

Tipasa®

Copyright management

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Learning objectives

For libraries in the United States, after completing this course, you should be able to:

- Configure copyright management options
- Track copyright compliance for ILL requests requiring royalty payments
- Interpret the copyright queue
- Select the appropriate option in the copyright clearance section of a request
- Use Tipasa copyright reports

U.S. copyright: CCG and CCL

- **CCG: Complies with Copyright Guidelines**
 - Your library does not subscribe to the journal AND the publication date is within the last 5 years
 - With CCG, you should request only 5 copies per title in a year
- **CCL: Complies with Copyright Law**
 - Your library subscribes to the journal OR the publication date is more than 5 years ago
 - No limit on number of copies you can request under CCL

Copyright management features

- View copyright clearing in separate queue, if desired
- For copy requests for publication date within last 5 years:
 - Match to previously borrowed titles and track times used
 - Mark as:
 - CCG (cleared for fair use)
 - Clear with fee payment required (CCG) (obtain cost from CCC)
 - Other
- View and export copyright information by title, edit copyright usage and view and export data about payable copyright fees

Copyright management


- Without copyright management

**Copyright
Compliance**

CCG: Conforms to CONTU Guidelines CCL: Conforms to U.S. Copyright Law None

- With copyright management turned on


▼ Copyright Clearance

 Previously requested title matched.

Matched with

- English journal
- ISSN: 00138274
- OCLC Number: 1325886
- Total uses: 6

Total uses 6 (1 of 6 pending fulfillment)

[Check for similar previously borrowed titles](#) 

Copyright Clearance

Clear for Fair Use (CCG)

Clear with fee payment required (CCG)

Other

Cancel request and do not clear

Copy requests can be “automatic”

- If request matches an applicable automation...
- And a Proven Sender fills the request using Article Exchange...
- Then patron is notified and can access article in My Account
- Without intervention by borrowing library
- (and for CCG requests, use count for that title will be automatically incremented, if there is a valid issue date in the request)

Patron view of copyright compliance statement



Copyright Compliance statement:

The copyright law of the United States [Title 17, United States Code] governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the reproduction is not to be used for any purpose other than private study, scholarship, or research. If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use," that use may be liable for copyright infringement.

I acknowledge that I have carefully read and understand the copyright compliance statement above.

[Proceed](#)

Copyright queue

The screenshot shows the WorldShare Tipasa® home page. The left sidebar contains a navigation menu with the following items: Tipasa® Home, Discover Items, Find Patrons, Borrowing Requests (expanded), AE Alert (1), Copyright (4) (highlighted with a red box), New For Review (7), Not Reviewed (7), Produced (15), Awaiting Response (10), In Transit (4), Unfilled (1), Received? (1), Received (4), Received/In Use (4), Overdue (4), Returned, Create Request, Document Delivery, Lending Requests, Purchasing Requests, Off-System Requests, Print Queue (0), and Manage Copyright.

The main content area is titled "Tipasa® home" and includes a "Quick search" section with a search bar for requests, radio buttons for "Active requests" (selected) and "Closed requests", a "Request ID" dropdown, and a "Refresh" button. Below this is a section for "Active request tags" with a search bar and a "Manage all tags" link. A message states "No matching tags found."

The "Quick links" section is organized into three columns: Borrowing, Lending, and Other. The Borrowing column contains links for AE Alert (1), Copyright (4) (highlighted with a red box), New for review (7), Not reviewed (7), and Produced (15). The Lending column contains links for Can you supply? (3) and New - Loans (3). The Other column contains links for OCLC Policies Directory, OCLC Service Configuration, OCLC Usage Statistics, OCLC Article Exchange, Resource Sharing News, WS ILL Training Resources, and OCLC Community Center.

At the bottom, there is a "Turnaround time" section with tabs for Lending and Borrowing.

Copyright queue

Borrowing Requests: Copyright (4)

Batch actions to "Cop

3 CCG requests for this title this calendar year. Of those 3, 2 have been filled; 1 is pending

Export All

Copyright Payments Total **\$0.00** ?

