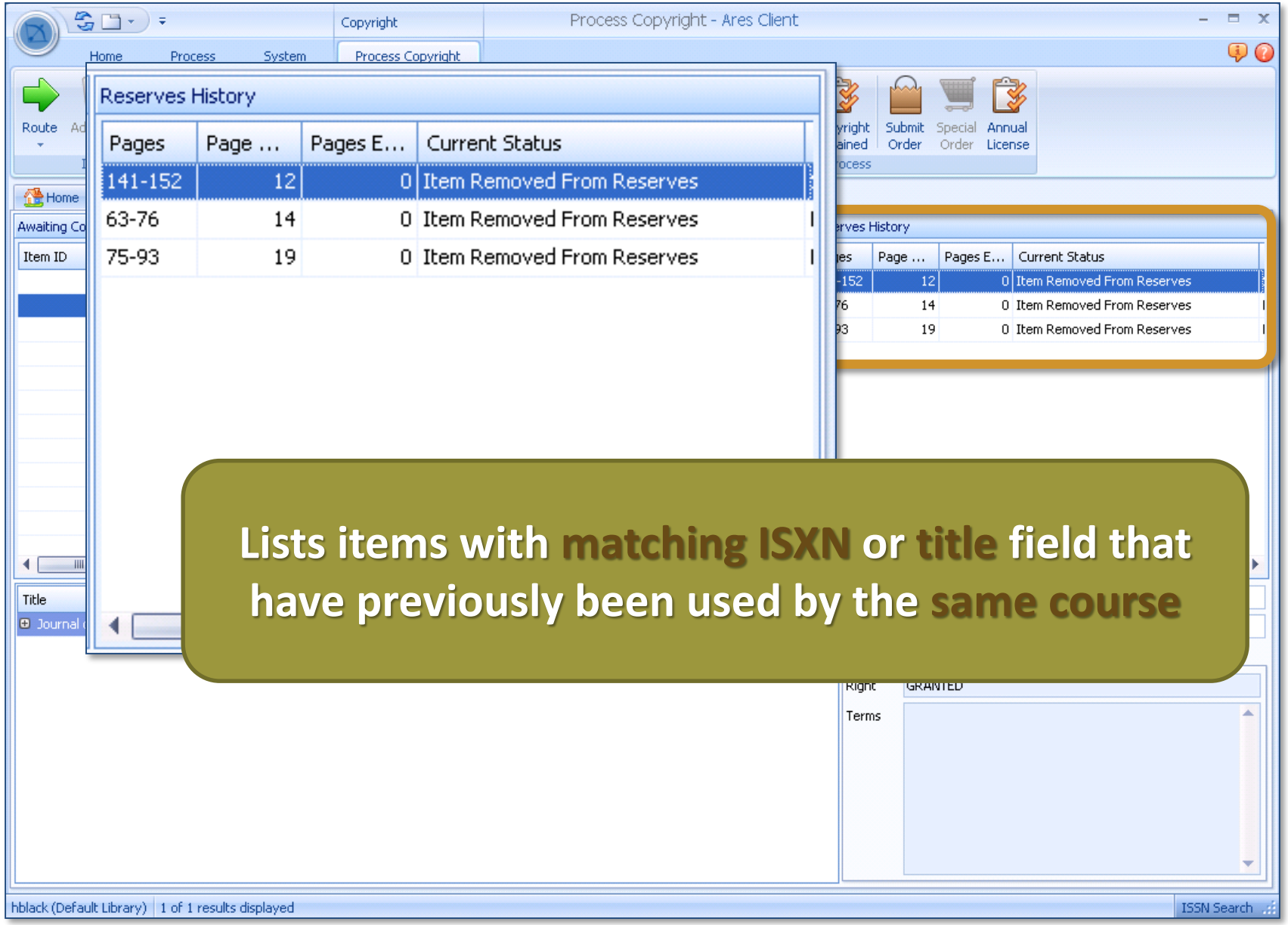
DECISION MAKING TOOLS

Decision Making Tools

- **Reserves History**
  - Determine the need for royalty payment based on your local policies

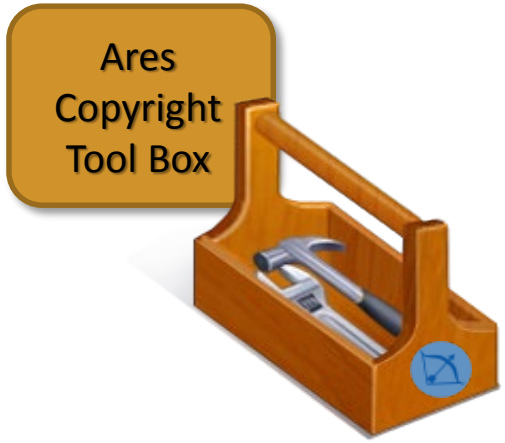


Reserves History Grid

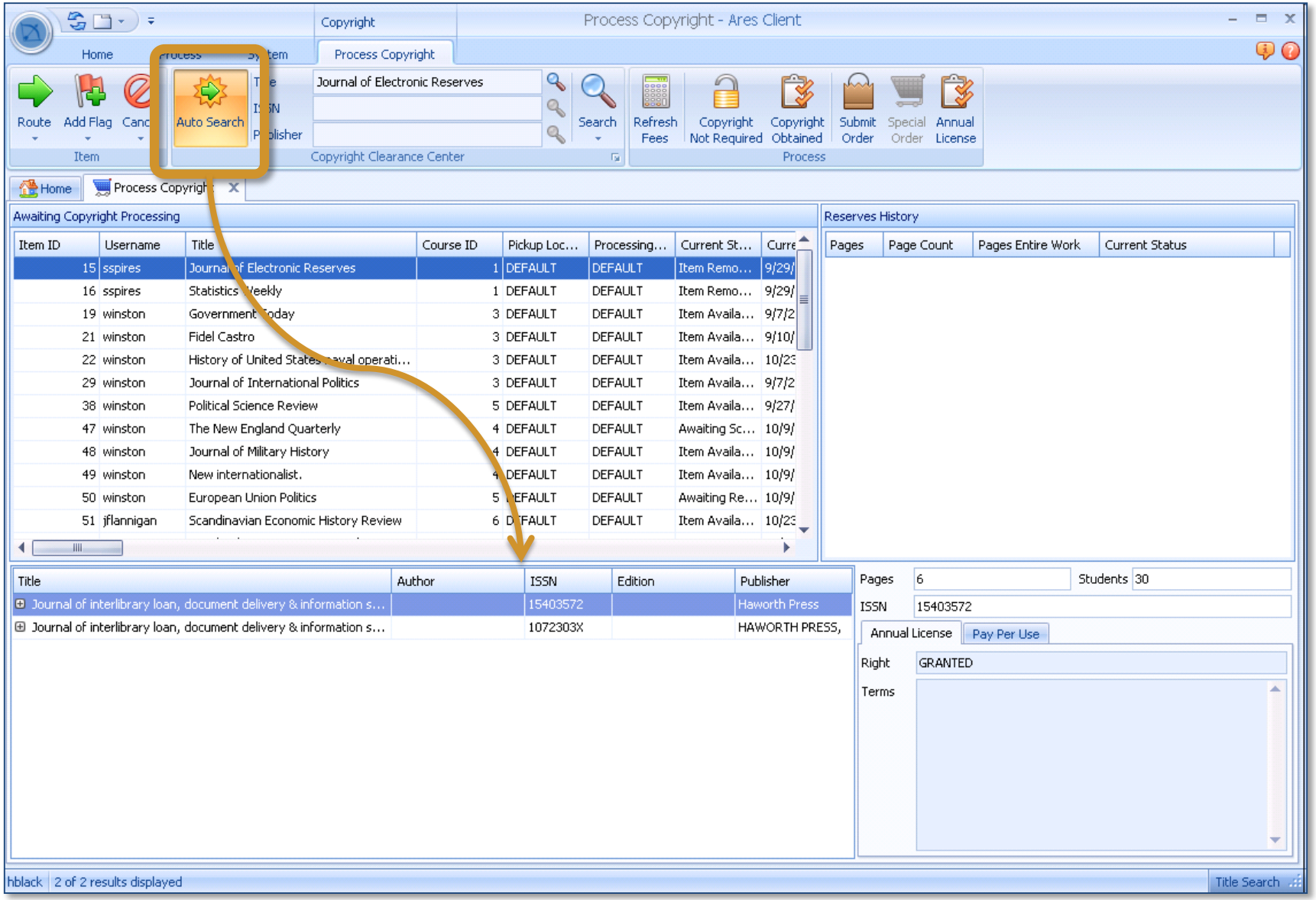


Decision Making Tools

- **Copyright Clearance Center Gateway Search**
  - Determine rights availability and pricing at the Copyright Clearance Center
  - No direct invoicing from CCC required



