



BECOME AN EXPERT

Leganto

ExLibris
Part of Clarivate

Digitization and Copyright

Kevin Lane-Cummings, Senior Customer Education Trainer
Jessie Ransom, Senior Manager, Product Management

Become an Expert:

Leganto

Session	Topic	Date
1	Streamlining Your Library's Leganto Workflows	May 22
2	Bulk Rollover in Leganto	May 29
3	Digitization and Copyright	June 5
4	Optimizing the New Leganto User Interface	June 12
5	Getting the Most out of Leganto Analytics	June 19
6	Increasing Adoption and Engagement with your Leganto Service	June 26

Agenda

- Questions to Consider First
- Copyright Considerations
- Digitization and Copyright Workflows and Tracking
- Additional Copyright Options
- Alternate Copyright Workflows
- Additional Resources

What we won't cover ...

- Integrations with regional copyright agencies
- What your institution must to do to manage copyright



Agenda

- **Questions to Consider First**
- Copyright Considerations
- Digitization and Copyright Workflows and Tracking
- Additional Copyright Options
- Alternate Copyright Workflows
- Additional Resources

Questions to Consider First

- What do you want to do or need to do related to copyright?
- Which steps do you want to automate, and which do you want to do manually?
- Do you want instructors to be able to request copyright review?
- Do you want instructors to be able to request digitization?



Agenda

- Questions to Consider First
- **Copyright Considerations**
 - **Determine which citations require copyright review**
 - Track fair-use or fair-dealing decisions made by instructors
- Digitization and Copyright Workflows and Tracking
- Additional Copyright Options
- Alternate Copyright Workflows
- Additional Resources

Determine Which Citations Require Copyright Approval

- Configure the default copyright status for reading list citations
- Set separately for repository (digital, electronic, or physical), CDI, non-repository, and brief citations.

Configuration > Fulfillment >
Copyright Management >
Citation Default Copyright
Status

	Enabled	Attribute	Attribute Type
1	☒	brief	Not Determined
2	☒	CDI_citation	Approved
3	☒	digital_repository	Not Determined
4	☒	electronic_repository	Approved
5	☒	non_repository_citation	Required
6	☒	physical_repository	Not Required

Workflow Implications

- Maps to the “Copyright Status” field for each citation
- Use this to flag citations that require copyright approval, or indicate those that don’t
- Citations can be filtered based on the Copyright Status field

3 ☐ **Behavioral economics**
Article By Colin F Camerer (Cell Press 2014/09/22)
Current Biology
ISSN: 0960-9822

Request Status: Complete
~~**Resource Locate Status:** Resource Located~~
Copyright Status: Not Required

Physical Electronic Digital ● Other(1) Citation Details

Agenda

- Questions to Consider First
- **Copyright Considerations**
 - Determine which citations require copyright review
 - **Track fair-use or fair-dealing decisions made by instructors**
- Digitization and Copyright Workflows and Tracking
- Additional Copyright Options
- Alternate Copyright Workflows
- Additional Resources

Track Fair-Use and Fair-Dealing Decisions Made by Instructors

- Instructors make copyright declaration when they upload a file
- Configure copyright options for instructors
- Instructor-facing text is fully customizable by the institution

