EQUELLA®

Copyright Resource Management (CA and CLNZ) User Guide

Version 6.4

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Copyright compliance overview

The EQUELLA copyright compliance features do not restrict the amount of copyright material that can be contributed to the repository: they do restrict the amount of copied content which can be active at any time – i.e. copyright compliant content cannot be viewed by course users until it has been activated. Any number of resources can be active at a particular time as long as they comply with *Part VB* of the *Australian Copyright Act 1968 (as amended)* and the *New Zealand Copyright Act 1994 (and subsequent amendments)*. Further information on copyright compliance management is provided in the *EQUELLA Copyright Compliance Overview (CA and CLNZ) Guide.*

The purpose of this guide is to provide content contributors, such as lecturers, teachers librarians and content administrators with examples of the copyright resource contribution, activation, management and reporting process.

Please note that this guide has been developed to best reflect the full capabilities of EQUELLA and as such may differ in appearance to your own installation and as it is based on Australian and New Zealand Copyright regulations it will have varying levels of applicability around the world. Contact the system administrator for access to extra features or to reconfigure your installation.

Where possible the examples in this guide use the Collections, Contribution Wizards and Power Searches provided in the EQUELLA Vanilla Institution. (Note: There are no workflows associated with these vanilla collections and hence the resources do not go through a moderation process.)

Contribute copyright compliant resources

EQUELLA enables users to create, manage and search for copyright compliant content such as images, audio, video, packaged content, web links, text, PDF and MS Office™ documents.

Training tasks

In this guide, the user will:

- Contribute resources to the EQUELLA Digital Repository:
 - Contribute a holding resource using the federated search method;
 - Contribute a holding resource using the library search method;
 - Contribute portion resources.
- Activate the portion resources.
- Browse for activated resources.
- Perform a Power Search to find contributed resources.
- Manage the activated resources.
- Generate a copyright report.

Contribute resources

EQUELLA copyright compliance management involves interrelated collections.

Typically these include two separate holding collections to easily differentiate the types of copyright content and are typically a book collection and a journal collection. The holding collections contain holding resources that consist of information (metadata) about the resource such as book or journal details.

The portion collection stores portion resources that each contain copyright content such as the scanned chapter of a book or article from a journal. During contribution the portion resources are linked to the appropriate holding resource. An example is shown in Figure 1.

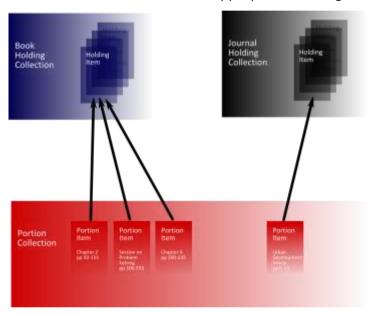


Figure 1 Typical copyright collections

In this section the user will contribute a resource a resource to the book holding collection then contribute portion resources that are linked to the book holding resource.

EQUELLA Digital Repository

To access EQUELLA

1. Open a browser and enter your EQUELLA URL (e.g. http://equella.myinstitution.edu) and log in.

The examples in this section are as follows:

- Contribute a holding resource (e.g. *Rights and inequality in Australian education*) to the holding collection (e.g. *Books*).
- Contribute various portion resources (e.g. *Chapters 2 & 4*) to the portion collection (e.g. *eReserve articles*) and link them to the appropriate source resource (e.g. *Rights and inequality in Australian education*) in the holding collection (e.g. *Books*).

Contribute holding resources

Resources that are contributed to holding collections only contain information (metadata). This is typically records of books and journals and includes details such as titles, authors, editors etc.

The first step is to contribute a resource (e.g. *Rights and inequality in Australian education*) to the holding collection (e.g. *Books*). When contributing a resource, for example a book to a holding collection the resource can be added using the following methods:

- **Holding collection contribution wizard**—allows users to manually add information and contribute a resource to the selected holding collection.
- **Remote repository**—allows users to search for records from a variety of external sources such as a library database. Information for the resource can automatically be imported into a contribution wizard saving time and increasing accuracy.

Because a holding resource must exist for every contributed portion resource, holding resources can also be contributed during the portion resource contribution process using the following methods:

- Remote repository/Library search—allows users to search for records from a variety of external repositories and automatically import information from Z3950 sources into a contribution wizard for the selected holding type.
- **Contribution wizard**—allows users to manually add information and contribute a resource to the holding collection for the selected holding type.

Contribution wizard contribution method

Each resource that is contributed is saved in a customised collection and each collection belongs to a category.

To contribute a resource to a collection

1. Select **Contribute** from the navigation menu. The **Contribute** page displays with a list of categories and collections. An example is shown in Figure 2.

