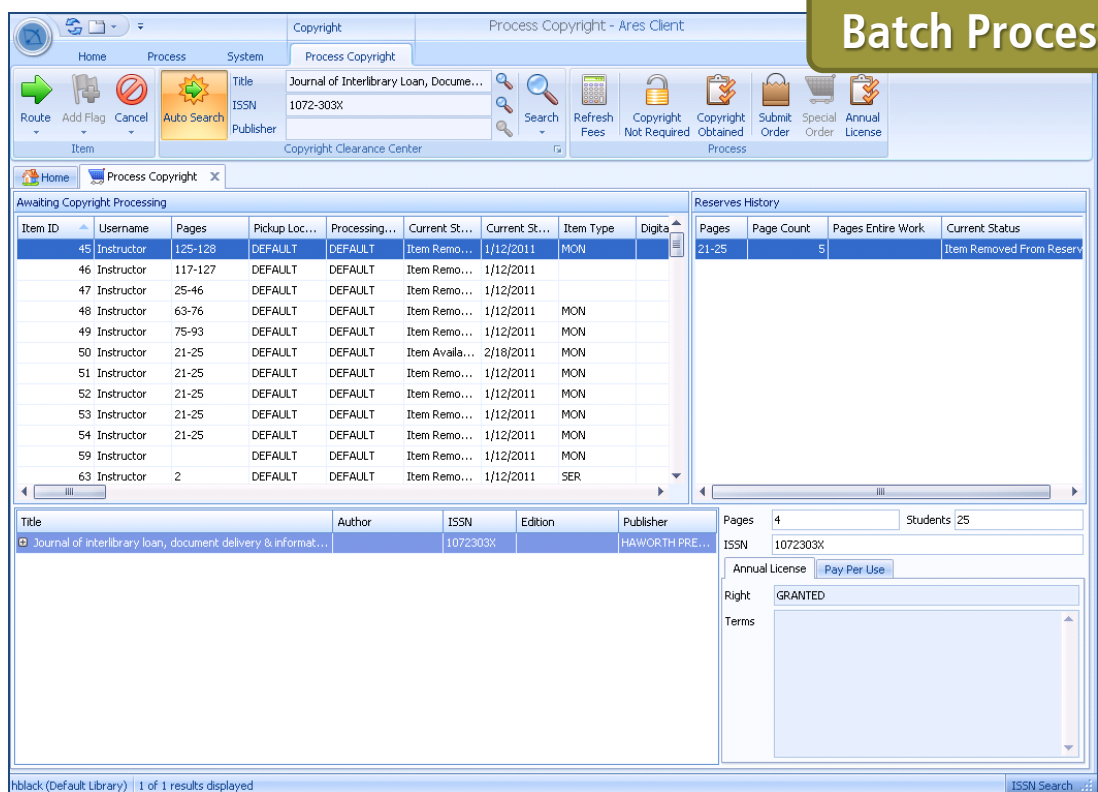


Ares Copyright Processing

Ares provides a set of tools to help you track copyright permissions for the items that you have on reserves. These tools can be adapted to your local policies and procedures.

Ares Copyright Basics

- Not to be confused with **Electronic Document Management**
 - Separate function which manages direct posting of electronic materials
 - Trusted Instructors
 - Trusted Document Types
 - “Awaiting Staff Review” queue
- **Awaiting Copyright Processing**
 - List of items with **Copyright Required** indicated in the request
 - Copyright required set on web form when item is submitted by instructor
 - This is a hidden field, does not display to user
 - Set by default on article and book chapter forms
 - Can customize web pages to add indication to other format types
 - Can customize query that creates queue based on local policy
 - “Virtual Queue”
 - Flagged for processing separately
 - Items can still move through other “real” Ares processing
 - Assistance with the “first of term flood”
 - Allows distribution of staff work
 - Student staff pull & scan
 - Library staff monitor approve/request/manage royalty issues
- Access via **System Group** on Home screen
 - Double-click the **Awaiting Copyright Processing** queue or
 - Open the **Process** ribbon on the Ares Client and choose **Process Copyright**
 - Batch Processing view will open