Results 1 - 4 of 4

Rows 20

Used	ID	Media Type	Title	Patron	Date Requested	Need Before
3 (1 of 3 pending)	169177164		Performance improvement quarterly.	Smith, Sara	08/02/2015	09/16/2015
?	169157986				08/02/2015	09/01/2015
?	168837922				08/02/2015	09/16/2015
?	168753228		Performance + Instruction	Green, Joseph	07/22/2015	09/01/2015

Request does not match title in your copyright table (e.g., no ISSN or OCLC # in request)

Results 1 - 4 of 4

Rows 20

Copyright matching

- Tipasa attempts to match copy requests to records in your library's copyright table using ISSN and OCLC number
- If request contains neither ISSN nor OCLC number:
 - In copyright queue > Used column, ? displays
 - In copyright section of request, message displays:
“This request has neither ISSN nor OCLC # for copyright matching.”
- If no matches or multiple matches:
 - In copyright queue > Used column, ? displays
 - In copyright section of request, message displays:
“No previously borrowed journal matches found.”

No match found

Request Details (Request ID 177927831)

Source	PATRON
Status	Not Reviewed
Title / Journal	Performance improvement quarterly
Uniform Title	
Author	
Publisher	[unknown] : [unknown], 2014
ISBN	
ISSN	
OCLC	

No ISSN nor OCLC #

Copyright Clearance



This request has neither ISSN nor OCLC # for copyright matching.

Total uses


[Check for similar previously borrowed titles](#)




Check for similar previously borrowed titles

Select a Matching Journal ✕

Performance Improvement Quarterly 0 Create New Title

No results 

Title	ISSN	OCLC Number	Times Used	Action
No results 				

Close

Search WorldCat to find OCLC # or ISSN

Request Details (Request ID 169157986)

Source	PATRON
Status	Not Reviewed
Title / Journal	Performance Improvement Quarterly

Interlibrary Loan | Analytics | Admin

Tipasa® Home

Discover Items

Search

Scope: All WorldCat

Index: Title

Search: Expert Search = ti=performan

Advanced Search

Results 1 - 10 of 25

Sort by: Library Count (Highest First)

Term(s): ti=performance improvement quarterly


Search Clear

Expert search:
Title phrase = Performance improvement quarterly







Select title

Search: Expert Search = ti=Performance Improvement Quarterly (All WorldCat)

▶ Advanced Search

Results 1 - 10 of 24 

Sort by ▼


	<p>Performance improvement quarterly.</p> <p>by Florida State University; National Society for Performance and Instruction; International Society for Performance Improvement</p> <p> ePeriodical (digital), English</p> <p>Publisher: Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction</p> <p>ISSN#: 1937-8327 OCLC#: 60619000</p> <p>Search for versions with same title and author</p>	<p> Not Held by my library</p> <p>State Holdings</p> <p>Regional Holdings</p> <p>All Holdings (792)</p>
	<p>Performance improvement quarterly.</p> <p>by Florida State University; National Society for Performance and Instruction; International Society for Performance Improvement</p> <p> Periodical, English</p> <p>Publisher: Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction, c1988-</p> <p>ISSN#: 0898-5952 OCLC#: 17858576</p> <p>Search for versions with same title and author</p>	<p> Not Held by my library</p> <p>State Holdings</p> <p>Regional Holdings</p> <p>All Holdings (154)</p>

Apply data to request


Performance improvement quarterly. (17858576)

Performance improvement quarterly.

by [Florida State University](#); [National Society for Performance and Instruction](#); [International Society for Performance Improvement](#)

 Periodical, , English

Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction, c1988-

 **Not Held** by my library

[All Holdings \(156\)](#)

Description

Holdings

Find Related

Subject

OCLC Number:

17858576

Description:

Vol. 1, no. 1-; v. : ill. ; 23 cm.

ISSN:

0898-5952; 1937-8327

Apply data to request
173703487

Request now has ISSN & OCLC

✓ Bibliographic data applied to request 173703487

Send Request Change Fulfillment Type ▾ Cancel Request

Apply constant data: Actions: DEFAULT ▾ Mark as F

Source	PATRON
Status	Not Reviewed
Title / Journal	Performance improvement quarterly.
Uniform Title	
Author	Florida State University; National Society for Performance and Instruction; Int
Publisher	Tallahassee, FL : Learning Systems Institute, Florida State University in coop
ISBN	
ISSN	0898-5952; 1937-8327
OCLC	17858576
DOI	

[View Holdings](#)

Request now matches previously requested title

Copyright Clearance




Previously requested title matched.