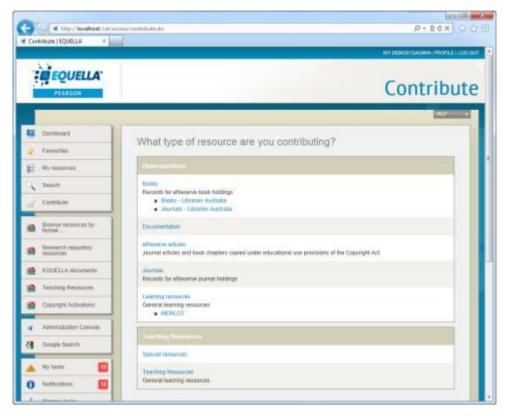


Figure 2 Contribute page

2. Select a collection from the list (e.g. *Books* in the *Demonstration* category) to display the Contribution Wizard associated with the selected collection. An example is shown in Figure 7.

Further information on contributing resources is provided in the *EQUELLA Contribution User Guide*.

(NOTE: Holding resources only contain details about the book or journal.)

Remote repository/library search contribution method

A remote repository search allows users to search multiple external sources such as university library databases and choose to have the returned results automatically added to fields in the holding collection wizard. Using remote repositories can increase accuracy and is quicker than entering information manually. Further information on remote repositories is provided in the *EQUELLA Remote Repositories Configuration Guide*.

To search for source information

- 1. Select **Search** from the navigation menu. The **Search** page displays.
- 2. Click the Within drop-down and select the appropriate remote repository (e.g. *Books Libraries Australia*) from the **Remote** repositories category. An example is shown in Figure 3.



Figure 3 Select remote repository

The **Books – Libraries Australia** remote repository page displays. An example is shown in Figure 4.



Figure 4 Books - Libraries Australia remote repository search

Select **Title** from the **Where** drop-down, enter a search term in the search box (e.g. australian education) then click to display a list of search results. An example is shown in **Figure 5**.



Figure 5 Remote repository search—results page

3. Select an appropriate resource (e.g. *Rights and inequality in Australian education*) to display detailed results. An example is shown in the Figure 6.



Figure 6 Remote repository search—example result record details

To automatically add information to the holding collection wizard

4. Click to display the holding collection (e.g. *Books*) contribution wizard with some fields automatically populated with information returned from the search. An example is shown in Figure 7.

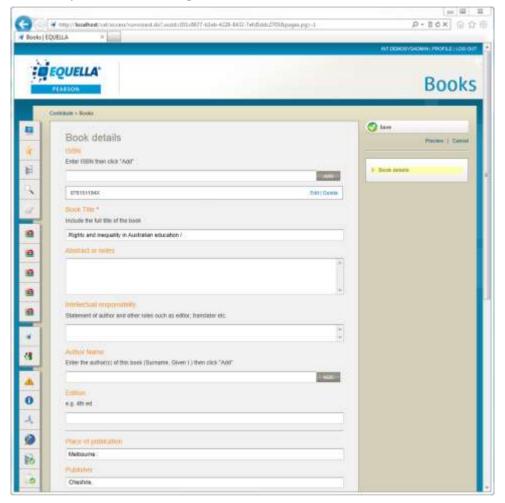


Figure 7 Holding contribution wizard—with pre filled fields

The contribution wizard is used to gather information relating to the contributed resource.

To complete the contribution process

- 5. Enter all required information for the resource being contributed.
- 6. Review the information then click to display a confirmation dialog.
- 7. Click PUBLISH to display the Resource summary page. An example is shown in Figure 8.

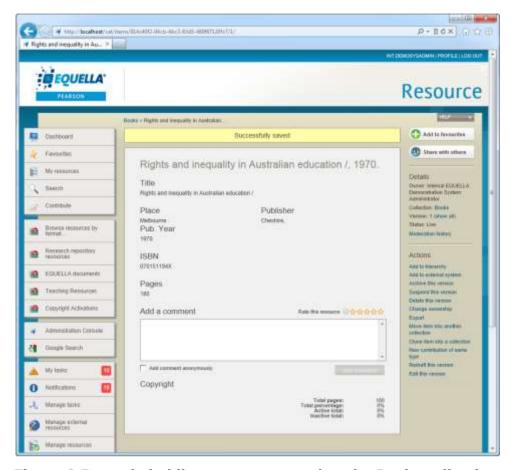


Figure 8 Example holding resource saved to the Books collection

The next step is to add portion resources (e.g. *Chapters 2 & 4*) to the portion collection (e.g. *eReserve articles*) and link them to the holding resource (e.g. *Rights and inequality in Australian education*) in the holding collection (e.g. *Books*).

Contribute portion resources

Resources that are contributed to portion collections contain the content. This is typically scanned or copied extracts from books or journal articles.

When contributing a portion resource such as a book chapter or journal article to the portion collection, it must be linked to an appropriate book or journal source resource in the holding collection.