Batch Processing

Item ID	Username	Pages	Pickup Loc...	Processing...	Current St...	Current St...	Item Type	Digita
45	Instructor	125-128	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
46	Instructor	117-127	DEFAULT	DEFAULT	Item Remo...	1/12/2011		
47	Instructor	25-46	DEFAULT	DEFAULT	Item Remo...	1/12/2011		
48	Instructor	63-76	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
49	Instructor	75-93	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
50	Instructor	21-25	DEFAULT	DEFAULT	Item Availa...	2/18/2011	MON	
51	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
52	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
53	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
54	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
59	Instructor		DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
63	Instructor	2	DEFAULT	DEFAULT	Item Remo...	1/12/2011	SER	

Title	Author	ISSN	Edition	Publisher	Pages	Students
Journal of interlibrary loan, document delivery & informat...		1072303X		HAWORTH PRE...	4	25

ISSN 1072303X

Annual License Pay Per Use

Right: GRANTED

Terms:

- Can also process from the **Item Form**
- All functions from Batch processing available on each item form

The screenshot displays the Copyright Clearance Center (CCC) Item Form interface. The window title is "15 - Item". The interface includes a top navigation bar with "Home" and "Copyright Clearance Center" tabs. Below this is a search and action bar with fields for "Title" (Journal of Electronic Reserves), "ISSN", and "Publisher". Action buttons include "Refresh Fees", "Submit Order", "Special Order", "Annual License", and "Cancel Order". A green callout box labeled "Item Form" is positioned in the top right corner. The main content area features a table with the following data:

Title	Author	ISSN	Edition	Publisher
Journal of interlibrary loan, document delivery & info...		15403572		Haworth Press
Journal of interlibrary loan, document delivery & info...		1072303X		HAWORTH PR...

To the right of the table, there are input fields for "Pages" (6) and "Students" (30). Below these are fields for "ISSN" (15403572), "Annual License" (selected), and "Pay Per Use". Further down, there are fields for "Right" (GRANTED), "Price" (\$30.50), and "Terms". The bottom status bar indicates "Item Removed From Reserves" and "2 of 2 results displayed".

Ares Copyright Decision Making Tools

Reserves History Grid

- Assists you to determine the need for royalty payment based on your local policies
- Use to evaluate your previous use of the item
- Lists items with **matching ISXN** or **title** field that have previously been used by the **same course**
- Use layout customization features to move content into initial display
 - For item processing grid
 - Scroll to right to find column of data
 - Click and drag column header up until X appears
 - Scroll back to screen of initial display
 - Right click on header to open customization window
 - Select **Column Chooser**
 - Click and drag the column name into the desired location on display
 - Example below adds **Article Title** and **Page Number**
 - Results in **Reserves History** grid can be customized to include data from items to better match evaluation for your local policy
 - For information on changing information in display, see Ares documentation. From left hand menu, navigate to
 - Ares Configuration Guide
 - Configuring Workflow
 - Configuring Copyright
 - The Default Copyright Query
 - Example below includes **Article Title**

Customization Window

- Z↓ Sort Descending
- Clear Sorting
- Group By This Column
- Show Group By Box
- Remove This Column
- Column Chooser
- Best Fit
- Best Fit (all columns)
- Filter Editor...
- Show Find Panel
- Show Auto Filter Row
- Clear Columns
- Restore Default Layout
- Export...

Customized Column Display

Item ID	Username	Article Title	Pages	Pickup Loc...	Processing...	Current St...	Current
45	Instructor	Common Practices in Inte...	125-128	DEFAULT	DEFAULT	Item Remo...	1/12/20
46	Instructor	Bypassing E-Reserves wit...	117-127	DEFAULT	DEFAULT	Item Remo...	1/12/20
47	Instructor	Using Electronic Course R...	25-46	DEFAULT	DEFAULT	Item Remo...	1/12/20
48	Instructor	Managing Employees in I...	63-76	DEFAULT	DEFAULT	Item Remo...	1/12/20
49	Instructor	Distance Education Electr...	75-93	DEFAULT	DEFAULT	Item Remo...	1/12/20
50	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Availa...	2/18/20
51	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/20
52	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/20
53	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/20
54	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/20
59	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/20
63	Instructor	Ares-Automating Reserv...	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/20

Pages	Article Title	Page ...	Pages E...	Current Status
141-15	Shifting Responsibility F...	12	0	Item Removed
63-76	Managing Employees in ...	14	0	Item Removed
75-93	Distance Education Elec...	19	0	Item Removed

