OCLC ILLiad Copyright Processing

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Participation is Welcome

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Introductions

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By the end of this class you will be able to:

- Process items through ILLiad copyright
  – Save copyright fee information as needed
- Find and edit the copyright query
- Run the Copyright web report
- Submit copyright order via the CCC Gateway
- Troubleshoot common copyright problems

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Agenda

- ILLiad copyright processing overview
- Process copyright screen
- Customization Manager copyright keys
- Running the copyright web report
- Submitting the copyright order to Copyright Clearance Center
- Changing copyright information later in the processing workflow

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ILLiad copyright processing overview

- Everyday activity
- All article requests start at Awaiting Copyright Clearance
- Items processed out of this screen according to your institution's policies/procedures to comply with copyright guidelines
- Requests completed or cancelled
- Submit copyright order

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ILLiad copyright processing screen

- Transactions to be cleared in Process Copyright Form
  - Includes all new article requests that are not marked as Copyright Already Paid
  - Organized by transaction number
    - Can sort

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ILLiad copyright processing screen

- 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

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ILLiad copyright processing screen

- Demo:
  - Open Copyright Processing form
    - Tour
      - Transactions to be cleared
      - Copyright list
      - Copyright lookup & payment box
      - Web link to CCC

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ILLiad copyright processing screen

- Demo:
  - Select multiple records with ctrl key
  - Ctrl-click to deselect a TN
  - Shift key to select a range
  - Open General Update form
  - Sort by Journal title
  - Select All
  - Deselect All
  - Auto select No Problem
  - No Problem manual

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- Auto Select No Problem Note:
  - Because of inconsistencies in the way customers may enter dates, it is usually a good idea to review the system's selections to make sure that no items are selected that should incur copyright royalty payments.

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- All No Problem Requests Cleared?
  - 3 options left
    - Record copyright fees
    - Route to Doc Provider
    - Cancel the request

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- Demo:
  - Cancel Request
  - Doc Provider

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- Demo:
  - Payment Required

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- Demo:
  - Payment Required
    - Auto Lookup on CCC
      - Note: The client first searches the CCC database by ISSN. If no ISSN value exists for the transaction, it will then search by journal title.
      - When searching by journal title, it will not match abbreviated titles to the complete title. Complete titles should be entered into the search window manually before performing the CCC search.

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- Demo:
  - Payment Required
    - Manual Search

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- Demo:
  - Payment Required
    - Multiple Search
      - Choose appropriate entry
      - Data Errors
      - CCCDefaultNumPages
        » System unable to calculate number of pages

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ILLiad copyright processing screen

- Not all records in the Copyright Clearance Center database will allow you to acquire royalty payment information in this way. You may encounter journal title records for which this kind of use is denied. You may also encounter titles for which permission must be obtained directly from the publisher or author(s). In such cases, the *Right* field in the Copyright Search results section of the form will typically indicate the CCC status of each title.
- As it is not possible to acquire permission for these titles automatically via the Copyright Clearance Center, the Save Copyright Payment Information button will be grayed out for these titles. Special cases like this will need to be handled outside of the normal copyright process. If you wish, you may add a note to these records and route them to the next appropriate status.

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ILLiad copyright processing screen

- Clicking the Save Copyright Payment Information button does not actually make any payments or send any payment information to anyone.
- It simply attaches the information to the selected transaction record so that, **IF it is delivered successfully**, it will show up on a copyright report as requiring payment.

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ILLiad copyright processing

- Customization Manager keys
  - CCC keys
  - CopyrightWarning
    - Yes/No Allows you to turn off the Copyright CCL/CCG warning that comes up when searching requests.
  - CopyrightYears
    - Any integer value. Used by the Auto Select No Problem Requests button on the Copyright Processing form to determine what should be cleared through copyright.