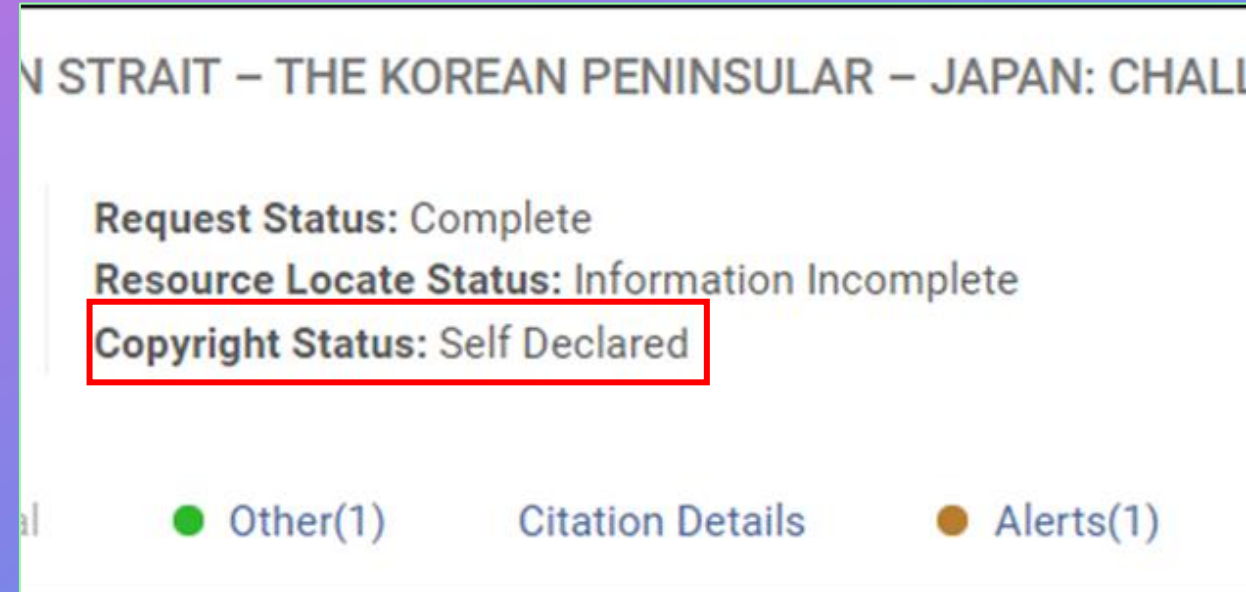
Configuration > Leganto >
List Management >
File Upload Copyright Options

Copyright information *

- ☐ Use of this resource complies with our institution's [Fair Use Policy](#)
- ☐ I would like the library to review this resource for copyright compliance

Workflow Implications

- Alma tracks that the instructor said use is OK
- Optional: Citations can be marked as complete automatically if Self Declared or Fair Use