Customized
Reserves History

Copyright Clearance Center (CCC) Gateway Search

- Determine rights availability and pricing at the Copyright Clearance Center
- No direct invoicing from CCC required for searching
- **Auto-Search** is active by default (button is highlighted yellow)
 - Searches CCC for title highlighted in **Awaiting Copyright Processing** grid
 - Search results display in lower portion of screen
 - Left-hand grid = Title Results
 - Right-hand grid = CCC Right Availability & Pricing
- CCC Gateway search also available on the **Item Form**

The screenshot shows the 'Process Copyright' application window. The 'Auto Search' button is highlighted in yellow. An arrow points from the button to the 'Awaiting Copyright Processing' grid. Below the grid are two blue callout boxes: 'Title Results' on the left and 'CCC Rights Availability & Pricing' on the right.

Item ID	Username	Title	Course ID	Pickup Loc...	Processing...	Current St...	Current...
15	sspires	Journal of Electronic Reserves					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 Operations	3	DEFAULT	DEFAULT	Item Availa...	10/2
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		DEFAULT	DEFAULT	Item Availa...	10/2

Title	Author	ISSN	Edition	Publisher	Pages	Students
Journal of interlibrary loan, document delivery & information s...		15403572		Haworth Press	6	30
Journal of interlibrary loan, document delivery & information s...		1072303X		HAWORTH PRESS,	Annual License	Pay Per Use

Right: GRANTED

Terms

Alternate Rightsholder Records

- Determine availability and pricing of right from sources outside the CCC
 - Purchase direct from publisher or other copyright owner
- Requires establishment of Rightsholder records by your site
 - From **System** ribbon, select **Rightsholders Maintenance**
 - Create a record for each provider with contact information (email is especially helpful) and titles covered by that rightsholder
 - Rightsholder record also includes links to any previous or outstanding rights requests from that rightsholder

Rightsholder Record

ID	Rightsholder Name	Address1	Address2	Address3	City	State	Postal Code	Country	Contact N...	Phone	Fax	E-Mail	Comm
1	Workman Publish...	5983 W. Co...			Mount Plea...	NJ	04562	USA	Daria Ligher	456/987-7878		ligherD@wo...	
2	Insignia Resources	6587 S. Elm...	Suite 322		Oklahoma City	OK	65874		Drew Dawson			dd@IR.org	Curricu...

Contact Info

Title Coverage

Rights Requests

- Once Rightsholder Records have been created, they are available for searching within the **Item Form**.

Copyright 15 - Item

Copyright Clearance Center

Rightsholder Search Grid

Rightshold...	Rightshold...	Address1	Address2	Address3	City	State	Postal Code	Country	Contact N...	Phone	Fax	E-Mail
1	Workman P...	5983 W. Co...			Mount Plea...	NJ	04562	USA	Daria Ligher	456/987-7878		ligherD@w...

Item Information

Journal Title: Journal of Electronic Reserves

Volume/Issue: [] []

Month/Year/Pages: [] 2011 [] 25-30

Article Title: Using Ares for Reserves

Article Author: Calsada, Matt

Terms and Fees

Status: []

Order Date: []

Order Reference: []