To contribute resources to the portion collection

1. Select Contribute from the navigation menu then select the portions collection (e.g. *eReserve articles*) to display the portion collection contribution wizard. An example is shown in Figure 9.

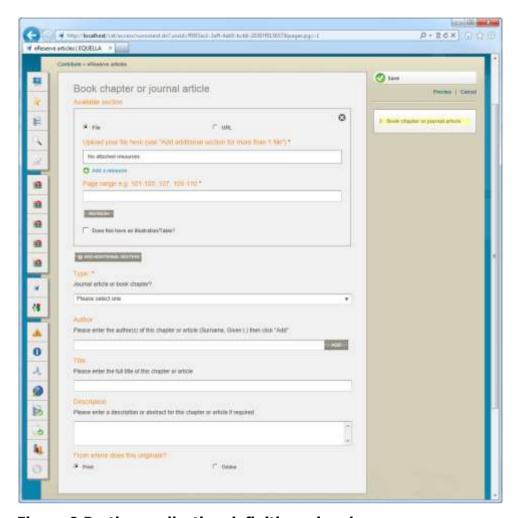


Figure 9 Portions collection definition wizard

Portion resources are typically scanned or copied files that can be attached to the resource.

To add an attachment

- 1. Select the resource type (e.g. File).
- 2. Click the **Add a resource** link to browse for and add the scanned or copied file (e.g. *Education comparisons*.docx). Note that only one file can be attached. An example is shown in Figure 10.
- 3. Enter the **Page range** (e.g. 12-23). An example is shown in Figure 10.
- 4. Select a category from the **Copyright Status** drop-down list (e.g. *Copyright*) to display controls for the selected type. An example is shown in Figure 10.

In the example collection, book chapters or journal articles can be added. Selecting a *Book* holding type displays different fields to selecting a *Journal* holding type.

To add an additional section

1. Click the O ADD ADDITIONAL SECTION button and repeat steps 1-4 above.

To select the holding type

1. Select the holding type from the **Type** drop-down list (e.g. *Book extract*) to display controls relevant to the selected type. An example is shown in Figure 10.

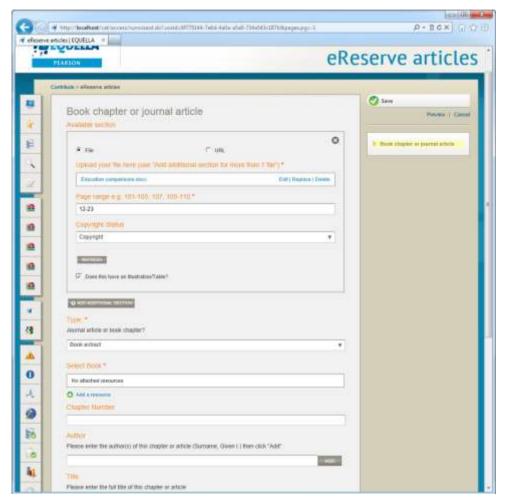


Figure 10 Portions collection—with type selected

To link the portion resource to the holding resource

1. Click the **Add a resource** link in the **Select Book** section to display the **Select** page with the search. An example is shown in Figure 11.



Figure 11 Search for holding resource

Existing EQUELLA holding resources can be selected using the **Search, Recent** or **Browse** portlets.

When an existing holding resource cannot be located it can be added using the **Contribute** options available from the **Select** page. Further information is provided in the <u>Contribute holding resources through the portion collection</u> section on page 18.

To find a previously contributed holding resource

1. Either:

- a. Enter appropriate search criteria (e.g. australian education) in the Search box then click the button to display the results page. An example shown in Figure 11; or
- b. Select a resource from the Recent portlet to display the Resource summary page within the Select page. An example is shown in Figure 11.
- 2. Select the appropriate holding resource (e.g. *Rights and inequality in Australian education*) to display the Resource summary page within the **Select page**. An example is shown in Figure 12.

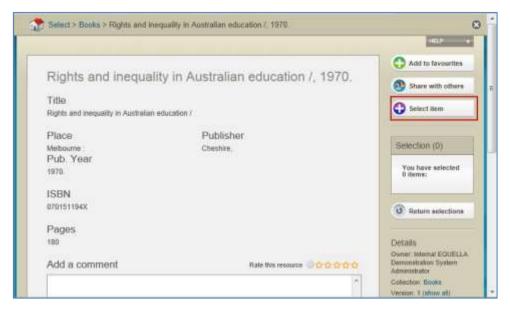


Figure 12 Select page with resource summary

3. Click Selectitem . The **My selections** page displays. An example is shown in Figure 13.



Figure 13 My selections page

- 4. Click RETURN SELECTION ►. The **Edit resource details** dialog displays.
- 5. Click Save . The Book displays in the **Selection** table, with *Edit*, *Replace* and *Delete* links. An example is shown in Figure 14.