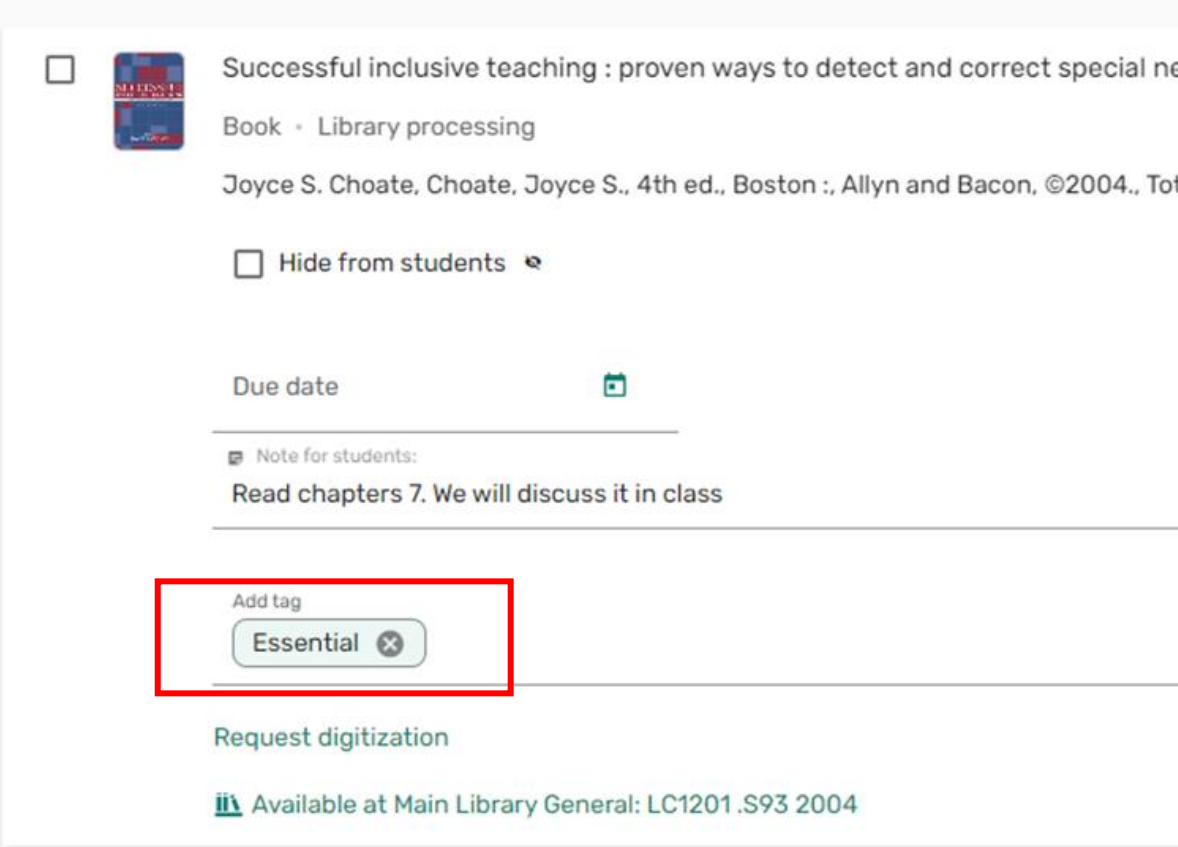


Agenda

- Questions to Consider First
- Copyright Considerations
- **Digitization and Copyright Workflows and Tracking**
 - **Understand Which Resources Need Digitization**
 - Understand Which Resources Require Copyright Approval
 - Leverage Digitization and Copyright Rules
 - Process and Track Copyright Approvals
 - Process Digitization Requests

Instructor Requests Digitization

- Instructor submits course-related digitization request in Leganto
- Copyright approval may be required, depending on digitization and copyright approval rules
- Instructor and the library can view the copyright approval status



☐  Successful inclusive teaching : proven ways to detect and correct special ne
Book · Library processing
Joyce S. Choate, Choate, Joyce S., 4th ed., Boston :, Allyn and Bacon, ©2004., Tot

☐ Hide from students 🔒

Due date 

Note for students:
Read chapters 7. We will discuss it in class

Add tag
Essential ✕

[Request digitization](#)

 Available at Main Library General: LC1201 .S93 2004

Library Staff Requests Digitization

- Library staff submits course-related digitization request in Alma

From Citation: Manage Fulfillment
Options > Place Request >
Request Type: Library Physical
Digitization Request

- Copyright approval may be required, depending on digitization and copyright approval rules

- Instructor and the library staff can view the copyright approval status

Digitization and Copyright Requests on Task Lists

- Other Requests – Digitization Requests - approval
- Citations–copyright waiting for approval