CCC Search


Copyright
Process Copyright - Ares Client
Home
Process Copyright
Journal of Electronic Reserves
Route
Add Flag
Auto Search
Search
Refresh Fees
Copyright Not Required
Copyright Obtained
Submit Order
Special Order
Annual License
Item
Copyright Clearance Center
Process
Home
Process Copyright
Awaiting Copyright Processing
Item ID | Username | Title | Course ID | Pickup Loc... | Processing... | Current St... | Curre
15 | sspires | Journal of Electronic Reserves | 1 | DEFAULT | DEFAULT | Item Remo... | 9/29/
16 | sspires | Statistics Weekly | 1 | DEFAULT | DEFAULT | Item Remo... | 9/29/
19 | winston | Government Today | 3 | DEFAULT | DEFAULT | Item Availa... | 9/7/2
21 | winston | Fidel Castro | 3 | DEFAULT | DEFAULT | Item Availa... | 9/10/
22 | winston | History of United States naval operati... | 3 | DEFAULT | DEFAULT | Item Availa... | 10/23
29 | winston | Journal of International Politics | 3 | DEFAULT | DEFAULT | Item Availa... | 9/7/2
38 | winston | Political Science Review | 5 | DEFAULT | DEFAULT | Item Availa... | 9/27/
47 | winston | The New England Quarterly | 4 | DEFAULT | DEFAULT | Awaiting Sc... | 10/9/
48 | winston | Journal of Military History | 4 | DEFAULT | DEFAULT | Item Availa... | 10/9/
49 | winston | New internationalist. | 4 | DEFAULT | DEFAULT | Item Availa... | 10/9/
50 | winston | European Union Politics | 5 | DEFAULT | DEFAULT | Awaiting Re... | 10/9/
51 | jflannigan | Scandinavian Economic History Review | 6 | DEFAULT | DEFAULT | Item Availa... | 10/23
Reserves History
Pages | Page Count | Pages Entire Work | Current Status
Title | Author | ISSN | Edition | Publisher
Journal of interlibrary loan, document delivery & information s... | | 15403572 | | Haworth Press
Journal of interlibrary loan, document delivery & information s... | | 1072303X | | HAWORTH PRESS,
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Annual License
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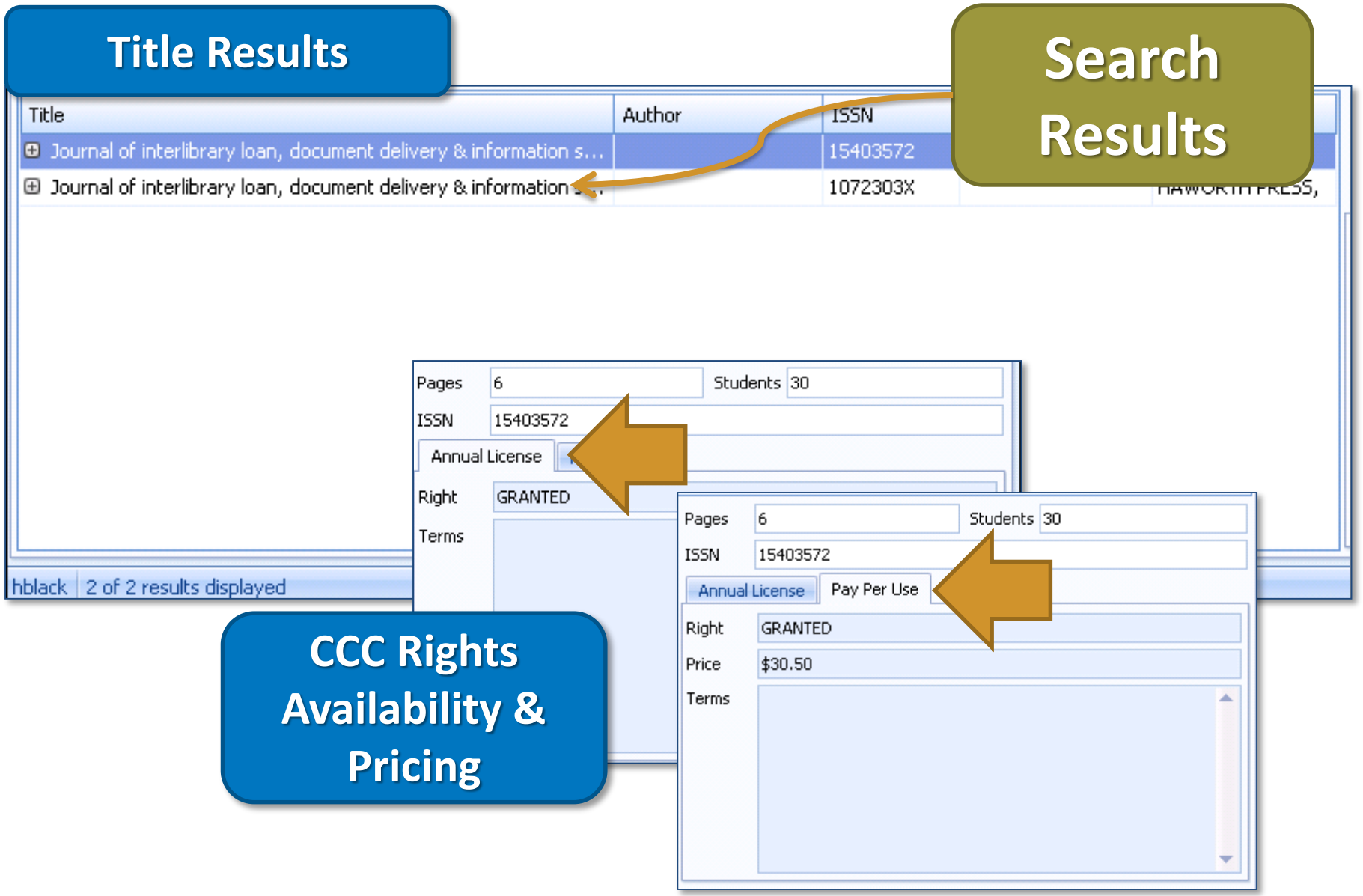
2 of 2 results displayed
Title Search

CCC Search


Title Results
Search Results
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Author
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Journal of interlibrary loan, document delivery & information s...
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Price
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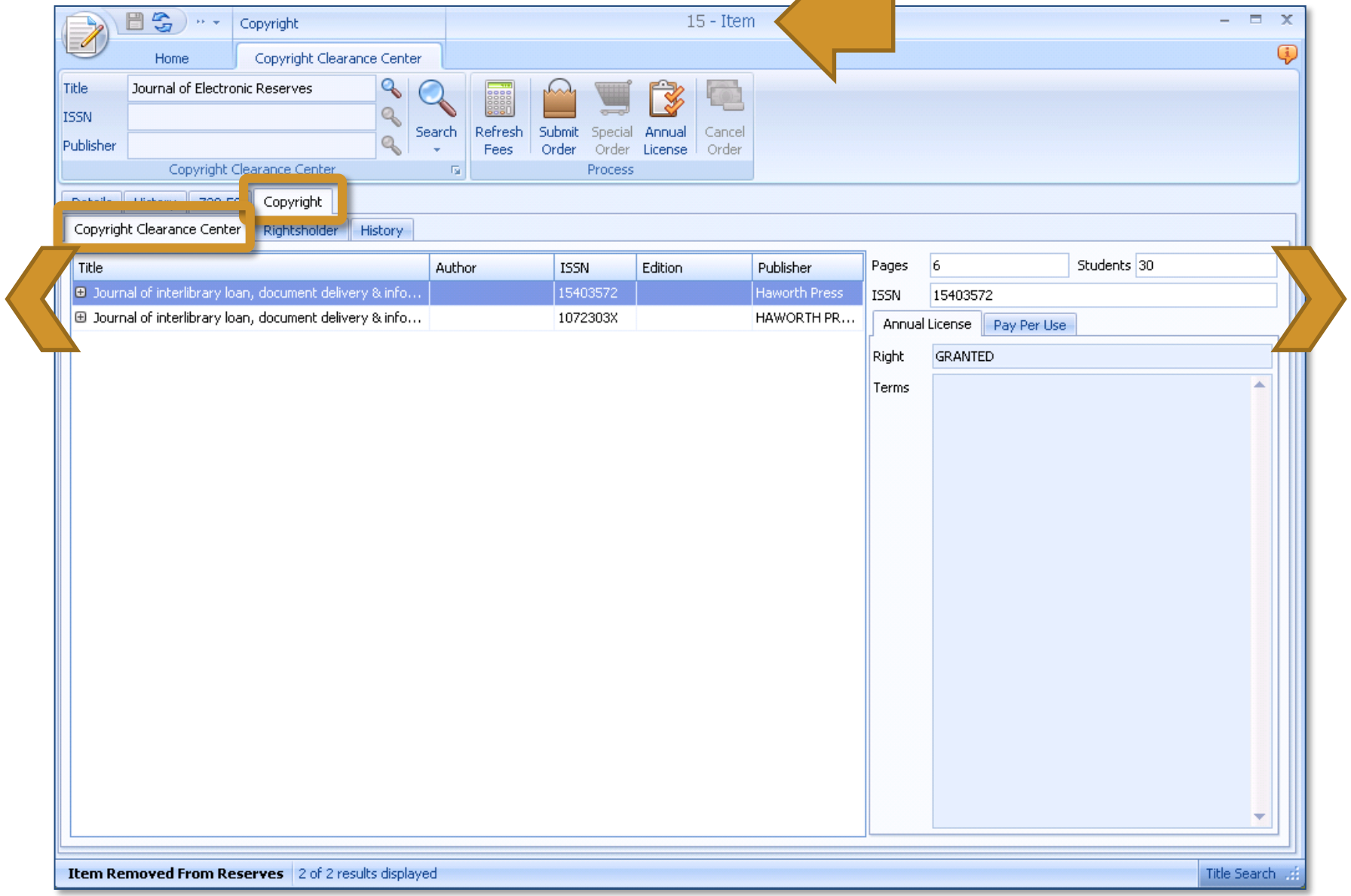
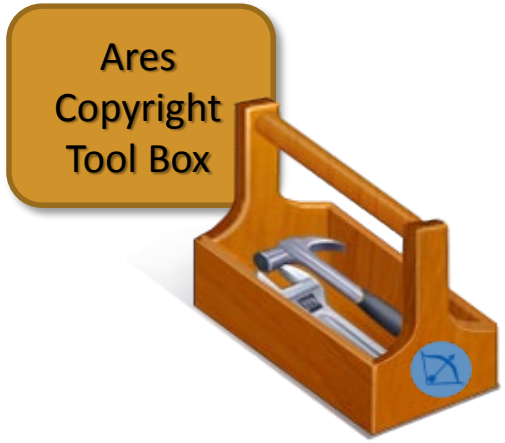
Terms
CCC Rights Availability & Pricing