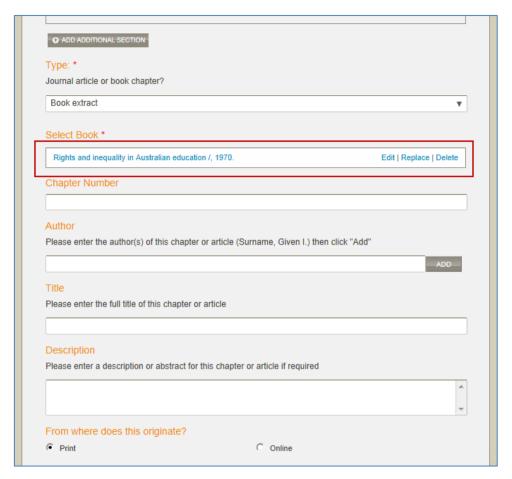


Figure 14 Selected book

- 6. Enter the required information in the **Chapter Number, Author, Title, Description** and **From where does this originate?** fields, if relevant.
- 7. Click the save button, then select button, then select summary page, with the holding resources details displayed. An example is shown in Figure 15.

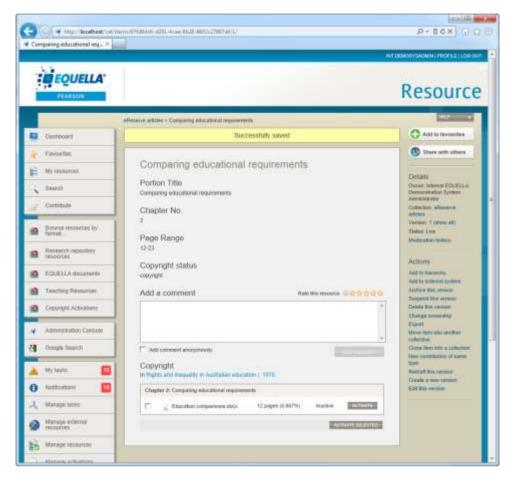


Figure 15 Holding resource Resource summary page

8. Add at least one more portion resource (e.g. *Chapter 4, The inequality debate*) to the *Rights and inequality in Australian education* holding resource.

Resource activation rules

Typically a portion resource can be activated using the following rules:

- **For books**—only 10% or one chapter of a book can be activated at the one time. When a chapter number is not entered then the resource can only be activated if its portion size is less than 10% of the book. The chapter number can be a Roman numeral, a decimal and include alphabetic characters, examples such as: *vi*, *IV*, *XX*, *table 9.6*, *Appendix 3*, *Introduction*, *19 fact sheet*, *1.10*.
- **For journals**—only one article from a journal can be activated at one time unless multiple articles have the same topic and then they can all be activated.

To view the holding resource with associated portion resources

- 1. Select **My resources** from the navigation menu.
- 2. Select the holding resource (e.g. *Rights and inequality in Australian education*) to display the **Resource Summary** page. An example is shown in Figure 16.

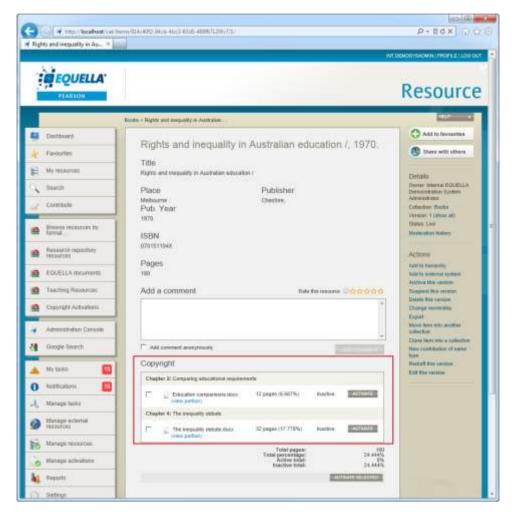


Figure 16 Holding resource with associated portion resources

The Resource summary confirms that the two portion resources (*Chapters 2 & 4*) contributed to the *eReserve articles* collection are linked to the appropriate *Books* holding resource (*Rights and inequality in Australian education*). The **Total pages, Total percentage, Active total** and, **Inactive total**, portion percentage and activation status for the holding resource and the portion resources are displayed. In this example, all of the chapters are currently *Inactive*.

Once portion resources are contributed to the portions collection and linked to the parent holding resource they can be activated. Further information is provided in the <u>Activate</u> resources section on page 21.

Contribute holding resources during the portion contribution wizard

When a portion contribution wizard includes a resource selector control and the holding resource does not exist, it can be contributed using the following methods:

• **Contribution wizard**—allows users to manually add information and contribute a resource to the holding collection for the selected holding type. Clicking the **Add a**

resource link in the holding resource selection field, then selecting from the **Contribute portlet** on the **Select** page opens the holding resource contribution wizard. An example is shown in Figure 17.