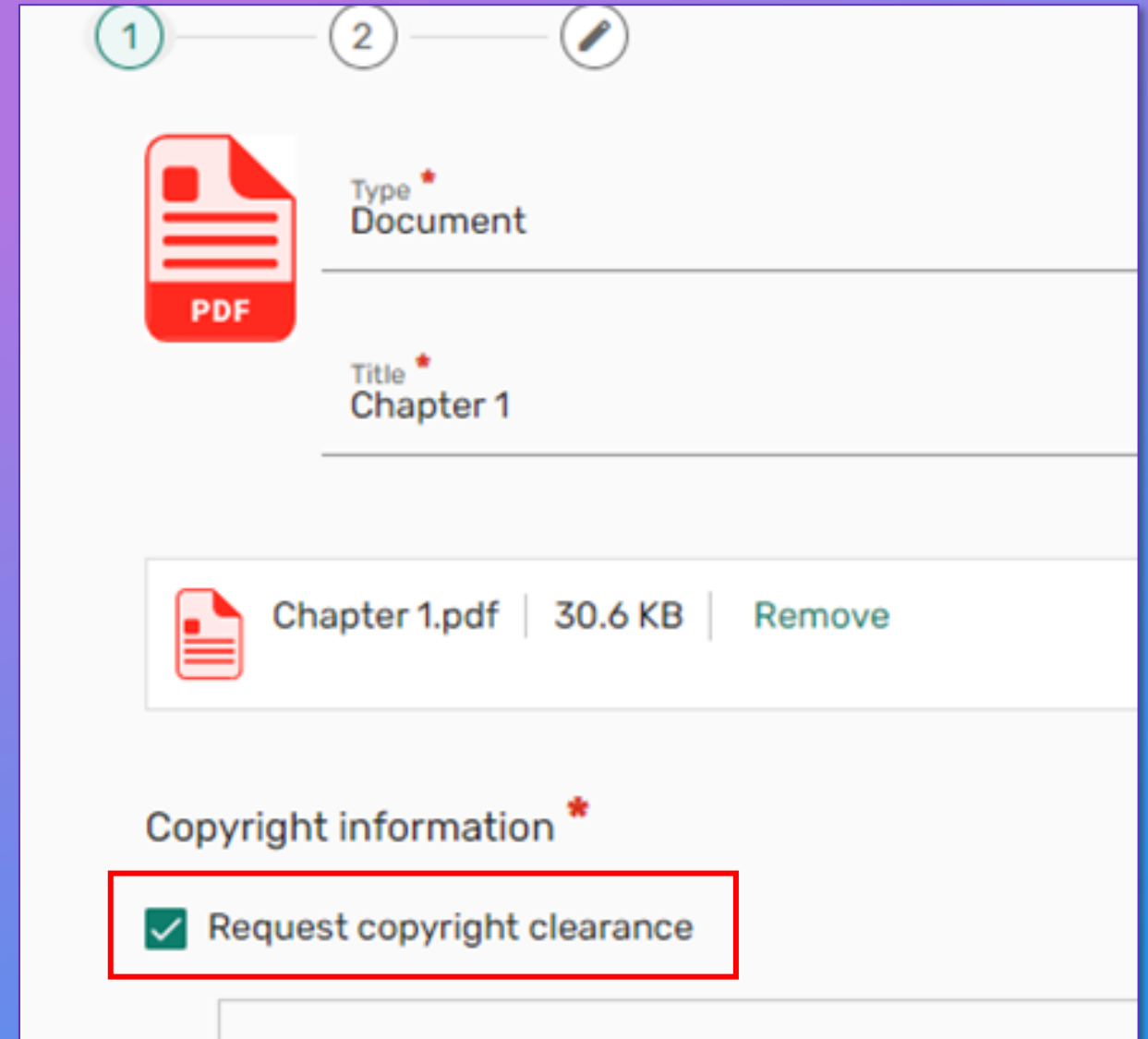
Tasks	
116	Purchase Requests >
9	Other Requests v
9	Digitization requests - approval
46	DARA Recommendations >
2318	Order Lines >
2	Items >
354	Reading Lists >
3467	Citations v
101	Citation has a New File
2513	Being prepared
21	Copyright waiting for approval
26	In Process
9	Marked as broken
788	Ready for processing
9	Unassigned - have new notes
44	Rialto >

Agenda

- Questions to Consider First
- Copyright Considerations
- **Digitization and Copyright Workflows and Tracking**
 - Understand Which Resources Need Digitization
 - **Understand Which Resources Require Copyright Approval**
 - Leverage Digitization and Copyright Rules
 - Process and Track Copyright Approvals
 - Process Digitization Requests

Instructor Asks for Copyright Clearance

- Possible to have copyright clearance not related to digitization (already have file)
- Can be done as standalone, or in addition to the fair use/fair dealing declaration
- Triggered when they select an option requiring copyright clearance



The screenshot shows a digital submission form with a progress bar at the top containing three steps: 1 (highlighted in green), 2, and a pencil icon. The form fields include:

- Type**: Document
- Title**: Chapter 1
- File Upload**: A red document icon with 'PDF' text, followed by 'Chapter 1.pdf | 30.6 KB | Remove'.
- Copyright information**: A section with a red asterisk, containing a checkbox labeled 'Request copyright clearance' which is checked and highlighted with a red border.

Alma Tracks Copyright Clearance Request

- Checks against rules to approve or not
- Library sees status on citation in Alma
- Instructor sees status in Leganto
- Added to task lists:
 - Citations—copyright waiting for approval
 - Requests—Digitization Requests - approval