Matched with

- Performance improvement quarterly
- ISSN: 08985952
- OCLC Number: 17858576
- Total uses: 1

Total uses

1 (1 of 1 pending fulfillment)

[Check for similar previously borrowed titles](#) 

Copyright Clearance

- Clear for Fair Use (CCG)
- Clear with fee payment required (CCG)

Other 

Cancel request and do not clear

Make copyright clearance selection

Copyright Clearance

✓ Previously requested title matched.

Matched with

- Performance improvement quarterly
- ISSN: 08985952
- OCLC Number: 17858576
- Total uses: 1

Matched on OCLC #
and ISSN

So far this year, used less than
5 times, so no payment required

Total uses 1 (1 of 1 pending fulfillment)

[Check for similar previously borrowed titles](#) ?

Copyright Clearance

- Clear for Fair Use (CCG)
- Clear with fee payment required (CCG)

Therefore, staff marks as
Clear for Fair Use (CCG)

Other ?

Cancel request and do not clear

Another title-matching example

Request Details (Request ID 171715172)


Source	PATRON
Status	Not Reviewed
Title / Journal	Art history
Uniform Title	
Author	
Publisher	[unknown] : [unknown], 2013
ISBN	
ISSN	0141-6790
OCLC	
DOI	10.1111/1467-8365.12028


ISSN in request


Title not used

Click to create new title in your library's Copyright Titles table

Copyright Clearance

 No previously borrowed journal matches found.

Total uses 

[Check for similar previously borrowed titles](#) 

Create new title


Select a Matching Journal ✕

Art history

0141-6790

0

Create New Title

No results 


Title

ISSN

OCLC Number

Times Used

Action

No results 

Close


Another title-matching example

Select a Matching Journal ✕


Journal of transportation engineering,

0

Create New Title

Results 1 - 1 of 1 

Title	ISSN	OCLC Number	Times Used	Action
Journal of transportation engineering	0733947X 19435436	8674831	2	Select as match

Results 1 - 1 of 1 

Potential match

Click to confirm match

Close

Use count 5+

Borrowing Requests: Copyright (2)

Batch actions to "Copyright" items [Mark As Fair Use](#) [Cancel Requests](#)

Export All

Pledged Copyright Payments Total **\$137.25** ?

Results 1 - 2 of 2

Rows 20

Used	ID	Media Type	Title	Patron	Date
3 (1 of 3 pending)	168468329		Performance improvement quarterly.	Jones, Nancy	10
7 (1 of 7 pending)	168467607		English journal.	James, Jordan	10

Results 1 - 2 of 2

When a title's use count is 5+, number has orange background

Copyright Clearance

Previously requested title matched.

Matched with

- Performance improvement quarterly
- ISSN: 08985952
- OCLC Number: 17858576
- Total uses: 6

Total uses

6 (1 of 6 pending fulfillment)

[Check for similar previously borrowed titles](#) ?

Copyright Clearance

- Clear for Fair Use (CCG)
- Clear with fee payment required (CCG)

Other

Cancel request and do not clear

Other copyright clearance options

Copyright Clearance

Clear for Fair Use (CCG)

Clear with fee payment required (CCG)

Other

Copyright Compliance

CCG: Conforms to CONTU Guidelines

CCL: Conforms to U.S. Copyright Law

None

Cancel request and do not clear

CCL

Copyright clearance
accordion for copy
requests with issue
date more than 5
years ago

(not included in use
count)

Performance improvement quarterly.

Send Request Save For Review

Apply constant data: Actions: COPY Reset

Request Tags	Choose...
Type	Copy
Format	Periodical/Article
Language	English (eng)
Edition	
Article Title	Going beyond Competencies: An Exploratory Study in Defining Exemplary Workplace Learning and Performance Practitioners
Article Author	Terri Freeman Smith
Volume	22
Issue/No	1
Issue Date	2009
Pages	27-51
Need Before	09/16/2009
Verification	WorldCat (17858576) Physical Description: v. : ill. ; 23 cm.

Copyright Clearance

Titles published more than 5 years ago do not require copyright clearance.