CCC Search on Item Form

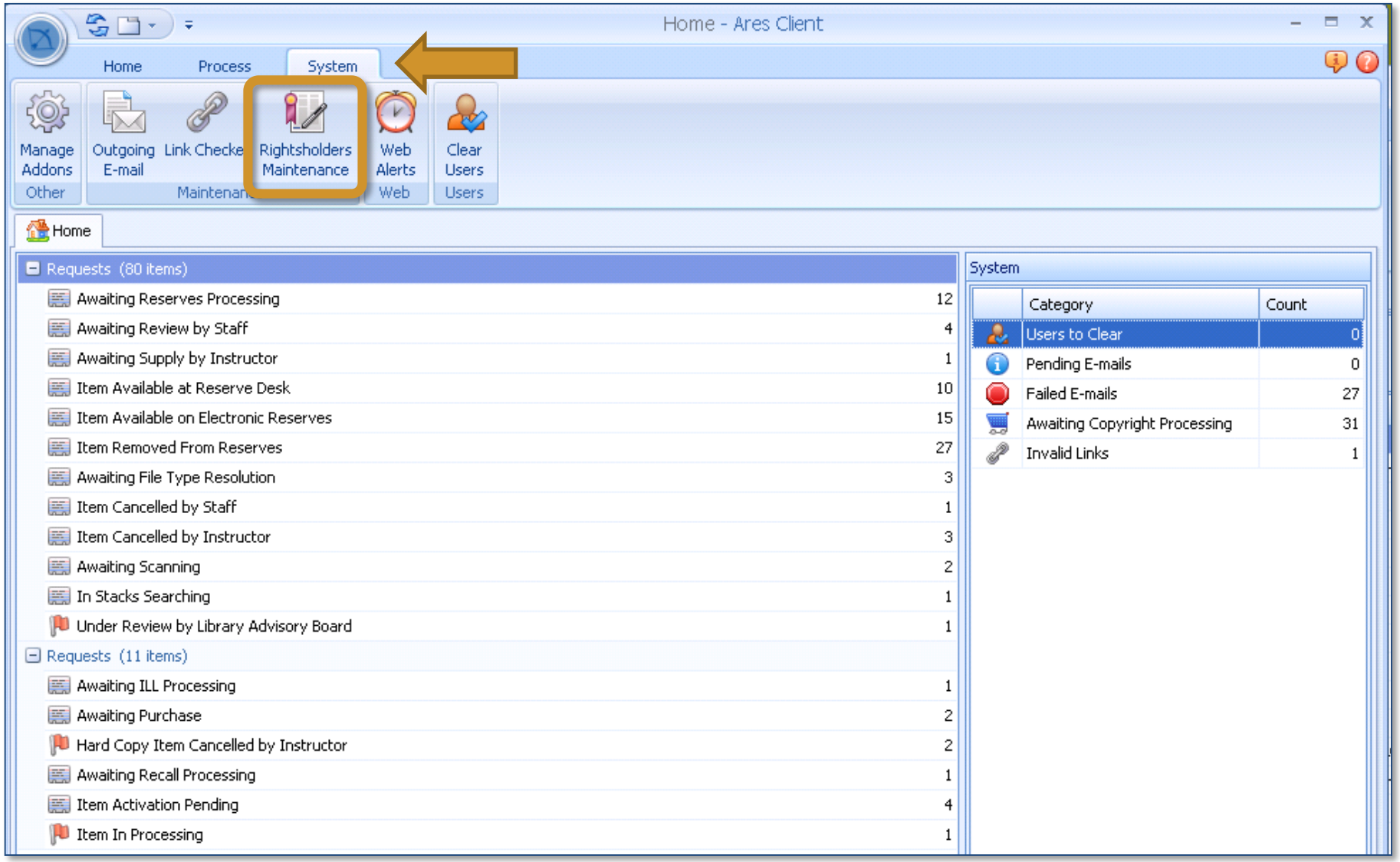


Decision Making Tools

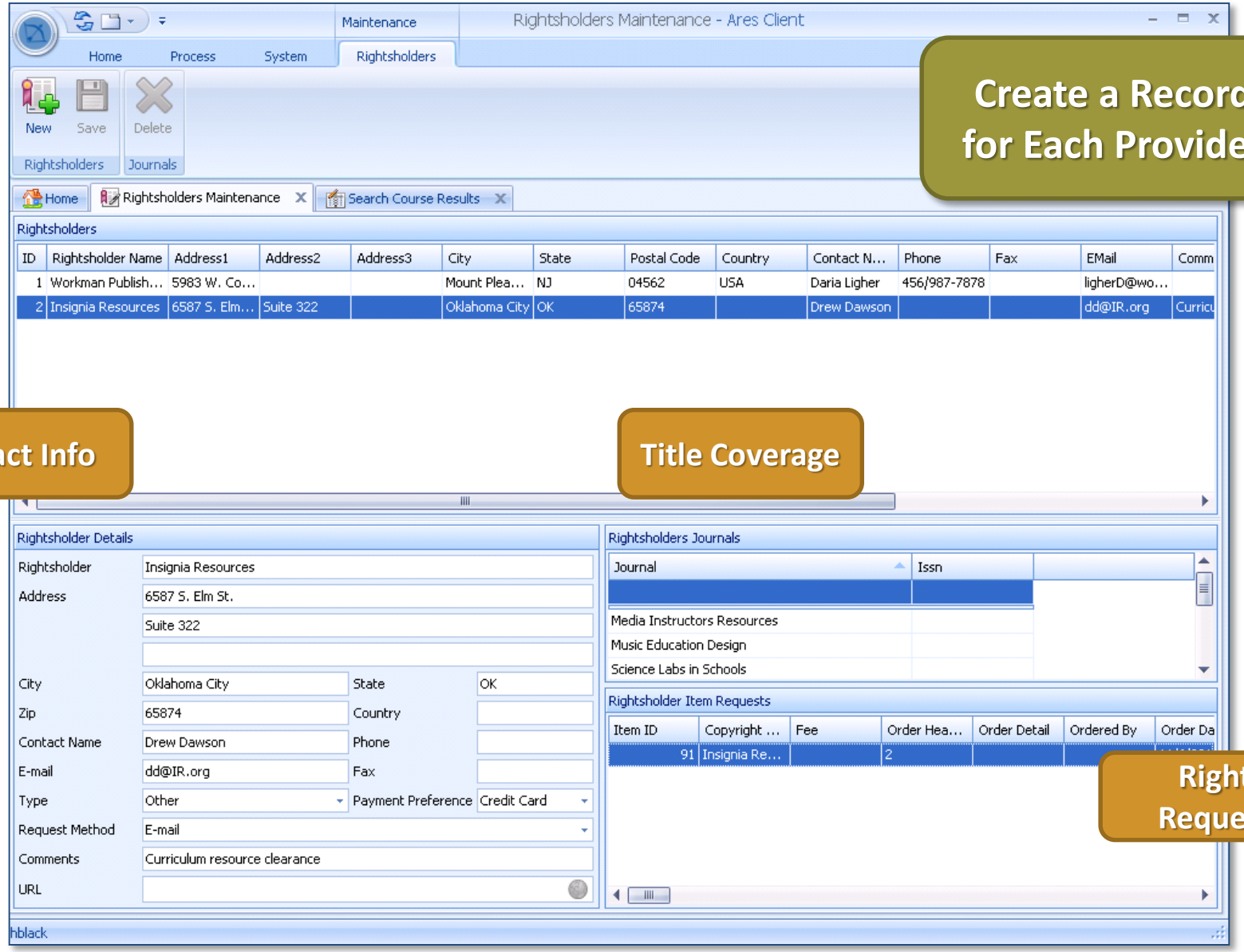
- **Alternate Rightsholders**
  - Track communication and pricing of rights/permissions from sources outside the CCC
    - E.G. Direct from publisher or other copyright owner
  - Requires establishment of Rightsholder records in Ares