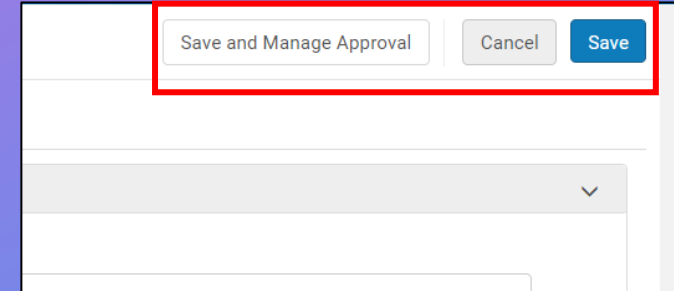
Request Status: Being Prepared

Resource Locate Status: Information Incomplete

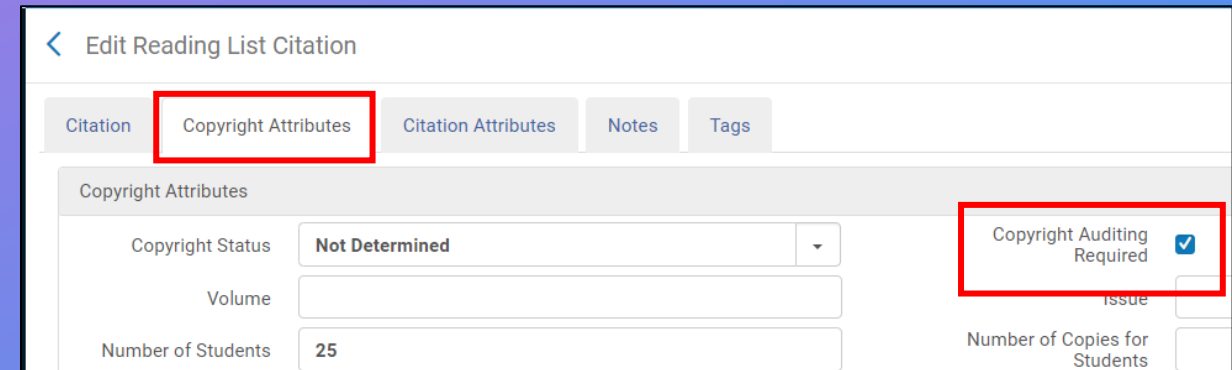
Copyright Status: Waiting for Approval / Exceed Copyright Work Percentage

Library Indicates Copyright Clearance Required

- Edit Citation – view copyright attributes tab
- Check box: Copyright Auditing Required
- Save (to go back to citation and have someone else approve), or Save and Manage Approval (to navigate approval workflow)



Save and Manage Approval Cancel Save



← Edit Reading List Citation

Citation Copyright Attributes Citation Attributes Notes Tags

Copyright Attributes

Copyright Status Not Determined

Volume

Number of Students 25

Copyright Auditing Required ☒

Number of Copies for Students

Agenda

- Questions to Consider First
- Copyright Considerations
- **Digitization and Copyright Workflows and Tracking**
 - Understand Which Resources Need Digitization
 - Understand Which Resources Require Copyright Approval
 - **Leverage Digitization and Copyright Rules**
 - Process and Track Copyright Approvals
 - Process Digitization Requests

Digitization and Copyright Rules - Overview

- Automate (to some extent) the process of evaluating whether use of a resource complies with fair use/fair dealing
- Build rules to flag items that can be approved automatically
 - Example: Less than 10% of the work
 - Example: First article from this Journal/issue for this course
- Rules will be used for copyright approval workflows (related to digitization and not)
- Alma will check against these rules in order until it finds one that applies to the situation. If none, default rule will apply.

Request Triggers a Digitization and Copyright Rule

Alma Production

Acquisitions

Resources

Leganto

Fulfillment

User Management

General

Analytics

Digitization Workflow Rules List

Institution Rules List

 Filter : All

 Request Type Parameter : All

	Enabled	Move Up	Move Down	Rule Name	Description
1	☐			DCS block - Publishers with special license	DCS block - Publishers with special license
2	☐			Block request when CLA Check Permission is false	CLA Check Permission for Scanning
3	☐			Initiate CLA/DCS flow from Leganto	
4	☐			Partial Patron Digitization	Partial Patron Digitization - Link to scanned document
				Partial Digitization - non-	All non-faculty digitization

Configuration >
Fulfillment >
Copyright Management >
Digitization and
Copyright Rules