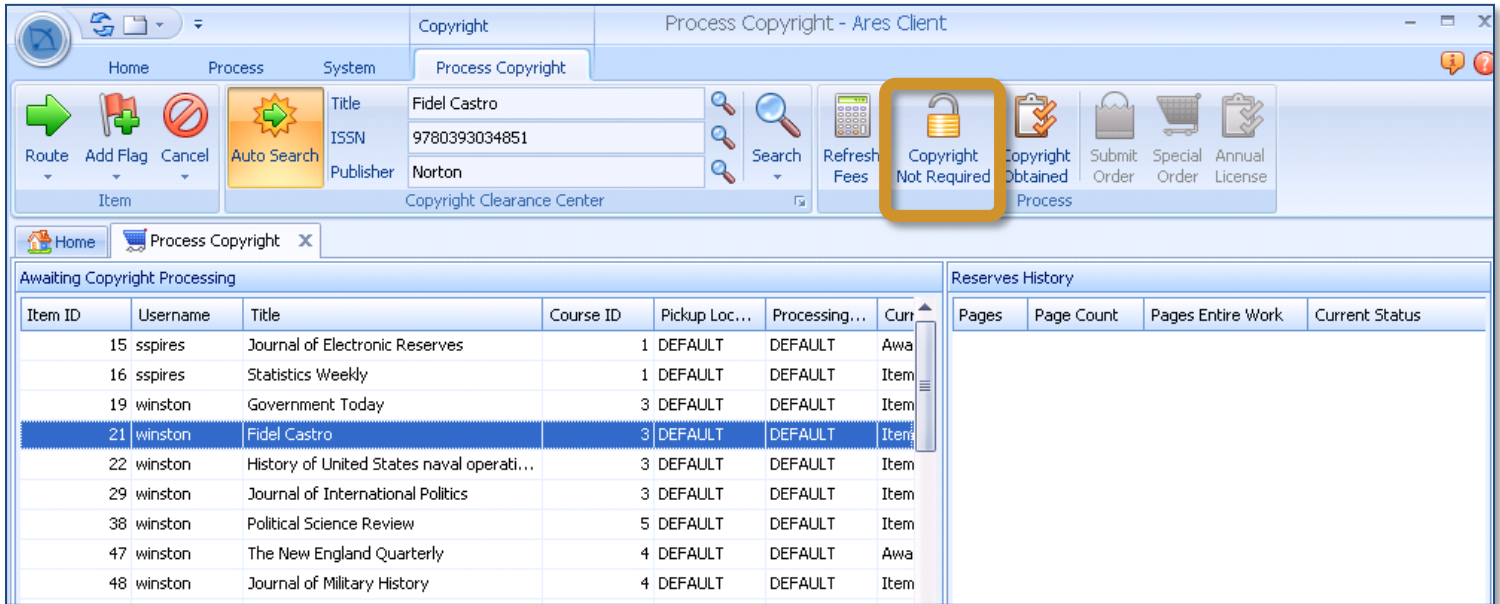
Fee: []

Terms/Notes: []