Copyright counts updated automatically

If you change copyright compliance, counts automatically update (in copyright queue and individual requests)

Borrowing Requests: Copyright (4)

Batch actions to "Copyright" items [Mark As Fair Use](#) [Cancel Requests](#)

Export All

Pledged Copyright Payments Total **\$41.50**

Results 1 - 4 of 4

Rows 20

Used	ID	Media Type	Title	Patron	Date Requested	Need Before
?	169222828		Journal of industrial engineering international	James Jordan	08/03/2010	09/02/2010
6 (4 of 6 pending)	169156388		Performance improvement quarterly		08/02/2010	09/02/2010

Copyright Clearance



Previously requested title matched.

Matched with

- Performance improvement quarterly
- ISSN: 08985952
- OCLC Number: 17858576
- Total uses: 6

Total uses

6 (4 of 6 pending fulfillment)

Copyright Titles

Includes both filled and unfilled requests marked CCG, “CCG with fee payment required”, or “other”

Interlibrary Loan Admin

Tipasa® Home

TPU Reg ID: 38998

Manage Copyright: Copyright Titles

Request Date: 2017 Show: All

results 1 - 6 of 6

Export

Rows 10

Copyright Title	LC Number	Fair Use	Will Pay	Other	Total	Fees	Action
American anthropologist	0002-7294; 1548-1433	1479294	1	0	0	1	\$0.00 View
Dictionary of American biography		796804	1	0	0	1	\$0.00 View
English journal	0013-8274; 2161-8895	1325886; 3536493	2	4	0	6	\$15.40 View
IEEE transactions on signal processing : a publication of the IEEE Signal Processing Society	1053-587X; 1941-0476	22582582	5	1	0	6	\$34.50 View
Journal of the American Chemical Society	0002-7863; 1943-2984; 1520-5126	1226990	1	0	0	1	\$0.00 View
Performance improvement quarterly	0898-5952; 1937-8327	17858576	5	2	0	7	\$83.00 View

Results 1 - 6 of 6

Rows 10

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (17)
- Manage Copyright**
 - Copyright Titles**
 - Copyright Fees Payable
 - Payment Batches

Copyright Titles: view details

Tipasa® Home

▶ Discover Items

▶ Find Patrons

▶ Borrowing Requests

▶ Document Delivery

▶ Lending Requests

▶ Purchasing Requests

▶ Off-System Requests

▶ Print Queue (17)

▼ Manage Copyright

Copyright Titles

✕ Performance improvement quarterly: 2017

Copyright Fees Payable

Payment Batches

TPU Reg ID: 38998

Manage Copyright: Title Usages

Title Performance improvement quarterly
ISSN 0898-5952; 1937-8327
OCLC Number 17858576

Copyright Fees Total **\$83.00** ?

Results 1 - 7 of 7

Rows 10 ▼

Request ID	Committed Date	Issue Date	Permission Type	Number of Pages	Fee	Batch Name	Action
169156232			Fair Use				Edit
173703617		2015	Fair Use	1			Edit
177879629		2014	Fair Use				Edit
177879709		2015	Fair Use				Edit
177879801		2013	Fair Use				Edit
177879925	05/15/2017	2015	Will Pay	20	\$41.50	Payments-2017-05-17	Edit
177927831		2014	Will Pay	23	\$41.50		Edit


Results 1 - 7 of 7

Rows 10 ▼

Copyright Titles: Edit copyright usage

Edit Copyright Usage

Request ID	177927831
Pages	59-81
Issue Date	<input type="text" value="2014"/>
Permission Type *	<input type="button" value="Will Pay"/> ▾ Fair Use Will Pay Other
Number of Pages *	<input type="button" value="Update"/>
Fee *	<input type="text" value="41.50"/> USD

[View copyright fees and permissions](#) 

Copyright Fees Payable

Only filled requests marked “CCG with fee payment required” which have not yet been added to a payment batch

Interlibrary Loan Admin

Tipasa® Home TPU Reg ID: 38998

Manage Copyright: Copyright Fees Payable

Create Payment Batch Copyright Fees Payable **\$41.50** ?