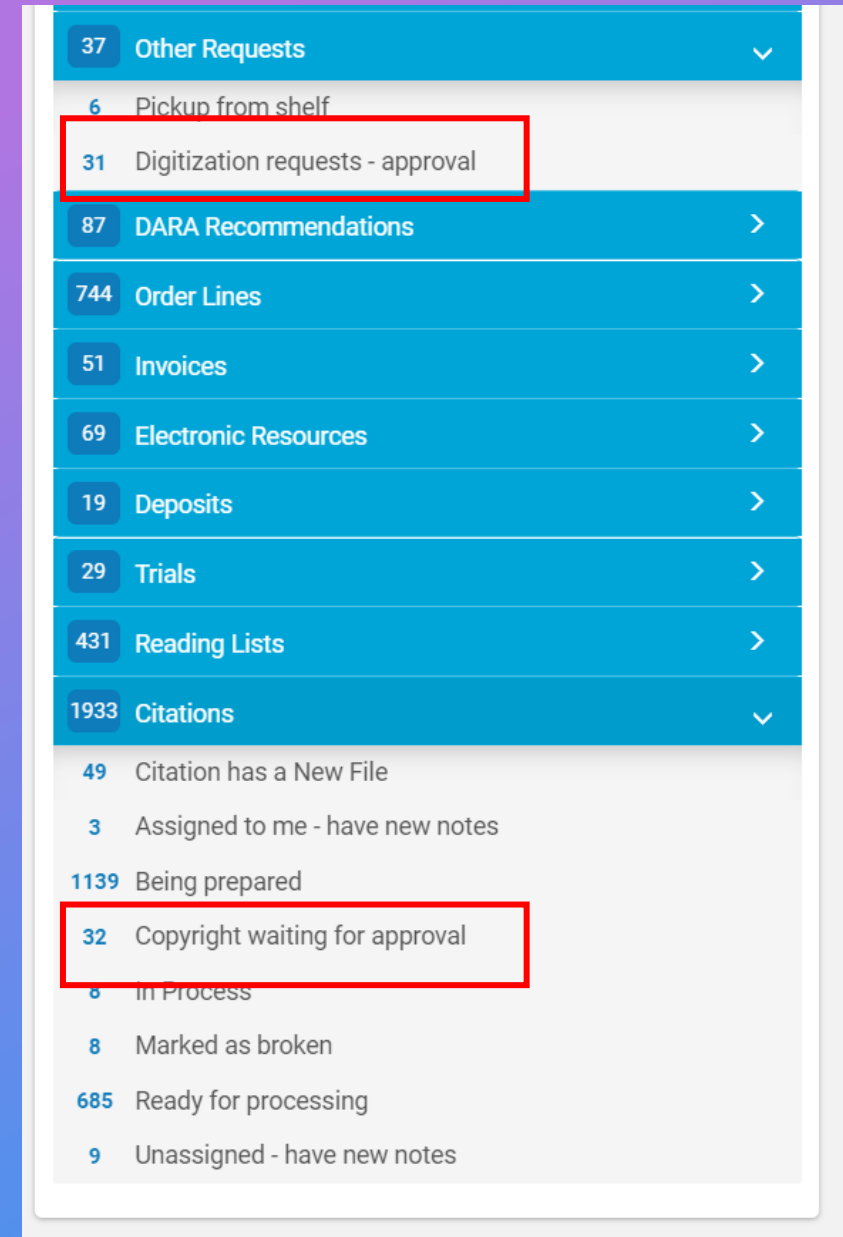
Agenda

- Questions to Consider First
- Copyright Considerations
- **Digitization and Copyright Workflows and Tracking**
 - Understand Which Resources Need Digitization
 - Understand Which Resources Require Copyright Approval
 - Leverage Digitization and Copyright Rules
 - **Process and Track Copyright Approvals**
 - Process Digitization Requests

Process Copyright Approvals

When a digitization request or copyright request results in a copyright approval workflow, the request is pushed to the task list

View under either "Other Requests-Digitization requests" or "Citations-Copyright waiting for approval" tasks



Citations–Copyright Waiting for Approval Task

- All citations with copyright status “Waiting for Approval”
- View citation details, then click on link to navigate to approval task list.
- If no link, this has been manually changed to “waiting for approval”

Edit Citations (1 - 20 of 32)