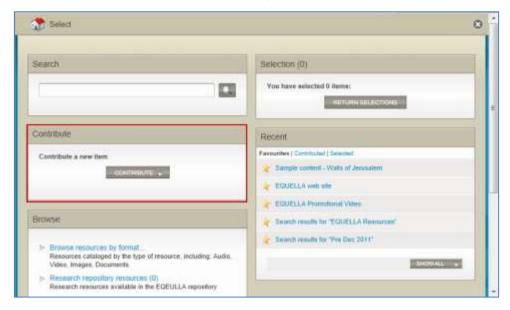


Figure 17 Select page - Contribute portlet

Refer to the <u>Contribution wizard contribution method</u> section on page 6 for more information.

• Remote repository/Library search—allows users to search for records from a variety of external sources and automatically import information from Z3950 sources into a contribution wizard for the selected holding type. Clicking the Add a resource link in the holding resource selection field, then clicking in the Search portlet opens the Select > Search page. An example is shown in Figure 18.

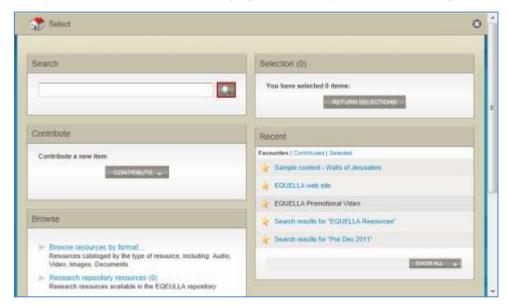


Figure 18 Select page - click magnifying glass icon to open full search

• Click search other repositories and select a remote repository to search. Refer to the Remote repository contribution method section on page 7 for more information.

Activate resources

The copyright compliance features do not restrict the amount of copyright material that can be contributed to the repository but do restrict the amount of copied content active at any time to that allowed by CAL, simplifying management of copyright materials.

Managed copyright compliant content cannot be viewed by course users until it has been activated for a course.

In this section the user will activate two chapters from the same book against the *EQUELLA* 101 course. One chapter is activated, however, the other chapter is not as it violates the copyright requirements.

Activate resources

Any number of resources can be active at a particular time as long as they comply with *Part VB* of the *Australian Copyright Act 1968 (as amended)*. Content is activated when it is added to a course. Activation is initiated from the **Resource** summary page of the holding resource (an example is shown in Figure 16) or the **Resource** summary page of the portion resources (an example is shown in Figure 19).

In this section resources are activated from the portion resource summary page.

Activate a portion resource

- 1. Select **My Resources** from the navigation menu.
- 2. Click on a portion resource to activate (e.g. *The inequality debate*) to display the **Resource** summary page. An example is shown Figure 19.

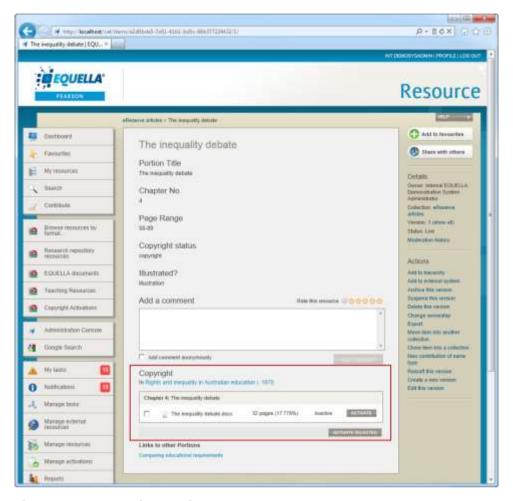


Figure 19 Example portion Resource summary page

To activate a single portion resource

1. Select the checkbox for the portion in the Copyright section, then click display the **Activate attachments** page. An example is shown in Figure 20.

To activate multiple portion resources

1. Select the checkboxes for the relevant portions then click the **Activate Selected** button. (Note: When multiple portions are selected they cannot be activated if their combined size violates the copyright portion rules such as 10% of a book.)



Figure 20 Activate attachments page

Activation requires that course and time frame details are entered, as the content is only made available to course users for the specified dates.

To link the portion resource to a course

- 1. Select a **Course** from the drop-down list (e.g. *EQUELLA 101*).
- 2. Select **Make live from** and **Make live until** dates for the resource to be available online.
- 3. Select a **Citation** from the drop-down list (e.g. *Generic*).
- 4. Click ACTIVATE to display the **Resource** summary page with *Active* portion resource. An example is shown in Figure 21.