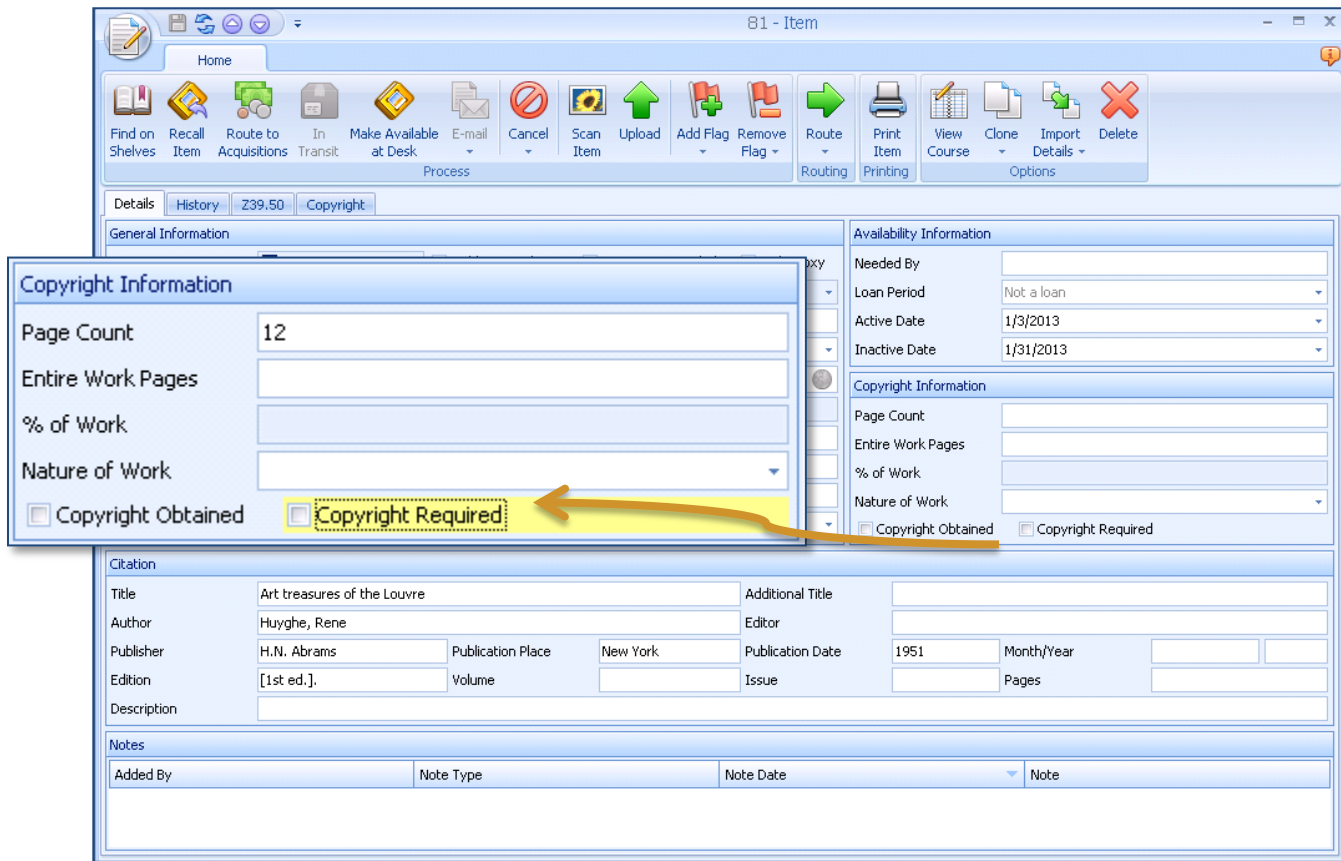
Ares Copyright Processing Tools

Basic Processing

- **Copyright Not Required**
- Use with items that do not require royalty processing
- Use the **Copyright Not Required** button from the **Process Copyright** ribbon for items that you determine do not present a copyright issue



- **Removes the check from the Copyright Required box on the Item Form.**



- **Copyright Obtained**

- Use with items where copyright permissions have been obtained previously
- Use the **Copyright Not Obtained** button from the **Process Copyright** ribbon

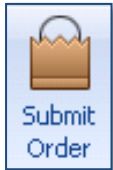
The screenshot shows the 'Process Copyright' window in Ares Client. The ribbon includes buttons for 'Route', 'Add Flag', 'Cancel', 'Auto Search', 'Refresh Fees', 'Copyright Not Required', 'Copyright Obtained', 'Submit Order', 'Special Order', and 'Annual License'. The 'Copyright Obtained' button is highlighted with an orange box. Below the ribbon, there is a table titled 'Awaiting Copyright Processing' with columns: Item ID, Username, Title, Course ID, Pickup Loc..., Processing..., and Current Status. The row for 'Fidel Castro' (Item ID 21) is selected. To the right is a 'Reserves History' table with columns: Pages, Page Count, Pages Entire Work, and Current Status.

- Adds the check from the **Copyright Obtained** box on the **Item Form**.

The screenshot shows the 'Item Form' for '81 - Item'. The 'Copyright Information' section is highlighted with a blue box. It contains fields for 'Page Count', 'Entire Work Pages', '% of Work', and 'Nature of Work'. Below these fields are two checkboxes: 'Copyright Obtained' (checked) and 'Copyright Required' (unchecked). An orange arrow points from the 'Copyright Obtained' checkbox in the highlighted section to the 'Copyright Obtained' checkbox in the main form's 'Copyright Information' section. The main form also shows 'Availability Information' and 'Copyright Information' sections with various fields for loan and work details.

Copyright Clearance Center (CCC) Processing

- Use CCC processing options to submit orders to the CCC for reserves use
- CCC account required and configured in Ares Customization Manager
- Rights and processing options available from CCC
- Options available on the **Process Copyright** ribbon in the Ares Client or from the **Copyright Tab** on the **Item Form**
 - **Granted—Pay Per Use**
 - CCC has been given permission to grant permission for reserves use
 - Fees display on **Pay Per Use** tab
 - Calculated based on the number of students listed in **Students** field
 - Use the **Submit Order** button in the Copyright Processing Ribbon to order invoice for that reserve use
 - Order is sent to CCC
 - Item is updated to **Copyright Obtained** and removed from **Awaiting Copyright Processing** Virtual Queue
 - Ares sends updates daily to update any change in enrollment
 - Change in fees will flag items to a virtual queue in Ares Client
 - CCC invoices 60 days after the "start of term" date provided in course information
 - Monitor or cancel order from the **Item Form | Copyright Tab | Copyright Clearance Center Sub-Tab**



