Rapido Extended Training  
Copyright Management

Hello, Copyright management is part of the borrowing resource sharing workflow. There are a variety of ways that libraries approach the nuances of copyright management. Rapido supports these different needs by offering borrowing copyright rules. The rules will automate or mediate borrowing requests, allowing you to review and update them if needed. In this session you will learn how to configure Borrowing Copyright rules and how these rules impact the borrowing requests.

To create a borrowing copyright rule go to Configuration> Resource Sharing> Rapido Rules> Borrowing Copyright Rules. This is your institution Rules List. If this list is empty, Rapido will apply this Default Rule on all borrowing Requests. Using the Row action list you can Edit, Duplicate or Delete each rule in the list. Or you can Add Rule. Let's Edit Rule of Five to see what a rule looks like before we create a new one.

Under the Borrowing Copyright Rule Editor section, you can see the Name, Description, when it was created and when it was last updated. The Input Parameters determine on which requests this rule will apply. This rule will apply on Digitization requests, for content that was published in the last 5 years and has more than 5 requests in the last calendr year. The Borrowing Copyright Setup determines what will happen to the requests that meet these criteria. With this configuration, the request will be automatically approved and sent to the lender. The other option here is Blocks digitization workflow - this configuration would stop the request for mediation. Regardless of the automation or mediation, the label, in this case ruleoffive label will be attached to the request. Labels can be useful for performing analytics to assess your copyright compliance. for example, how many requests met the criteria of this rule in the last year.

Let’s create a new rule. Click Add Rule. I would like to stop all the digital requests where the requested content accounts for more than a percentage of the work. In this case, 11% is the threshold. so with this rule I can review digitization requests that make up more than 11% of the work. Let's give it a Name and Description, make sure the name will be informative enough for other users to understand.

For the Input Parameters click Add Parameter. I'll select Request Type equal Borrowing resource sharing digitization request for only digital requests, and Add Parameter. And I'll add another Parameter for the work percentage. Name: Total Copyright Work Percentage, greater than 11 and Add Parameter.

Now that I have my parameters, let's configure how requests that meets these criteria will be handled. In the Borrowing Copyright Setup, I check the Copyright Clearance, and then select the Blocks digitization workflow. I would also like for those requests to be labeled with a Digitization\_over\_11% label. You can choose an existing or create a new label here. And Save. Here it is added to our list. You can Enable or disable each rule, or you can change their order in the Move Up and Move Down arrows. Rapido will run the rules on the requests in this order.

Now let's check how these rules impact the requests. Go back to Rapido Resource Sharing. Under Borrowing requests, staff can create sets that pertain to the mediated requests. All items needing copyright mediation will be at the pending status which can be used for making a set. You will only see the requests that were blocked, since the Automatically approved ones were already sent to the lender.

Here's a set I've created for the copyright rule using the Digitization\_over\_11% label, with the requests that met the rule's criteria and stopped. You can create a set based on any rule you want. Click Edit to review the request. Once you're done, under Copyright Status, you have 3 options:

Copyright approved and No copyright restriction: changes the request status to request sent to partner.

Copyright not approved: will allow staff to further engage with the request to determine the appropriate course of action. These statuses are available in analytics alongside the labels for future assessment. And Save.

Now you know how to manage your library's copyright needs using borrowing copyright rules.

Thanks for watching!