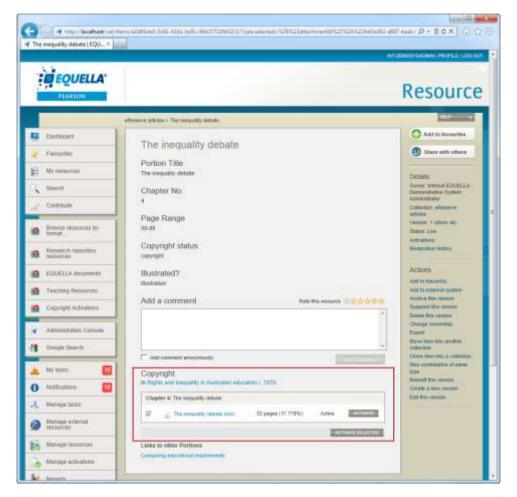


Figure 21 Resource summary page for activated portion resource

NOTE: If the chapter is over 10% of the book the system allows the user to activate it because it is still only one chapter.

Activation signals to the copyright compliance features that content usage is now recorded and copyright compliance enforced.

Activation records the following information:

- Portion resources activated
- Course details including the number of users
- Period of use.

Activate another portion resource

To confirm that the activation triggers are working, another portion resource from the same holding resource needs to be activated. The system should display an error message and the portion resource should not be allowed to be made active.

1. Select the **My Resources** option and select a different portion resource to activate (e.g. *Comparing educational requirements*) to display the **Resource** summary page. An example is shown in Figure 22.

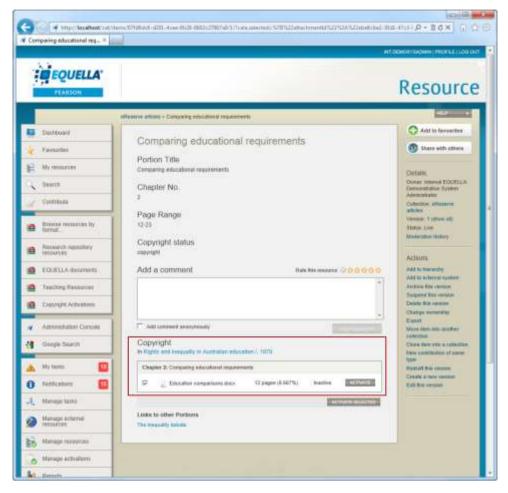


Figure 22 Second example portion Resource summary page

- 2. Select the checkbox for the portion then click ACTIVATE to display the **Activate Attachments** page, an example is shown in Figure 20.
- 3. Select the course (e.g. *EQUELLA 101*) and **Make live from** and **until** dates for the resource to be available online then click ACTIVATE.

Because the portion violates both the 10% and one chapter CAL rules a **Copyright problem** page is displayed. An example is shown Figure 23.



Figure 23 Copyright violation error message

- 4. Respond appropriately to the message, for example email the content administrator.
- 5. Click OK.

The portion resources can also be activated from the **Resource** summary page of the holding resource. An example is shown in Figure 16.

Copyright agreements

Users must accept the agreement conditions to view the portion resource. For information regarding the configuration of agreements, see the *EQUELLA Copyright Configuration* (*CAL*) *Guide*. An example is shown in Figure 24.



Figure 24 Copyright agreement

Perform advanced search

A collection can comprise hundreds of resources and an advanced search can be a very useful tool for finding activated resources.

There are multiple search options in the example advanced search, one option or any combination of options can be used to find a resource.

To use an advanced search to find a resource

1. Select **Search** from the navigation menu. The **Search** page displays.

2. Click the **Within** drop-down list and select the relevant advanced search (e.g. *eReserve*) from the **Advanced search** category. An example is shown in Figure 25.

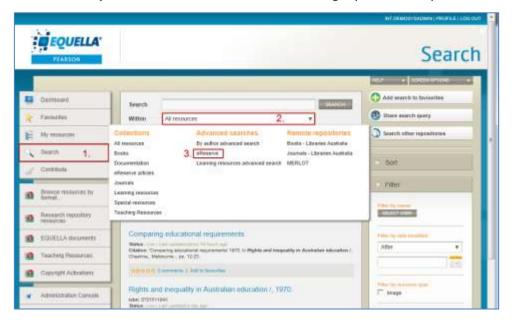


Figure 25 Access advanced search

The **Advanced search** criteria page displays. An example is shown in Figure 25.