☐ Select All Copyright Status : Waiting for Approval ✕

1 ☐	Psychology MMS ID: 99231976400121 Book By Martin, G. Neil, (Pearson 2013.) ISBN: 0-273-75559-5 Subject: Psychology. -- Electronic books.	Request Status: Ready For Processing Resource Locate Status: Resource Located Copyright Status: Waiting for Approval / Work Available Electronically	Course Name: Child Development Course Code: child-dev123 Reading List: Child Psychology Requested for Review On: 02/09/2021 Created By: Dolav Ben-Artzi 02/09/2021 08:21 Modified By: Dolav Ben-Artzi 02/14/2021 11:13 Section Name: Week 2
● Physical (1) ● Electronic (2) Digital Other Citation Details ● Alerts(2) More Info			
2 ☐	Using Self-regulation to develop presentation skills in an integrated curriculum in higher education Article By Lindlöf, Ludvig (2018)	Request Status: Being Prepared Resource Locate Status: Information Incomplete Copyright Status: Waiting for Approval	Course Name: Copyright Science Course Code: COPY 500 Reading List: Copyright List Science Created By: Jessie Ransom 06/09/2020 16:29 Modified By: Jessie Ransom 11/18/2020 21:50 Section Name: Uploaded Files--Ask for CC
Physical Electronic Digital ● Other(1) Citation Details Alerts			

1 of 2

Other Requests–Digitization Request Approval Task

- All approval requests, including, those not associated with a course
- View minimal course details
- Approve copyright or view details of rule

Approval Requests List

1 - 20 of 805 Citation id [] []

Status: All Associated With Course: All

	Title	Course	Creation date	Requester	Digitization Type	Request Notes	Status	Resc Total Page
1	Winternähe Roman Mirna Funk	ANTH3003; LIT411;	02/16/2021	-	Partial	Chapter article title:Winternähe Roman; Chapter article author:Funk, Mirna; Start page:10; End page:180.	Approv...	342
2	Winternähe Roman Mirna Funk	ANTH3003	02/15/2021	-	Partial	Chapter article title:Winternähe Roman; Chapter article author:Funk, Mirna; Start page:10; End page:180.	Approv...	342

View
Work On
Filter by this record
View Rule
View hidden

Agenda

- Questions to Consider First
- Copyright Considerations
- **Digitization and Copyright Workflows and Tracking**
 - Understand Which Resources Need Digitization
 - Understand Which Resources Require Copyright Approval
 - Leverage Digitization and Copyright Rules
 - Process and Track Copyright Approvals
 - **Process Digitization Requests**

Process Digitization Requests

In parallel to - or after - the copyright approval workflow, the item is digitized:

1. Item is picked from shelf
2. Alma routes item to digitization department/desk
3. Item is digitized
4. Digitized file is added to citation (manually or automatically)
5. Request is marked as complete automatically
6. Alma routes physical item back to original location

Short Digitization Workflow

In parallel to or after the copyright approval workflow, the item is digitized.

1. Starting on the reading list, review citation details
2. Pull item (manually) and scan pages
3. From citation, click on “Deliver Digital Documents” and upload file
4. Scanned file is added to citation (manually or automatically)
5. Request is marked as complete automatically

Ensure student access

- Copyright must be approved
 - Approved, Self declared, Fair use copyright status
- Citation status impacts visibility
 - (Configuration > Leganto > List Management > Copyright Settings)
 - display_not_complete_files (true/false, default false)

Agenda

- Questions to Consider First
- Copyright Considerations
- Digitization and Copyright Workflows and Tracking
- **Additional Copyright Options**
 - **Add copyright statements to scans**
 - Manage Copyright Auditing Process
- Alternate Copyright Workflows
- Additional Resources

Add Copyright Statements To Scans (and other course materials)

- Configure when the statement appears:

Configuration > Leganto > List Management > Copyright Setting: copyright_declaration_notice

- Electronic, digital, file, link, all, blank (none); only if copyright record

- Configure the text:

Configuration > Fulfillment > Copyright Management > Copyright Declaration: Leganto Digitization Request Copyright Declaration

Copyrights statement

This fully adheres to international copyright laws.
If a user makes a request for or later uses a photocopy or reproduction for purposes in excess of copyright law, that user may be liable for copyright infringement.
I have read the above statement and agree to abide by its restrictions.