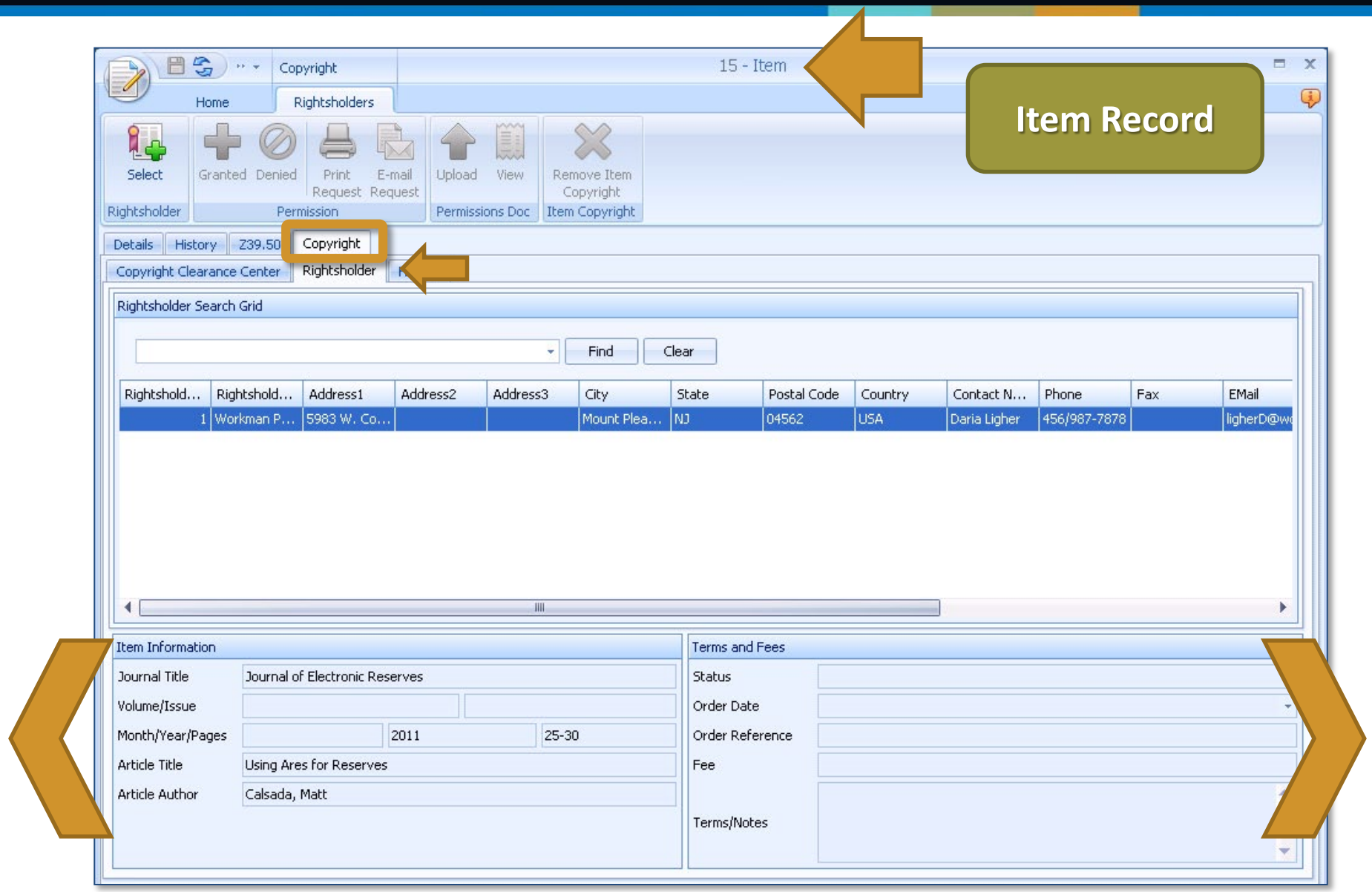
Rightsholder Maintenance



Rightsholder Maintenance



Rights Holder

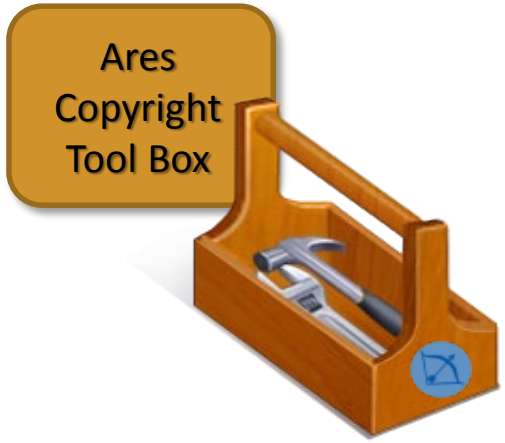


Ares Copyright Processing

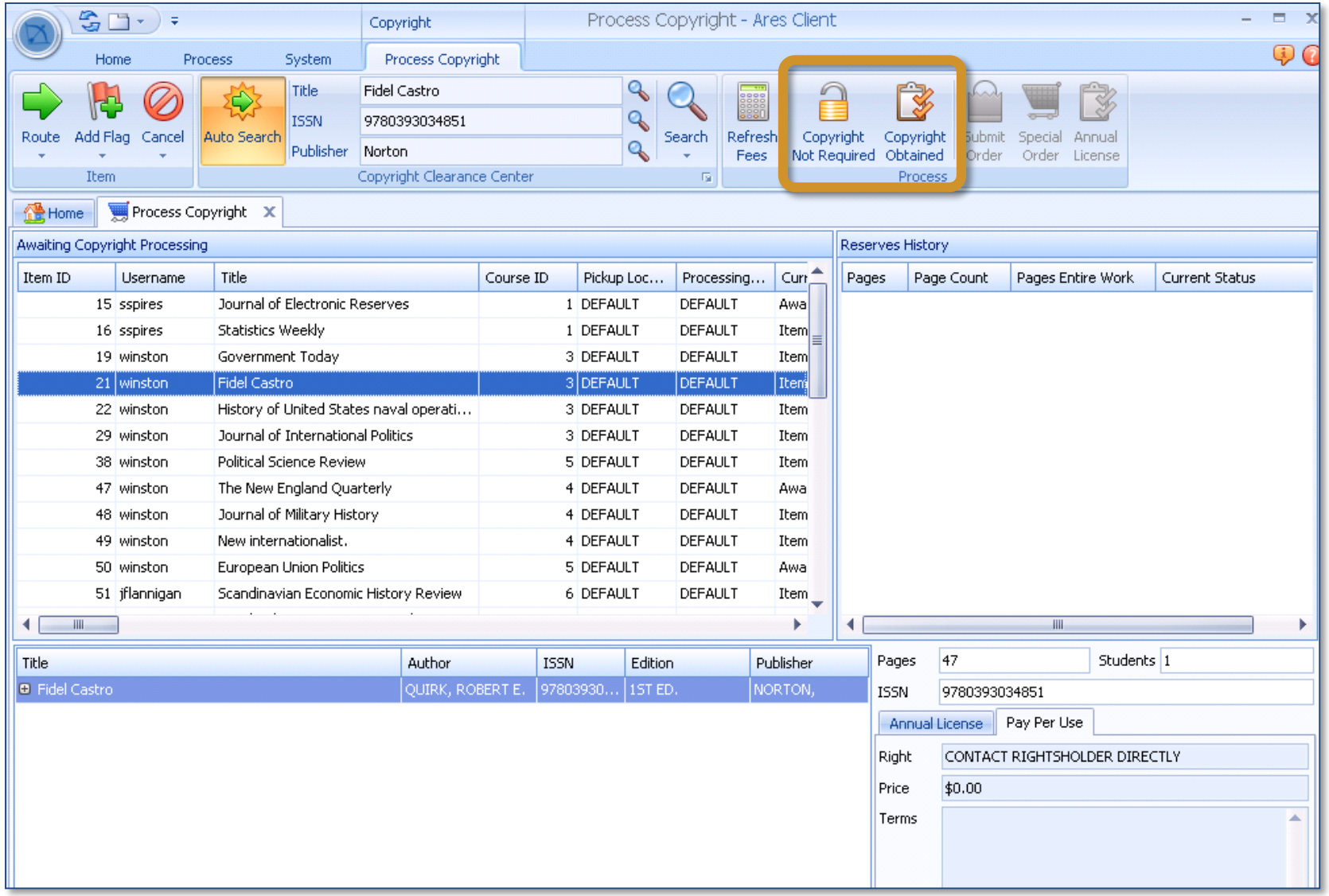
PROCESSING TOOLS

Processing Tools

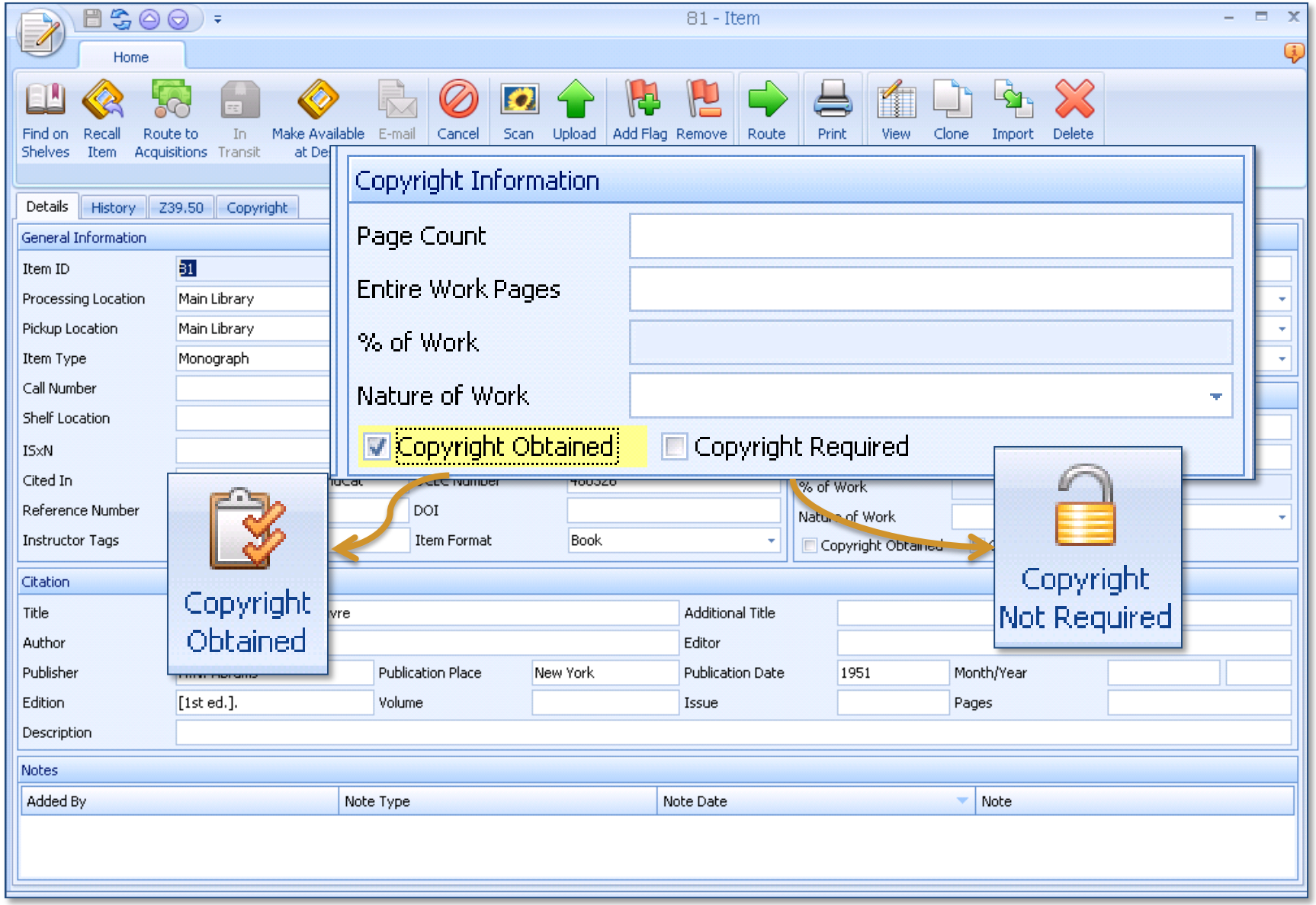
- **Basic Processing**
  - For use with items that do not require royalty processing



Not Required or Obtained

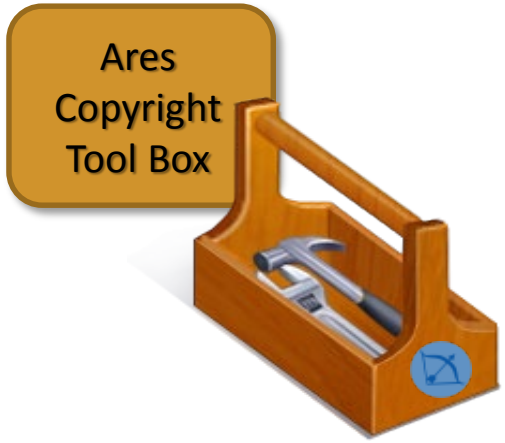


Basic Processing on Item Form

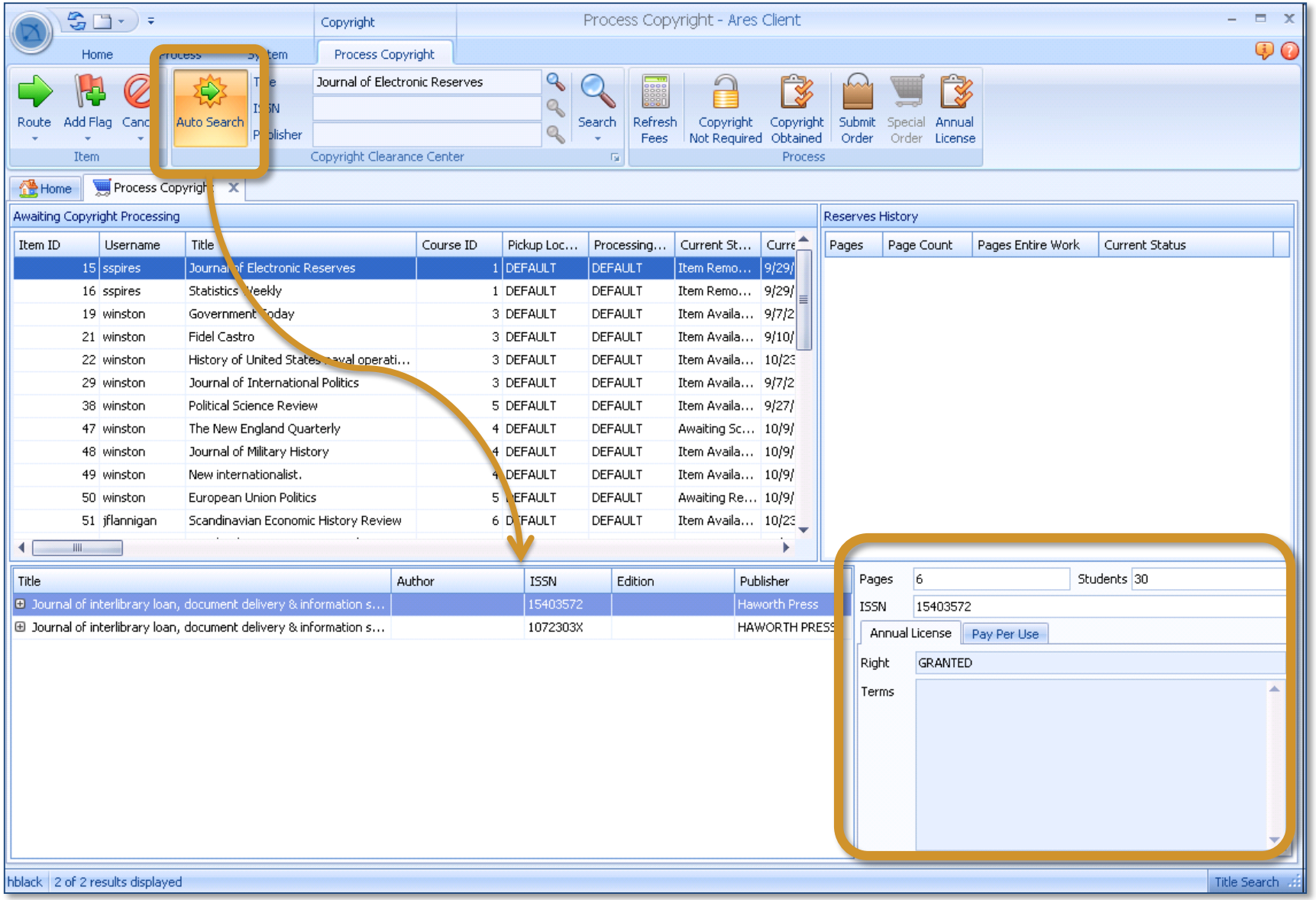


Processing Tools

- **Copyright Clearance Center**
  - Rights Statuses
  - Invoicing Process
  - Pay Per Use
  - Annual License