Results 1 - 1 of 1 Rows 10 ▼

Request ID	Title	ISSN	OCLC Number	Issue Date	Number of Pages	Fee
177927831	Performance improvement quarterly	0898-5952; 1937-8327	17858576	2014	23	\$41.50

Results 1 - 1 of 1 Rows 10 ▼

Manage Copyright

- Copyright Titles
- Copyright Fees Payable
- Payment Batches


Create payment batch

TPU Reg ID: 38998

Manage Copyright: Committed Payments


Create Payment Batch

Committed Copyright Payments Total **\$15.40** ?

Results 1 - 4 of 4 

Rows 10 ▼

Request ID	Title	ISSN	OCLC Number	Issue Date	Page Count	Amount
173779477	English journal	0013-8274; 2161-8895	1325886; 3536493	2015	7	\$3.85
173780377	English journal	0013-8274; 2161-8895	1325886; 3536493	05/01/2015	1	\$3.90
173781091	English journal	0013-8274; 2161-8895	1325886; 3536493	09/2014	1	\$3.80
173831569	English journal	0013-8274; 2161-8895	1325886; 3536493	November 2013	7	\$3.85

Results 1 - 4 of 4 

Rows 10 ▼

Export payment batch

Interlibrary Loan
OCLC WorldShare



Admin

TPU Reg ID: 38998

Manage Copyright: Payment Batches

Results 1 - 2 of 2

Rows 10

Batch Name	Created Date	Number Paid	Total Payment	Action
Payments-2017-02-24	02/24/2017	4	\$15.40	
Payments-2017-02-20	02/20/2017	4	\$137.25	

Results 1 - 2 of 2

Rows 10

Tipasa™ Home

Discover Items

Find Patrons

Borrowing Requests

Lending Requests

Purchasing Requests

Print Queue (4)

Manage Copyright

Copyright Titles

Copyright Fees Payable

Payment Batches

Export
as CSV

Payment batch formatted in Excel

REQUESTID	TITLE	ISSN	OCLCNUMBER	ISSUEDATE	PAGECOUNT	FEES	CURRENCY
173779477	English journal	0013-8274, 2161-8895	1325886, 3536493	2015	7	\$ 3.85	USD
173780377	English journal	0013-8274, 2161-8895	1325886, 3536493	5/1/2015	1	\$ 3.90	USD
173781091	English journal	0013-8274, 2161-8895	1325886, 3536493	Sep-14	1	\$ 3.80	USD
173831569	English journal	0013-8274, 2161-8895	1325886, 3536493	Nov-13	7	\$ 3.85	USD

Quiz & simulation tips

In most web browsers, you can

- Press **Ctrl** and **+** to make the display bigger
- Press **Ctrl** and **-** to make the display smaller

Simulation tips

If you're not sure what to do next, many simulation screens have a Hint button at the top

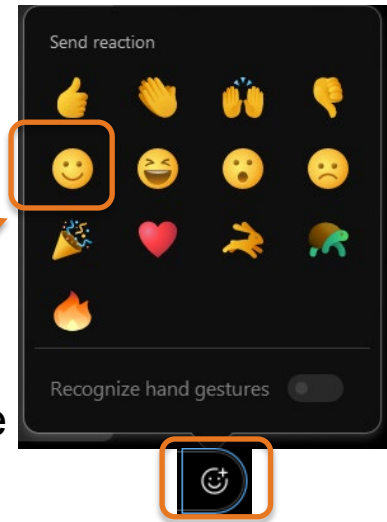
The screenshot displays the WorldShare Interlibrary Loan simulation interface. At the top, the title is "Simulation: Copyright Management". The WorldShare logo is on the left, and a prominent blue "Hint" button is on the right. Below the logo, there are tabs for "Interlibrary Loan" and "Admin". A left-hand navigation menu includes options like "Tipasa™ Home", "Discover Items", "Find Patrons", "Borrowing Requests" (expanded), "AE Alert (4)", "Copyright (3)", "Scientific American.", and "New For Review (4)". The main content area shows the request ID "175208485: Scientific American." and a green status message: "Bibliographic data applied to request 175208485". Action buttons include "Send Request", "Change Fulfillment Type", and "Cancel Request". A "Request Details" section is expanded, showing:

Source	PATRON
Status	Not Reviewed
Title / Journal	Scientific American.