CCC invoices 60 days after the "start of term" date provided in course information

Item Form

Copyright Clearance Center

44 - Item

Home Copyright Clearance Center

Title: Journal of Interlibrary Loan, Docume...
 ISSN: 1072303X
 Publisher: [Empty]

Copyright Clearance Center

Refresh Fees Submit Order Special Order Annual License Cancel Order

Process

Details History Z39.50 Copyright

Copyright Clearance Center

Title	Author	ISSN	Edition	Publisher

Pages: 12 Students: 25

ISSN: [Empty]

Annual License Pay Per Use

Right: [Empty]

Terms: [Empty]

Details

Order Header Annual License Order Detail

Right: Covered by License

Fee: \$0.00

Terms: -- FOR DEMONSTRATION AND TESTING ONLY -- This application is currently directed at the Copyright Clearance Center's testing and demonstration server. No rights are actually being granted or orders generated by this software. --

Status

Invoiced Cancelled

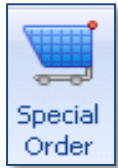
Monitor CCC Order

Granted—Annual License



- Item is included in the CCC Academic Annual License service
- Use the **Annual License** button to mark item as part of Annual License, if your institution participates in that service
 - Item is updated to **Copyright Obtained** and removed from **Awaiting Copyright Processing** Virtual Queue

- **Special Order**



- CCC cannot readily grant permission for reserves use but may be able to negotiate the use on your behalf
- Use the **Special Order** button to submit special order request to the CCC
 - Ares checks daily for any update on status of special order
 - CCC change in status on Special Order request—Granted or Denied—flags item with new virtual status

- **Denied**

- CCC cannot grant permission for reserves use
- Indicated on Annual License and Pay Per Use options

- **CCC Fee Calculation**

- Based on number of enrolled students in course
- Enrollment based on option selected by your site
 - **Enrolled Students**
 - Enrollment field on the **Add a Class** page or default listed in Customization Manager key
 - **Ares Students**
 - Students linked to the course through Ares

Alternate Rightsholder Processing

- Provides tracking service for obtaining permissions from sources outside of CCC
 - Function to send email directly from Ares Item
 - Ability to track permissions granted or denied
- Must create **Rightsholder Records** prior to processing on **Item Form** (see above)
- From **Item Form**, select the **Copyright Tab** and **Rightsholder Subtab**
 - Click on a rightsholder from the list in the center portion of the screen
 - Choose the **Select** button from the **Rightsholder Ribbon**
 - Once a Rightsholder has been selected, several options are available from the **Copyright Tab** on the

- **Email Request**



- Choose this option to create email request for reserves permissions
- Opens email template with email address from Rightsholder record
 - Adds **Pending** to **Status** field in **Terms and Fees** box
 - Adds **Order Date** to **Terms and Fees** box
- Once a response is received, you may select
 - **Granted** which adds **Copyright Obtained** indicator to the Item
 - **Denied** which adds denied to **Status** field in **Terms and Fees** box





- **Upload** allows you to save an electronic document which permission approval to the item record
- **Remove Copyright** removes **Terms and Fees** information from **Rightsholder** sub-tab
 - Saves information removed from Item to **Copyright History** sub-tab

Select Rightsholder

Click to Select

Click to Choose

Rightshold...	Rightshold...	Address1	Address2	Address3	City	Country	Contact N...	Phone	Fax	E-Mail
2	Insignia Re...	6587 S. Elm...	Suite 322		Oklah...		Drew Dawson			dd@IR.org
1	Workman P...	5983 W. Co...			Mount Pl...		Daria Ligher	456/987-7878		ligherD@w...

Process Alternate Rightsholder

Processing Options

Order Status

Rightsholder Information

Rightsholder Name	Insignia Resources	Address	6587 S. Elm St.		
Contact Name	Drew Dawson		Suite 322		
E-mail	dd@IR.org				
URL		City	Oklahoma City	State	OK
Type	Other	Country		Zip	65874
Request Method	E-mail	Payment Preference	Credit Card	Phone	
Comments					

Item Information

Journal Title	Music Education Design	Status	Pending
Volume/Issue	45 2	Order Date	11/6/2012
Month/Year/Pages	5 37-42	Order Reference	
Article Title	Percussion Instruments in the Elementary Class	Fee	
Article Author	R.Drummond	Terms/Notes	