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ILLiad copyright processing

- CopyrightComp field
  - The client assigns a US:CCG or US:CCL value based on the date of the requested item. If it has a RequestType of Article, then it looks at the PhotoJournalYear and if that year is less that 5 years prior, it puts CCG in there. Otherwise it puts CCL. If the value in PhotoJournalYear cannot be converted to a number, then it puts CCL in there.

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- Copyright Already Paid
  - If the lending library is marked as a Copyright Payer in the address form, then when you receive a request from them, the transaction is marked as Copyright Already Paid. You can also manually edit records to mark it as such.
  - Those requests are filtered out of any copyright reports or queries that count towards your 5 per year.

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Editing ILLiad copyright payment information

- Attaching copyright payment information later
  - From the General Update form
  - Go to the Show menu and select Copyright Gateway Search.
  - Select the desired CCC record (if there are multiples) and click the Save Copyright Payment Information button. This will save the payment information (including the required information that isn't visible on the General Update form) to the transaction record.
  - Close the copyright form and the General Update form.

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Editing ILLiad copyright payment information

- Viewing Details of order on a particular transaction
  - Go to the General Update form
  - Show menu | Copyright Order Status

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Editing ILLiad copyright payment information

- Canceling copyright order on a particular transaction
  - Go to the General Update form
  - Show menu | Copyright Order Status
  - Click Cancel Order button
    - If CCC has already invoiced, you cannot cancel.

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Editing ILLiad copyright payment information

- Staff can choose to remove the copyright information using the Process Menu. This is to correct items that were marked for copyright payment by mistake without marking them as copyright already paid.

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ILLiad copyright order

- Scheduling Copyright Payment Orders
  - Your choice
  - Once or twice yearly is common
    - *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.*

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ILLiad copyright order

- Access the Copyright Order form in the client
  - *Maintenance | Copyright Gateway Interface*

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Copyright Report/Order Screen

- 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

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ILLiad copyright order

- 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 of 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.

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- 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. When an item was actually requested from the Lending institution is not relevant to pricing.
  - No order submitted yet

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- 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

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Copyright Clearance Center to Move to New Login Convention on Copyright.com
February 16, 2006

In early April Copyright Clearance Center will change the login convention on copyright.com from username and password to e-mail address and password.

The change is part of a broader internal systems upgrade. The new system will help improve security while establishing a consistent login method for you, our customer. The system upgrade is currently scheduled to begin the evening of Thursday, March 30th and end the morning of Tuesday, April 4th.

While every effort has been made to minimize the impact of this change on our customers, during the system upgrade:

- Copyright.com will be down for the majority of the business day on Monday, April 3rd.
- Manage Account and all related functionality will be unavailable throughout the system upgrade.
- Other areas of copyright.com may be temporarily unavailable during the upgrade period.

Following the change over, you will use your account e-mail address and password to log in to copyright.com.

No action on your part is required at this time. However, we do recommend that you verify your account e-mail address prior to March 30th. To verify your e-mail address or change your account information, go to www.copyright.com/myaccount.

If you have any questions, please contact a Customer Relations Representative by phone at (978) 646-2600, or by e-mail at info@copyright.com.

ILLiad copyright 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 clear through

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ILLiad copyright order

- Unusual Copyright processing
  - 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'

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ILLiad copyright processing

- Copyright web report
  - Maintenance | Web Reports
    - Administrative Reports

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Copyright Troubleshooting

- Common support questions
  - Why does this item show on my copyright report? I haven't requested from this journal 5+ times this calendar year?
  - How do I add copyright information after I've cleared it mistakenly?

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Resources

- Copyright Clearance Center
  - http://www.copyright.com/academic

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Resources

- Documentation and Knowledge Base
  - http://www.atlas-sys.com/documentation/illiad/
- Newsletter
  - http://www.atlas-sys.com/products/illiad/newsletter/
- OCLC Product Pages
  - http://www.oclc.org/illiad , http://www.oclc.org/ill/default.htm
- Listserv
  - http://listserv.vt.edu/archives/illiad-l.html
- Community
  - http://www.atlas-sys.com/community/
- support@oclc.org

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