CCC Search


Copyright
Process Copyright - Ares Client
Home
Process Copyright
Journal of Electronic Reserves
Route
Add Flag
Auto Search
Search
Refresh Fees
Copyright Not Required
Copyright Obtained
Submit Order
Special Order
Annual License
Item
Copyright Clearance Center
Process
Home
Process Copyright
Awaiting Copyright Processing
Item ID | Username | Title | Course ID | Pickup Loc... | Processing... | Current St... | Curre
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16 | sspires | Statistics Weekly | 1 | DEFAULT | DEFAULT | Item Remo... | 9/29/
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ISSN 15403572
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Pay Per Use
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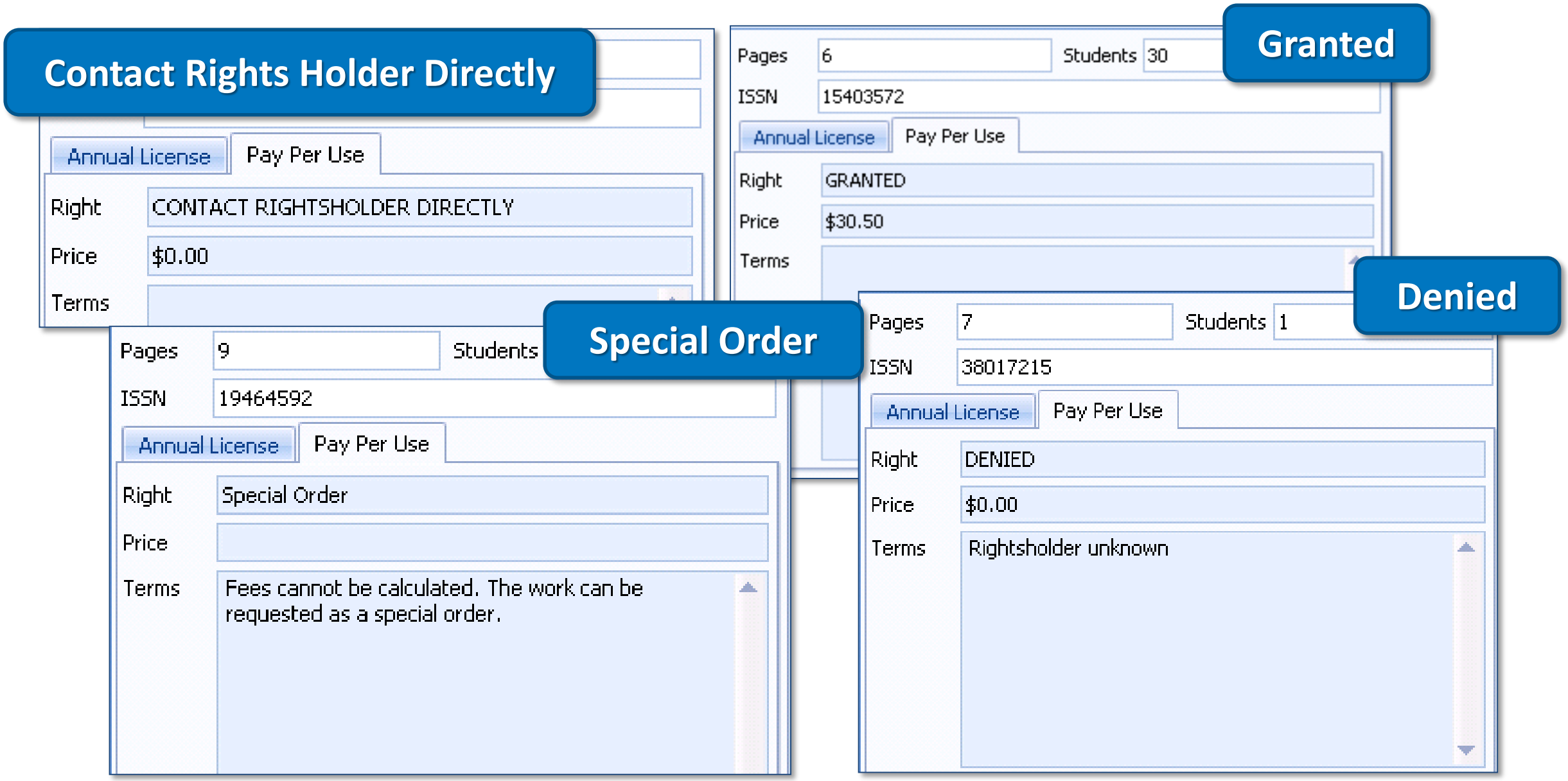
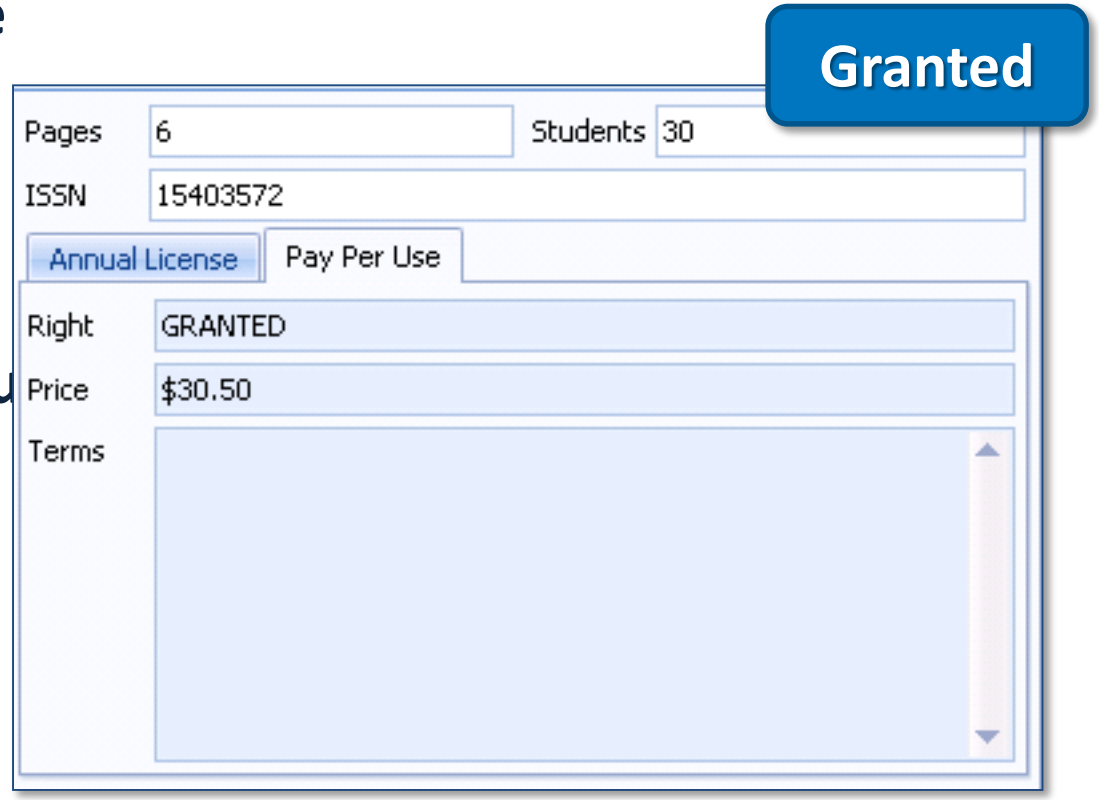
Title Search

Right Statuses



Fee Calculation & Invoicing

- Calculated based on number of enrolled students in course
  - **Enrolled Students**
    - Enrollment field on the **Create a Course** page or
    - From course data load
  - **Ares Students**
    - Students registered for the course **throu** **Ares**



Fee Calculation & Invoicing

- Ares sends updates daily
  - Changes in course enrollment numbers
- CCC invoices 60 days after the "start of term" date provided upon order entry
- Cannot cancel after invoicing

CCC Documentation

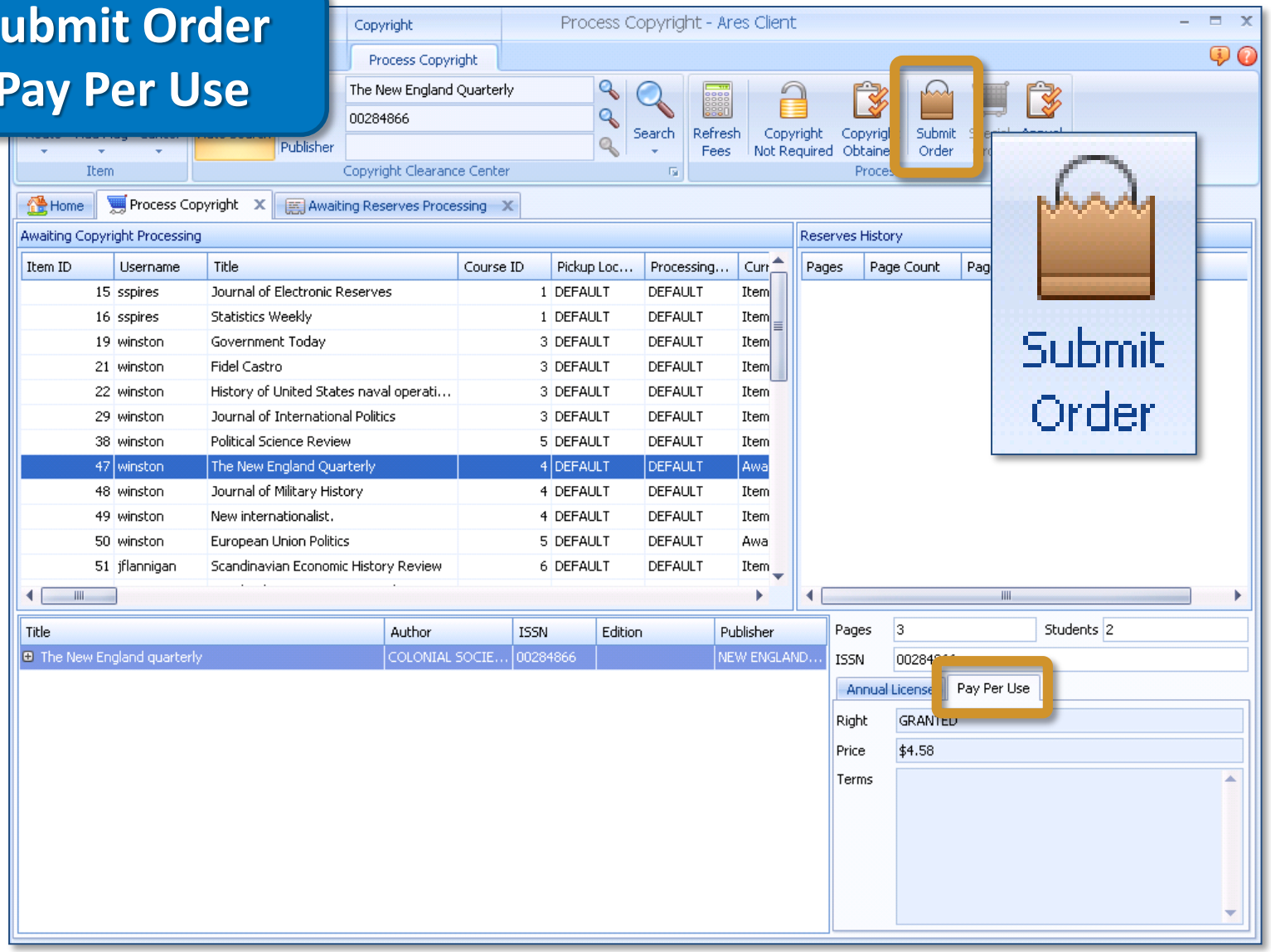
http://support.copyright.com/index.php?action=article&id=17&relid=11