Miscellany

- **Individual Item Fair Use Tracking**

- Amount of work used
- **On Item Form**
 - **Copyright Information** Group
 - Enter Page Count for number of pages used on reserve
 - Entire total number of pages of item
 - Percentage is calculated in **% of Work** field
 - This value is created on the fly in Ares and cannot be exported separately
 - **Nature of Work**
 - Indicate the genre type
 - Drop down menu can be created/customized in the Customization Manger
 - System | General | Custom Dropdowns

The screenshot displays the 'Item Form' interface for item ID 83. The interface is divided into several sections:

- Process Bar:** Contains icons for Find on Shelves, Recall Item, Route to Acquisitions, In Transit, Make Available at Desk, E-mail, Cancel, Scan Item, Upload, Add Flag, Remove Flag, Route, Print Item, View Course, Clone, Import Details, and Delete.
- Details:** Includes tabs for History, Z39.50, and Copyright.
- General Information:** Fields include Item ID (83), Processing Location (Main Library), Pickup Location (Main Library), Item Type (Monograph), Call Number, Shelf Location, ISxN (0021-1753), Cited In (firstsearch.oclc.org:Article), Reference Number, and Instructor Tags. It also has checkboxes for Visible to Students, Instructor Provided, and Web Proxy.
- Availability Information:** Fields include Needed By, Loan Period (Not a loan), Active Date (1/3/2013), and Inactive Date (1/31/2013).
- Copyright Information:** Fields include Page Count (12), Entire Work Pages (764), % of Work (1%), and Nature of Work (dropdown menu). It also has checkboxes for Copyright Obtained and Copyright Required.
- Citation:** Fields include Title (Isis.), Author (Dupré), Publisher, Edition, Volume (101), Issue (3), and Pages (618-629). It also includes fields for Additional Title, Editor, Publication Place, Publication Date (Month/Year 2010), and Description.
- Notes:** A table with columns for Added By, Note Type, Note Date, and Note.

Annotations on the screenshot include an orange arrow pointing to the 'Item Form' title bar and a blue callout box with the text 'Add Fair Use Information' pointing to the Copyright Information section.

- **SQL Server Reporting Services**

- Default reporting service has report available for all Ares customers
- **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).
- Custom reports can be created

- **CCC Annual License Report**

- Track usage of materials that are part of Academic Copyright License Service
- From **Process** ribbon, select **ACL Survey**
 - Enter Start Date and End Date
 - Excel spreadsheet with appropriate data

Creates Excel Spreadsheet to Save

Item ID	Username	Title	Course ID	Default	Current Status
53	winst				
55	jflann				
56	jflann				
57	jflann				
58	jflannigan	Isis.	7	DEFAULT	DEFAULT
60	jflannigan	Archeologia	7	DEFAULT	DEFAULT
61	jflannigan	Art journal	7	DEFAULT	DEFAULT
62	jflannigan	Third Text	7	DEFAULT	DEFAULT
63	jflannigan	Russian History	7	DEFAULT	DEFAULT
67	jflannigan	Ireland and Scotland Journal	6	DEFAULT	DEFAULT
78	jflannigan	American Indian art magazine.	9	DEFAULT	DEFAULT
79	jflannigan	Archeologia	9	DEFAULT	DEFAULT

Title	Author	ISSN	Edition	Publisher	Pages	Students
Weekly statistical bulletin	American Petrole...	19464592		AM PETROLEU...	9	30
Statistisk ukehefte	Statistisk sentralbyr	05500567		Statistisk sentr...	19464592	
AMERICAN PETROLEUM INSTITUTE. DIVISION OF ST...		00030457		AM PETROLEU...		
Inside the Bank of Canada's weekly financial statistics ...	MARTIN, PETER	97808897...	2nd ed.	FRASER INSTI...		
Weekly railroad traffic : revenue freight traffic statisti...	ASSOCIATION O...	10487662		ASSOCIATION...		
Inside the Bank of Canada's Weekly financial statistics...	MARTIN, PETER	97808897...		FRASER INSTI...		

Pages: 9, Students: 30
ISSN: 19464592
Annual License | Pay Per Use
Right: Special Order
Price: [Empty field]
Terms: Fees cannot be calculated. The work can be requested as a special order.