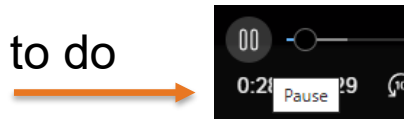
Additional UI elements include "Apply constant data: As" and a "DEFAULT" dropdown menu.

Simulation and quiz

- If you are participating in a live online class
 - See clickable links in Webex chat panel
 - When you have finished the simulation, please click the smile reaction from the bottom of the screen
 - If you finish early, also try the Quiz
 - To open chat panel, click the button at the bottom right of the screen



- If you are viewing a recording
 - Pause the recording (use button at bottom of screen) to do the simulation and quiz
 - See clickable links in Webex chat panel
 - To open the chat panel, click the button in the upper right corner



Proven senders enhancement

- Available since October 23, 2023
- Enable Proven Senders to automatically receive copy requests from **all** suppliers
- See [release notes](#) for more information

Advanced Workflows

Patron Settings

Address Book

Notifications

External System Settings

Proven Senders

Enable automatic processing of copy requests to mark as "Received" and send the content to the patron directly. On

Define your proven senders by creating a [Custom Holdings Group](#) in your ILL configuration.

Note: Please enable the [Borrowing Library > Patron Article Available in Article Exchange notification](#) for automated sending.

Include only this Custom Holdings Group

Custom Holdings Group:

- Select an Option
- Include ALL Lenders
- Include only this Custom Holdings Group
- Exclude only this Custom Holdings Group (All other lenders are proven senders)

Documentation and training



Or directly at

https://help.oclc.org/Resource_Sharing/Tipasa

A screenshot of the OCLC Tipasa help page. The page has a blue header with the OCLC logo and navigation links: 'System Status Dashboard', 'Contact OCLC Support', and 'Tell us'. Below the header is a search bar with the text 'How can we help you?'. The main content area is titled 'Tipasa' and includes a 'Last updated: Feb 2, 2018' date. Below the title is a paragraph: 'Tipasa provides new functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users.' There are four main content blocks: 1. 'Get started' with a sub-section 'Get started with Tipasa' and links for 'Contact OCLC Order Services' and 'Create a Tipasa account'. 2. 'Article Exchange' with a sub-section 'Article Exchange' and a paragraph: 'This guide provides an overview of product features and related technologies. In addition, it contains recommendations on best practices, tutorials for getting started, and troubleshooting tips for common situations.' 3. 'Print' with a sub-section 'Print' and a paragraph: 'With Tipasa, you can print individual requests, all requests in a queue, add requests to the print queue to print out later, and queue book straps and shipping and return labels to be printed.' Below this are four links: 'Print requests', 'Printing for Borrowers', 'Printing for Document Delivery Requests', and 'Printing for Lenders'. 4. 'Tags' with a sub-section 'Tags' and a paragraph: 'Tags are custom labels that can be applied to active requests. Your library can use tags as a way to group and keep track of requests. Tags are only visible to your library. The system maintains all tags created and saved to a request, and you can search for active and closed requests using tags. You can create up to 100 unique tags.' Below this are two links: 'Manage Tags' and 'View Tags'. At the bottom right, there is a section for 'WorldShare Circulation Integration' with a sub-section 'WorldShare Circulation Integration' and a paragraph: 'Tipasa and WorldShare Circulation integration provides you with a method to streamline the inter-library loan-circulation process and'. The OCLC logo is at the bottom left.

Community Center

- Discussions with Tipasa users in other institutions
- News and events
- Search enhancement requests or contribute your own



A screenshot of the OCLC Community Center website. The top navigation bar includes "OCLC", "Support", "Research", "Community", "Developer", and "WebJunction". Below this is a secondary navigation bar with "Community", "Welcome", "Product Communities", "Knowledge Communities", "Events", "Recordings", and "Ideas". The main content area has a green background with a circuit pattern and the word "Tipasa" in large white text. Below "Tipasa" is a search bar with a dropdown menu set to "All community" and a search icon. At the bottom, a breadcrumb trail reads "OCLC Community Center > Product Communities > Tipasa".

Thank You!

When you exit from WebEx, you will automatically be directed to an evaluation form:

- **Instructor:** Rick Newell
- **Class name:** Copyright Management

Training questions (what's covered in a class, etc.)?

Contact Rick Newell

newellr@oclc.org or 1.800.848.5878