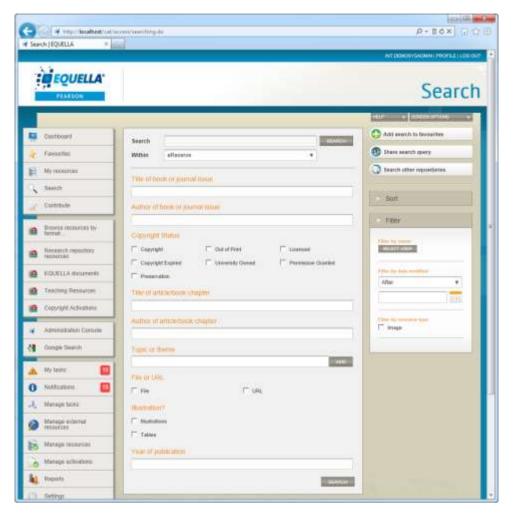


Figure 26 Advanced search criteria page

- 3. Enter the appropriate search information (e.g. *Copyright*).
- 4. Click search to display the results. See the *EQUELLA Advanced Search Configuration Guide* for further information.

Manage activations

Administrators can conveniently control activated resources through the Manage Activations function and the resource's Copyright page.

All previously activated resources are displayed on the **Manage Activations** page and the resource's **Activations** page. Resources can be deactivated, deleted or rolled-over from the Manage Activations page and deleted from the resource's Activations page.

In this section the user will use the Rollover Activations feature to deactivate an activated resource and then activate it against a new course.

Administer activations

Activated resources can be managed from the **Manage Activation** page and the resource's **Activation** page.

Manage Activations page

Portion resources having a resource status of *Active*, *Pending* or *Inactive* (when activation has expired) can be managed from the **Manage Activations** page. Individual or multiple activated resources can be deactivated, deleted or rolled-over.

To access the activations:

1. Select **Manage Activations** from the navigation menu. The **Manage Activations** page with a list of activated resources.

The search results can be filtered by *Course*, *Owner* or *Activation range*. An example is shown in Figure 27.

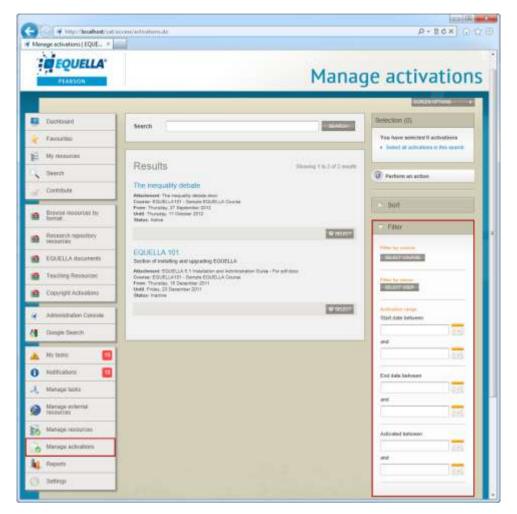


Figure 27 Activated resources

The following operations can be selected from the **Bulk Operations** drop-down list:

- **Delete Activations**—deletes the activation and any recorded information for the activation. This option should only be used if a resource has been incorrectly activated as activations that are deleted are not included in the CAL Report.
- **Deactivate**—sets the end date of active activations to the current date and sets the status to *inactive*. The period of activation in the CAL report is from the initial date of activation until the date of deactivation.
- Rollover Activations—can reactivate all portion resources that were activated
 against a course during a given period, against the same or a different course for a
 new period.

To select activations

1. Click the steet button for each required resource.

To roll-over activations

1. Select the resources to be rolled-over, then click Perform an action actions dialog displays. An example is shown in Figure 28.

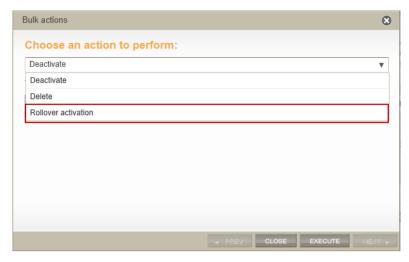


Figure 28 Bulk action dialog

2. Select **Rollover activation** from the drop-down list, then click _____. The **Rollover activations** dialog displays. An example is shown in

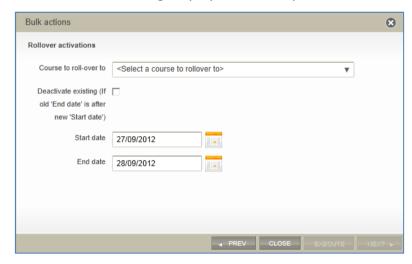


Figure 29 Rollover activations dialog

Portion resources can be rolled over from one course to another at the end of a course, or during the semester by deactivating them from the old course and adding them to the new course.

- 3. Select a new **Course to roll-over to** from the drop-down list (e.g. *EQUELLA 202*).
- 4. Check the **Deactivate existing** checkbox if the resource is currently active and the activation period is not due to finish before the roll-over activation begins.
- 5. Select a Start date and End date.
- 6. Click **EXECUTE** to display a confirmation dialog.
- 7. Click to display the **Manage Activations** page. An example is shown in Figure 29.