Close

Continue

Agenda

- Questions to Consider First
- Copyright Considerations
- Digitization and Copyright Workflows and Tracking
- **Additional Copyright Options**
 - Add copyright statements to scans
 - **Manage Copyright Auditing Process**
- Alternate Copyright Workflows
- Additional Resources

Manage Copyright Auditing Process

- The copyright attributes tab is filled in anytime that you manage a citation's copyright status using Alma's copyright approval system
- Dates are automatically assigned but can be changed
- Stored in the system, reportable in Analytics

Catalog > Alma > Course Reserves > Copyright > CLA Reporting Template - UK

Catalog > Alma > Course Reserves > Copyright - Reporting Template - Australia

The screenshot shows the 'Edit Reading List Citation' interface with the 'Copyright Attributes' tab selected. The form is divided into two main sections. The left section contains fields for 'Copyright Status' (set to 'Waiting for Approval'), 'Volume', 'Number of Students' (32), 'Number of Copies for Staff', 'Required Chapters', 'Required Pages' (From 1 To 2), 'Total Required Pages' (2), 'Includes image(s)' (checkbox), 'Date Available From' (02/13/2021), 'Note 1', and 'Note 3'. The right section contains 'Copyright Auditing Required' (checkbox), 'Issue', 'Number of Copies for Students', 'Resource Total Pages' (0), 'Total Chapters Count', 'Source for Copyright', and 'Date Available To' (02/28/2021). The 'Copyright Attributes' tab is highlighted with a red box.

Agenda

- Questions to Consider First
- Copyright Considerations
- Digitization and Copyright Workflows and Tracking
- Additional Copyright Options
- **Alternate Copyright Workflows**
 - **Manage Copyright Manually**
 - **Don't Want to Manage Copyright at All?!**
- Additional Resources

Manage Copyright Manually

- Simply check the citation and click on change copyright status.
- No effect on visibility in Leganto
- No copyright attributes tab
- Useful for informational purposes only (no subsequent workflow implications)

The screenshot displays the ExLibris interface with a modal window titled 'Change Copyright Status'. The modal contains a dropdown menu with 'Approved' selected and a 'Change Copyright Status' button. In the background, a table lists items, with the first item 'Science of the Sciences' selected. The interface also shows navigation tabs at the bottom: Physical, Electronic, Digital, Other(1), Citation Details, and Alerts. The top navigation bar includes links for Remove Citations, Remove Alerts, Change Copyright Status, and Change Status.

	Physical	Electronic	Digital	Other(1)	Citation Details	Alerts
1 ☒ Science of the Sciences Book Chapter						

Request Status: Ready For
Resource Locate Status:
Copyright Status: Not Det

Change Copyright Status

Approved

Change Copyright Status

Section Name: Uploaded Files--Fair Use

Don't Want to Manage Copyright at All?

- Course reserves automatic statuses table:

citation_uploaded_file parameter

- Set this to Complete
- Configure the File Upload Copyright Options mapping table:

Configuration > Leganto > List Management > File Upload Copyright Options

- Set at least one option that maps to either Approved, Fair Use or Self Declared.
- Ignore the task for citations with uploaded files

Upload files

1 — 2 — 



Type *
Document ✕ ▼

Title *
Chapter 1

 Chapter 1.pdf | 30.6 KB | [Remove](#)

Copyright information *

☐ Use of this resource complies with our institutional copyright policies.

Agenda

- Questions to Consider First
- Copyright Considerations
- Digitization and Copyright Workflows and Tracking
- Additional Copyright Options
- Alternate Copyright Workflows
- **Additional Resources**

Documentation

- [Copyright Management](#)
- [Configuring Leganto Copyright-Related Procedures](#)
- [Digitization Processing](#)
- [Manage Manually](#)
- [Configuring the Course Reserves Automatic Statuses Table](#)
- [Digital Fulfillment](#)

**Knowledge Center > Leganto >
Training > Webinars > Become an
Expert: Leganto**

Documentation

Integrating with External Copyright Agencies

CLA/DCS: [Documentation](#) / [Video](#)

CCC: [Documentation](#) / [Video](#)

Bolk: [Documentation](#)

Training Videos

- Managing copyright for citations
- Leganto-Alma Copyright Management

Question Time

Next Week

(Wed., June 12)



Optimizing the New Leganto User Interface



Thank You