CCC Flagging

- **Copyright Granted**
  - Items that have been granted permission via special order
  - Customization Manager key needs to be set
    - System | Copyright | CopyrightAlertGranted
- **Copyright Denied**
  - Items that have been denied permission via special order
- **Fee Reduced**
  - Items that have reduced fees after daily CCC status update
  - Customization Manager key needs to be set
    - System | Copyright | CopyrightAlertFeeReduced
- **Fee Increased**
  - Items that have reduced fees after daily CCC status update

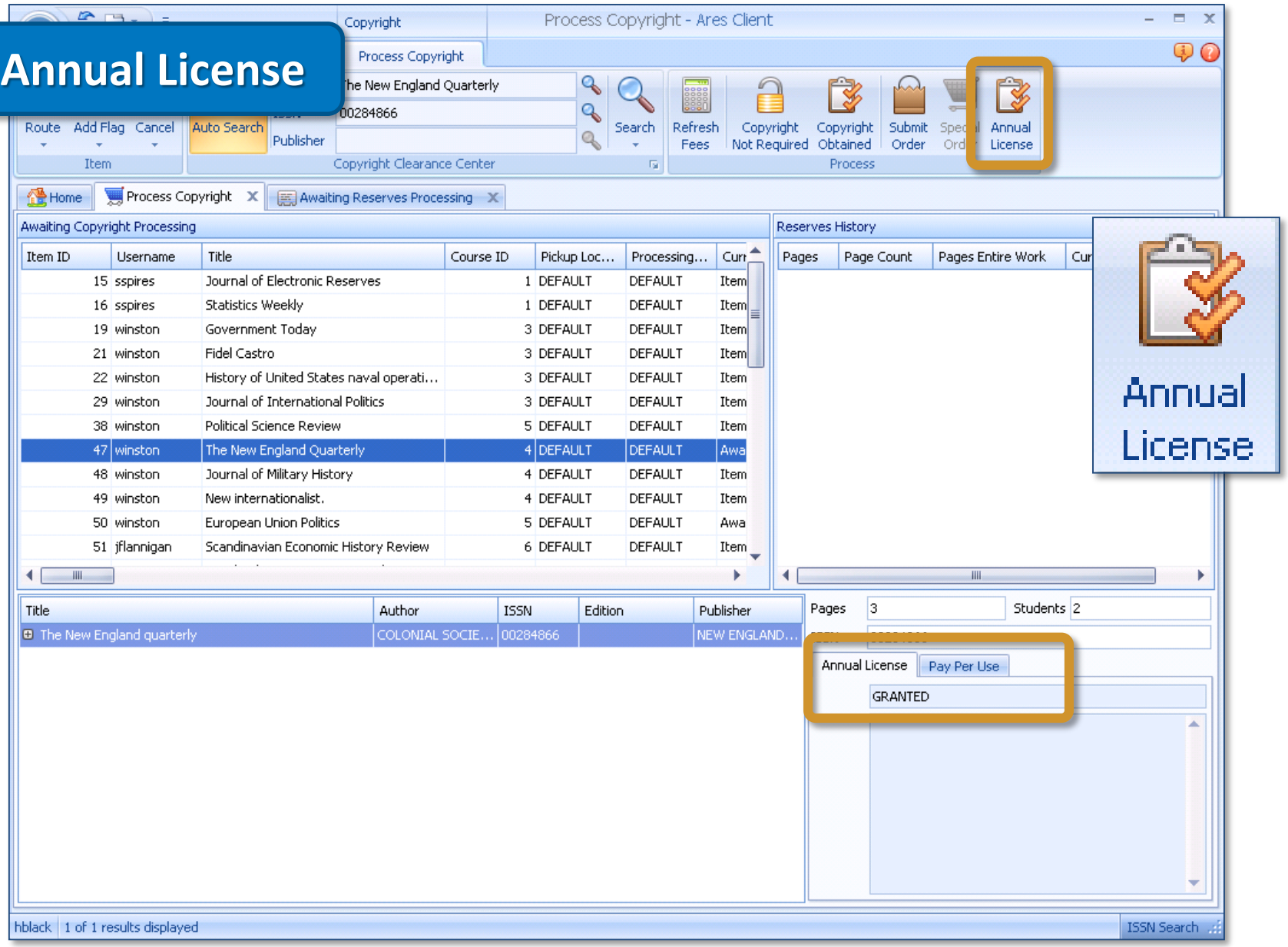
CCC Workflow

Submit Order
Pay Per Use



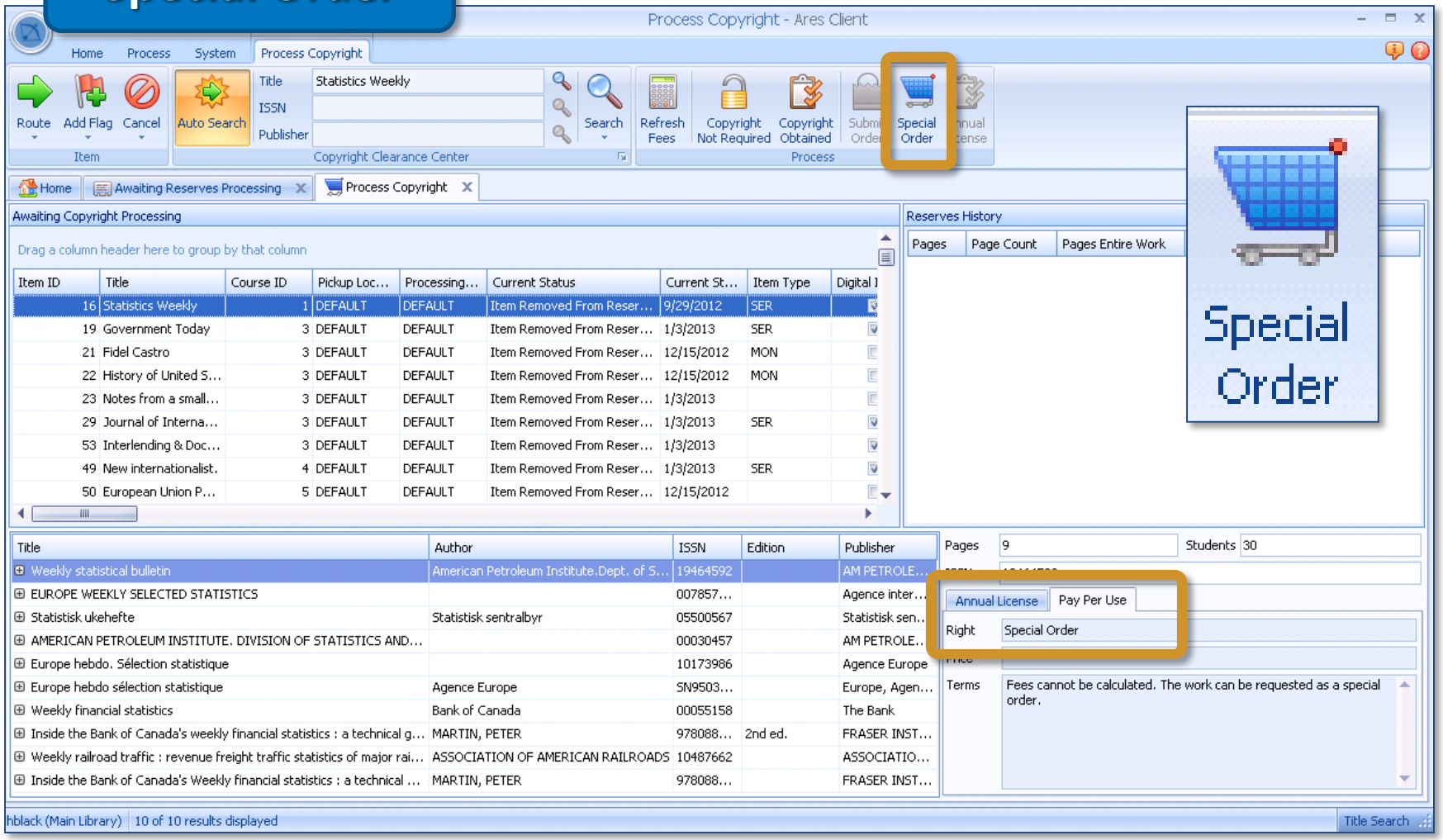
CCC Workflow

Annual License

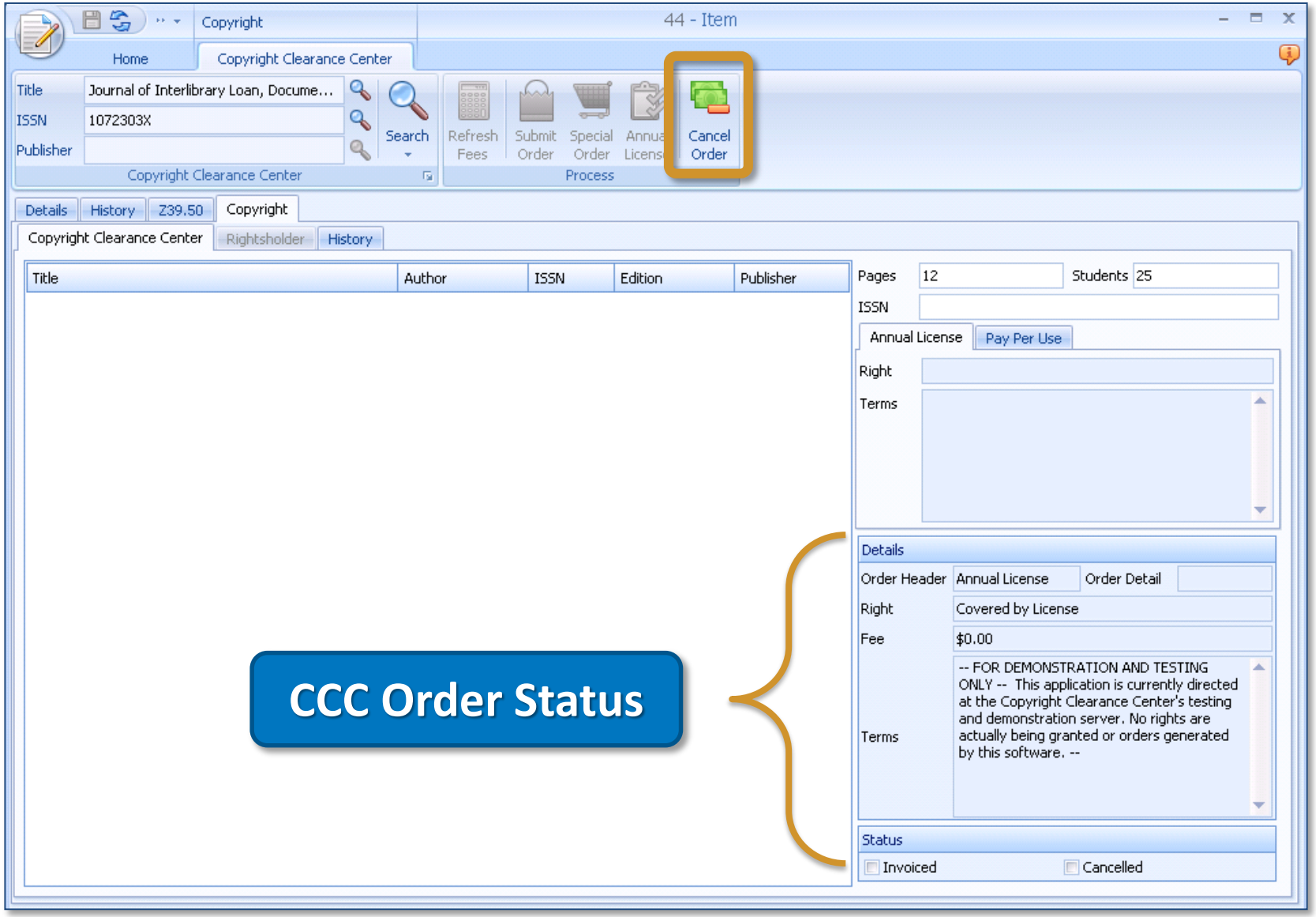


CCC Workflow

Special Order

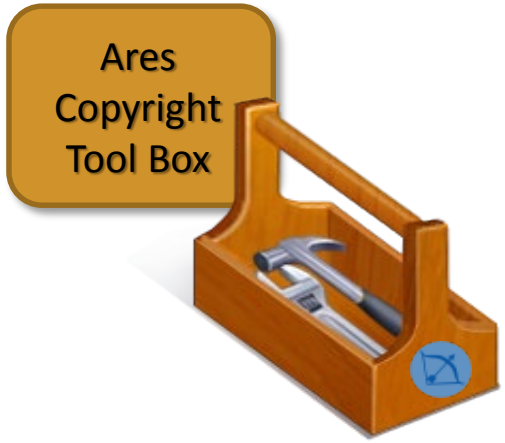


Check order status

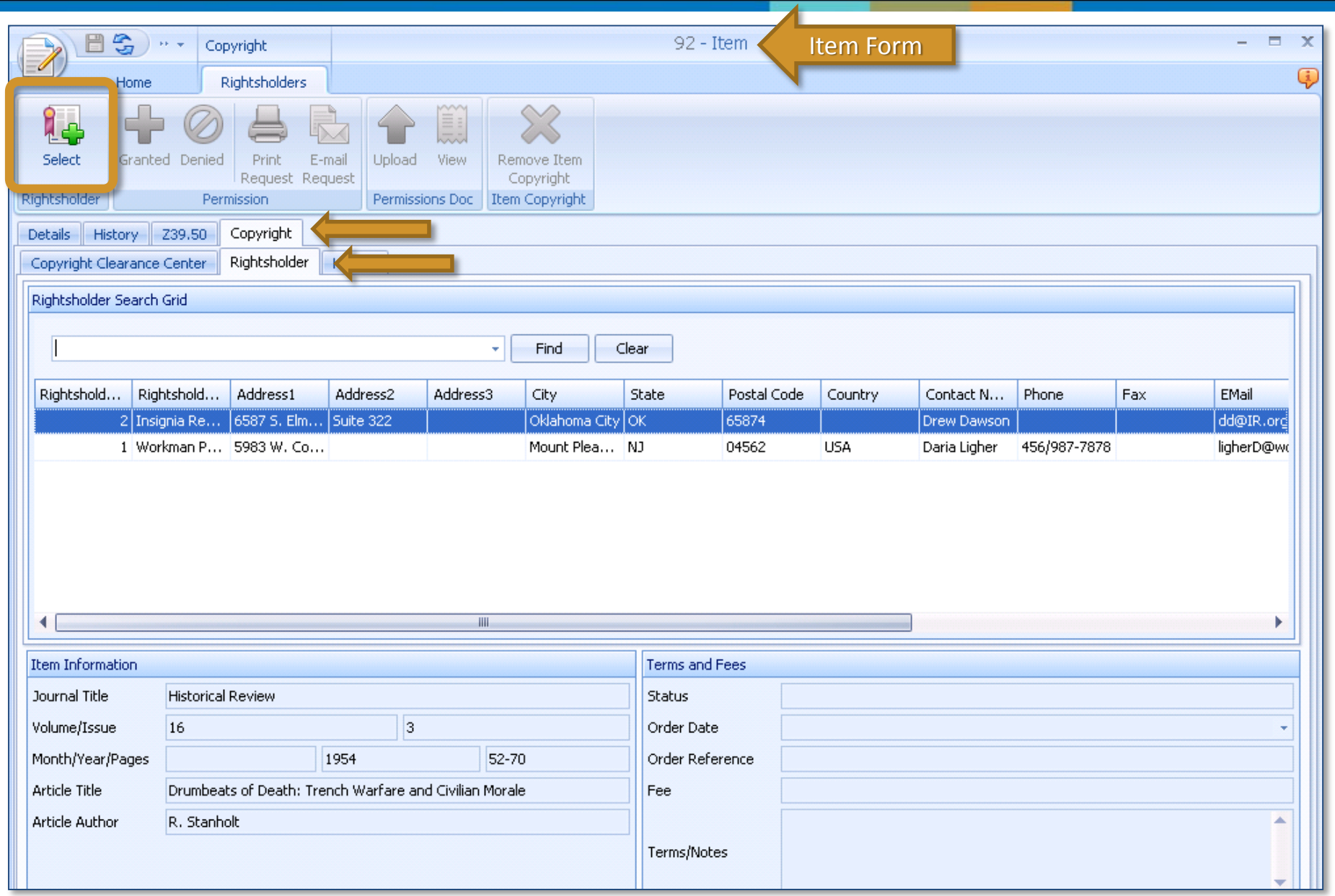


Processing Tools

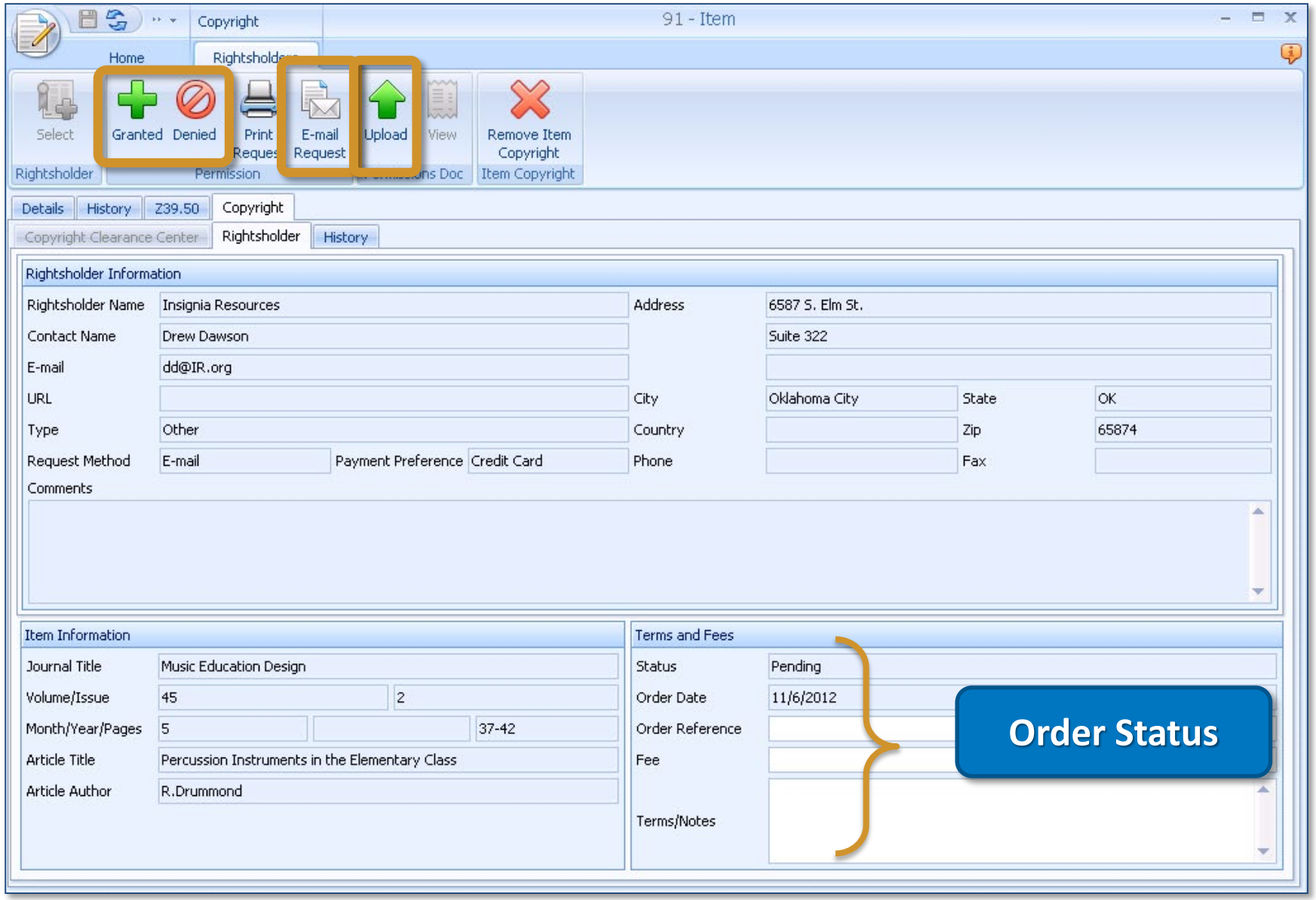
- **Alternate Rightsholder**
  - Request permission from rightsholder
  - Track status of request



