

Managing Copyright for Citations

Copyright requirements vary significantly from one library to another. Your library will need to determine the appropriate copyright requirements for your institution. There are several configuration options which can support your copyright needs and workflows, including options to configure which types of citations require copyright approval, rules to approve copyright automatically, and integrations with regional copyright agencies. You can read about the configuration options in the online help.

In this session we'll show how to manage copyright workflows, including reviewing the copyright status, identifying resources which need to be approved, assigning a copyright status manually, and having the copyright status assigned automatically

For any citation, you can see the copyright status here. Let's filter the citations' so that we are only looking at the citations which require our approval. Out of the box, Alma is configured so that all citations will have the status of "Not Determined," but you may have configured Leganto to assign copyright status differently. For example, you may have citations which have a copyright status of Required or Waiting for Approval. In our case, we will choose Copyright status Not Determined. You can read about the different copyright statuses in the online help.

These are the citations that needs your attention. Your institution will use either manual approval workflows or automatic approval workflows, depending on how much information you need to track and for what purpose.

When you manage a citation's copyright status manually, the citation's copyright status is for informational and record-keeping purposes only. There is no workflow effect in Alma, and no effect on the visibility of the citation in Leganto.

To manually update the copyright status for a single citation, choose edit for the citation. When the edit reading list citation page opens, navigate to the Copyright attributes tab. In the dropdown list choose Approve and click Save [don't do, just go back].

You can also update the copyright status for several citations in bulk. Select the citations you would like to update

Click the Change copyright status link and Click on the dropdown box to see the list of copyright statuses. Choose Approved from the list and click Change Copyright status. Now the Copyright status for the selected citations has been changed to Approved.

As an alternative, you can manage a citation's copyright status using Alma's copyright approval system. In this case, citations will run through an automatic copyright approval process; and when required, will be sent to an operator for manual approval.

The Automatic copyright approval workflows allow you to configure rules that Alma will use to determine if copyright can be automatically approved. Then Alma will run a citation against this rule engine. For example, you can configure that if the needed resource is the only chapter of a book that is required, the copyright is automatically approved. If later on you change information which relates to copyright, such as the page range or the course dates, you will need to re-evaluate the copyright. Note These resources will only be available to students during the dates specified, generally the dates of the course.

Click on Edit for a Citation, navigate to the Copyright attributes page and enable the copyright auditing required checkbox.

Enabling the checkbox will expand the copyright attributes page to include a number of additional fields. At this point, the ability to manage the copyright status manually is disabled. The information entered here will be used by Alma's automatic copyright approval process, to determine the percentage of the work required and the dates required for example. Make any changes as required, then click Save, which runs the automatic copyright check. Here we can see that the copyright status has been approved, based on the rules we have configured, as well as the rule name.

If a citation's status cannot be handled automatically, the citation will have the copyright status Waiting for Approval [responsible leadership as virtual leadership] and it will also be in the task list for Citations—copyright waiting for approval, which is filtered to all the citations which are waiting for approval.

As the person responsible for approving the copyright status, you can click on the link Waiting for Approval, view the request, including other times this item has been requested, then click on actions—work on. Now you can fill in additional information about the approval as appropriate, including uploading a file if necessary, and click on either reject or approve to complete the approval workflow.

And this was an overview of how to manage copyrights for citations.

Thank you for joining!