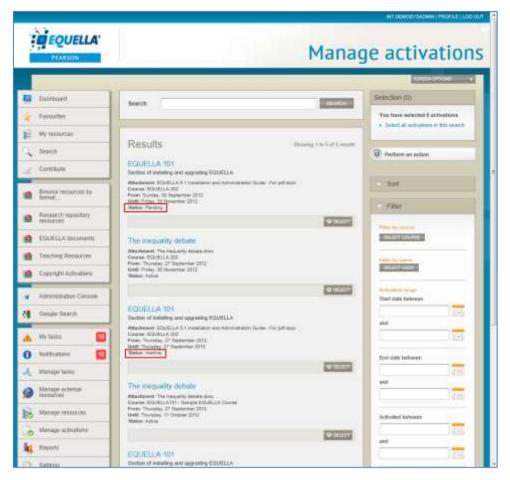


Figure 30 Activations confirmation page

As highlighted this example the original activation status has changed from *Active* to *Inactive* and the rolled-over resource status is *Pending*.

The activation states include:

- Inactive—not currently activated.
- Active—currently activated.
- Pending—date set for future activation.

To deactivate activations

- 1. Select the resources to be rolled-over, then click Perform an action . The **Bulk** actions dialog displays.
- 2. Select **Deactivate** from the drop-down list, then click confirmation dialog.
- 3. Click close to display the **Manage Activations** page.

To delete activations

1. Select the resources to be rolled-over, then click Perform an action . The **Bulk** actions dialog displays.

- 2. Select **Delete** from the drop-down list, then click to display a confirmation dialog.
- 3. Click close to display the **Manage Activations** page.

Copyright page

Copyright activated resources are displayed on the holding and portion resource's **Activations** page. Resource activations can be deleted from the Activations page.

To view the resource's activation page

- 1. Select an activated resource to display its **Resource** summary page. An example is shown in Figure 21.
- 2. Select **Activations** from the **Details** section. The **Activations** page displays. An example is shown in Figure 31.

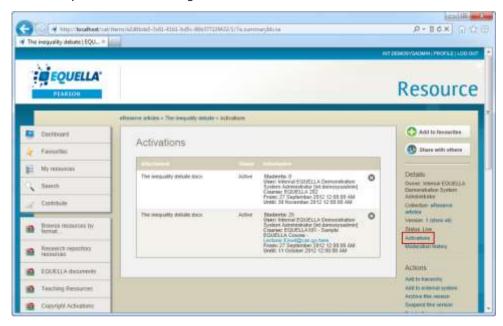


Figure 31 Activations page

To delete activations

1. Click the ^{SS} button next to the required resource then click ox to confirm.

Copyright (EUS) Reports

EQUELLA generates electronic use survey (EUS) reports that show all activated content for the reporting period. The reports are presented using the Australian Copyright Agency layout in HTML, Word, Excel or PDF format and are appropriate for the Australian *Copyright Agency (CA)*.

Generate an EUS report

Copyright compliance reporting collates copyright usage data recorded by the copyright compliant features and aggregates it by holding resource type.

To access the report

1. Select **Reports** from the navigation menu to display the **Reports** page with a list of reports. An example is shown in Figure 32.

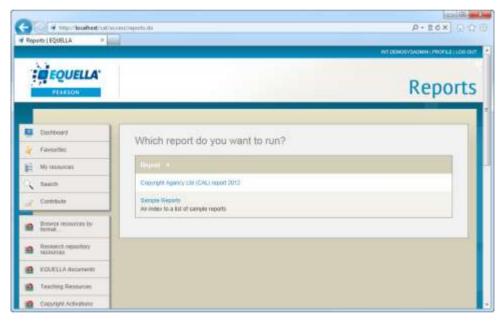


Figure 32 Reports page

- 2. Select the report (e.g. *Copyright Agency LTD (CAL) report 2012*). A confirmation dialog displays.
- 3. Click to display the report's parameter page.
- 4. Enter the parameters for the reporting period, an example is shown in Figure 33.

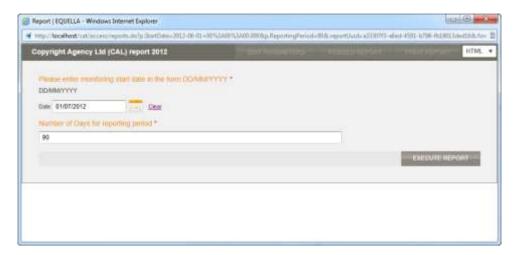


Figure 33 Report parameters

5. Click to display the report listing all activation details. An example is shown in Figure 34.



Figure 34 Generated EUS report

The reports are presented using the EUS layout in HTML, Word, Excel or PDF format and can be copied into a spreadsheet application.

Contact Client Support

We are always happy to help.

If your organisation has a support agreement with EQUELLA then help is available at $\underline{\text{Support}}$