Alternate Rightsholder Processing



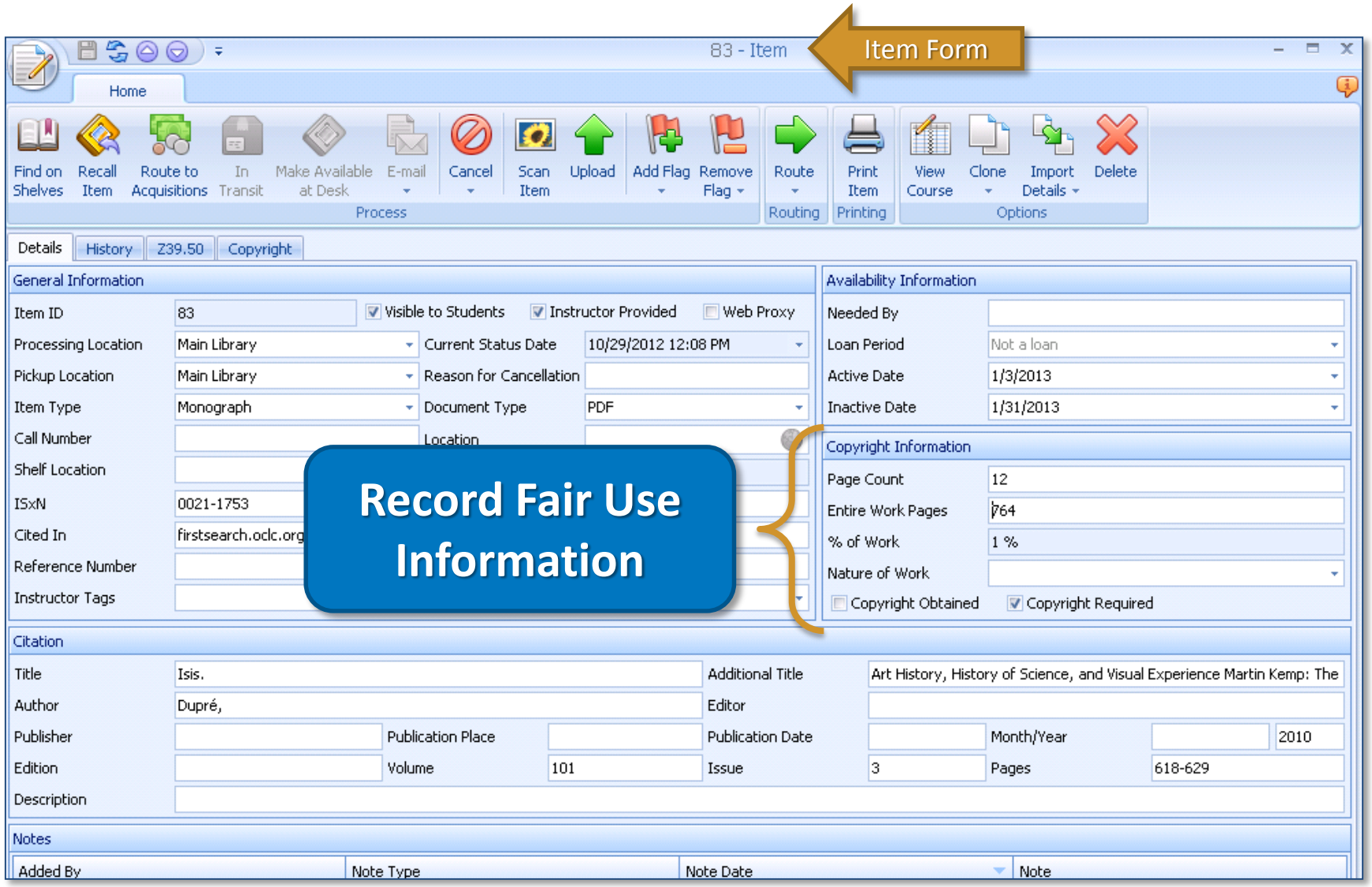
Alternate Rightsholder Processing



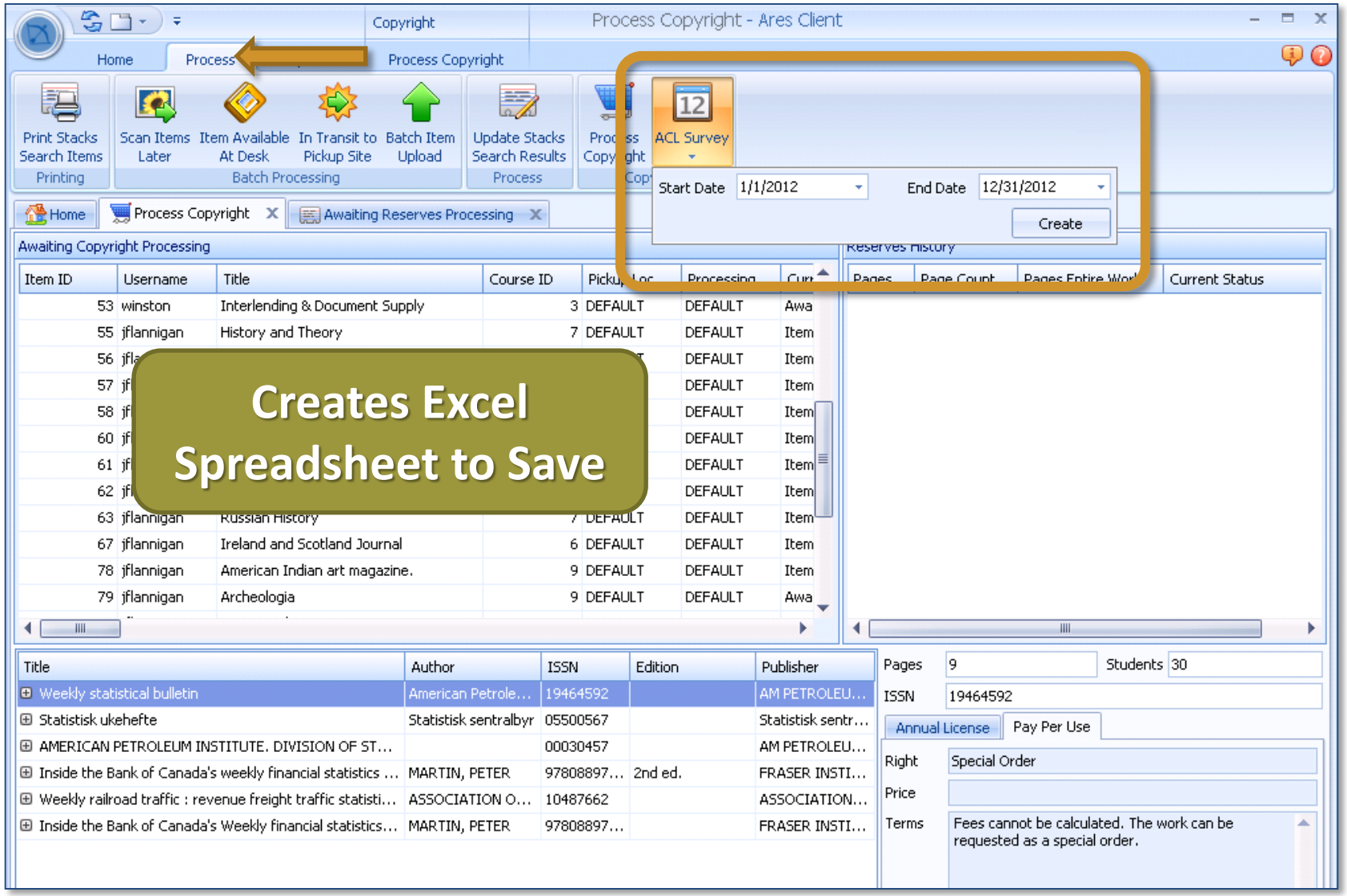
Ares Copyright Processing

MISCELLANY

Book Chapter Info



CCC Annual License Report

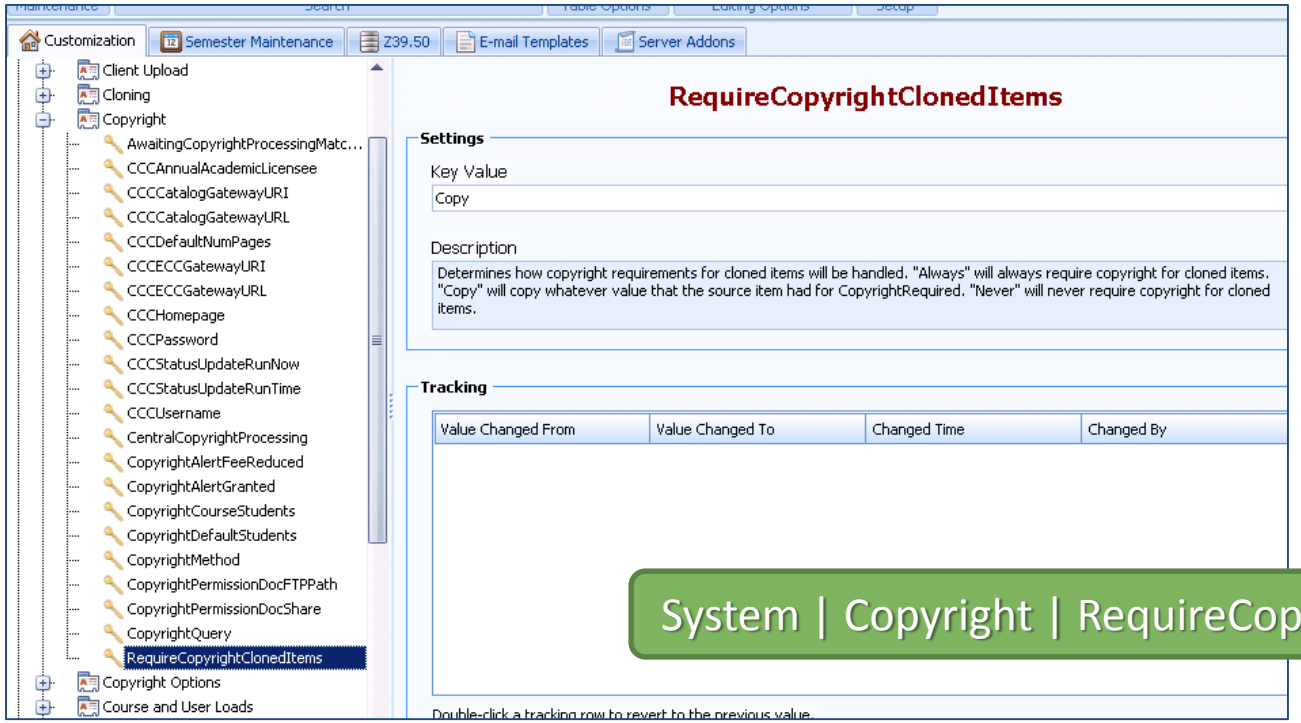


Reporting Options

- **SQL Server Reporting Services**
  - **Course Copyright Costs**
    - This report shows the total copyright fees incurred by each course. Only courses with associated fees will be shown. Fees are differentiated by provider (CCC and alternate copyright holders).

Cloning

- Customize the copyright required value on cloned requests
- Applies to both the client and the web Submissions



System | Copyright | RequireCopyrightClonedItems

Cloning Customization Key

- Copy (Default)
  - Default selection
  - Copies the value from the source item to new item record
- Always
  - Requires copyright for all cloned items
- Never
  - Never requires copyright for cloned items

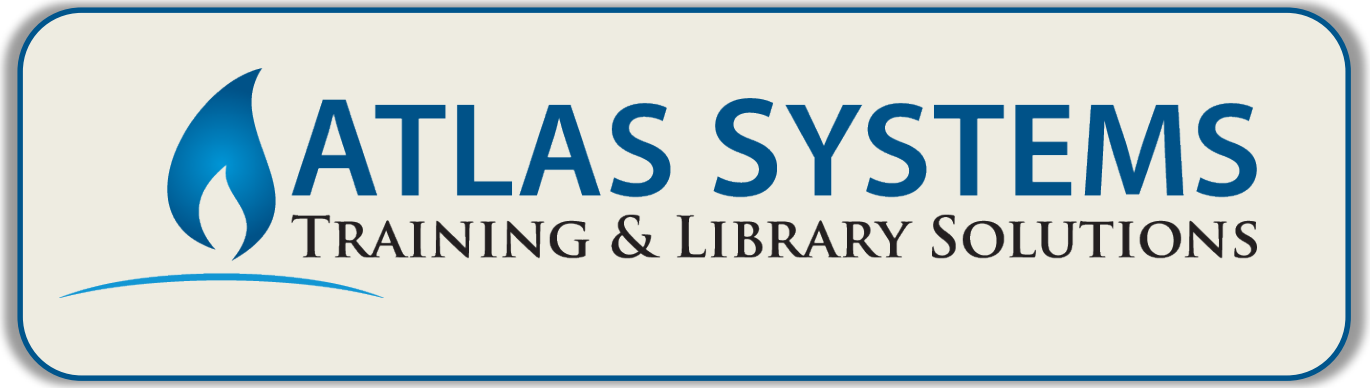
Ares Documentation

Processing

- Ares User Guide
  - Ares Client
    - Processing Items in the Ares Client
      - » Processing Copyright

Configuration

- Ares Configuration Guide
  - Configuring Workflow
    - Configuring Copyright



Thank You