Keeping the Lions at Bay:
Managing and Strengthening Institutional Copyright through Course Reserves

Jeff Carter, Brian Cassidy and Joshua Dickison

APLA 2018
Who are We?
Jeff Carter
Manager, Systems Group
jjc@unb.ca
- 2 main campuses +
- 4 locations + Law
- 10,000 students
- 75 UG/GR programs
- 3000 staff and faculty
- 1,400 courses/term

- 2,400 students
- 30 UG programs
- 400 staff and faculty
- 200 courses/term
How Did We Get Here?
Electronic Reserves Delivery: early days

Pre-2009

Very few specialized courses took advantage of server space hosted by UNB Libraries Electronic Text Center. Links were provided to instructors and students but often no login credentials were required for access.

A few surveys were taken to determine the usefulness of electronic delivery of Reserve materials: Fall of 2008 showed that 26% of all print materials were available online (licensed or open).
Electronic Reserves Delivery: early days

- June 17, 2009 the eReserves working group confirmed 3 courses were participating in a ‘pilot’ project to deliver electronic Course Reserves.
- Expanded the pilot to seven courses in Fall of 2009
Student Survey - 2009

Post pilot student survey showed overwhelming support for a transition to electronic based Reserve service that would provide access to materials any time, anywhere.
Electronic Reserves Delivery: first attempt

Copyright Clearance

2010 - Spreadsheets, Fax machines and telephones...

$719.19 copyright clearance cost.

This can serve an important role in our Copyright Compliance strategy!

We can do this!
Electronic Reserves Delivery : all in


$12,559.35 copyright clearance cost.

Access Copyright licensing model changes, course pack use and licensed resources

We can still do this! (but we need a few things...)
What We Needed

**Reserves:**
- Section level course information
- Manage changes to enrollment
- Serve both physical and electronic items
- Integration with catalogue
- Adaptable to established Reserves services

**Copyright Clearance:**
- Manage records (transactional license terms)
- Fair dealing escalation tool
- Mitigate risk within fair dealing assessment (distribution and removal)
We set out to build the system that Josh et al envisioned.
Foundation: the Course Section

2018/WI HIST*3925*FR01B

These 22 characters invoke and trigger a landslide of data - when, where, instructor(s), enrolment, content, etc.
How do we acquire and manage all this data, you ask?
Acquire: UNB ITS provides a constant stream of data from the registrar through Colleague and the LMS. They are the fire hose.
Automation, Automation, Automation!

Manage: Developers are inherently lazy.
Key Data

- **UNB Colleague** - course, section, instructor(s) nightly import
- **UNB LDAP** - LDAP profiles updated nightly (not stored in reserves)
- LDAP/Colleague translation bits
- **STU** - manual course/section creation (ONLY physical reserves)
- **Content**... oh yeah... we have content too!
Authentication and Access Control

It’s Not Rocket Surgery
LDAP authentication
(UNB-managed)

+ LDAP user course profiles
(Registrar-managed)

+ Reserves (Auth module & content DB)
(Systems and Reserves admin-managed)

= Granular Access Control

[ LDAP course entries - 45 days before | 30 days after ]
Who Gets in?

Reserves profiles:

- **Reserves admin** - super admins, admins, liaisons, edit temp records
- **Faculty/instructors** (+ teaching assistants)
- **Students** (of course!)
- **Anonymous**
What We Share

1. **Electronic content** (theoretically any format - pdf, doc, xls, jpg, mov)
   - Prof notes, exams and syllabus
   - UNB licensed resources
   - Free, open source
   - Fair dealing material
   - Copyright cleared/paid resources

2. **Physical Reserve items** (inc. real-time availability)
   - Books, textbooks, videos, maps, kits, CDs, etc.
~ Anywhere Anytime Availability ~
Student Demo
https://lib.unb.ca
D2L Brightspace Integration
Self-Serve for Faculty
Reserves Quick Search

Search: Search by instructor, course name or course number.

Course Semester: Summer 2018

Submit

Welcome, Brian

Logout
My Reserves / Dashboard
Quick Search

last login: Jun 5th, 2018

Instructor Dashboard

- View my courses/sections
- Add new reserves items to a course
- CLONE a course I’ve taught before
- JOIN a cross-listed course or combine identical sections
- Get help / Ask questions
Instructor Dashboard

View my courses/sections

If a course you are teaching does not appear, please contact Reserves staff.

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/SM - FAKE 4321</td>
<td>Fake News is (not) Real FRE01</td>
<td>View Reserves</td>
</tr>
<tr>
<td>* 2018/WI - FAKE 1234</td>
<td>Fake News is Real FRE01</td>
<td>View Reserves</td>
</tr>
</tbody>
</table>

* Section is no longer editable.

Add new reserves items to a course

CLONE a course I’ve taught before

JOIN a cross-listed course or combine identical sections

Get help / Ask questions
Course Reading List

Fake News
Irina Khalidrova; Mervi Pantti
Journalism practice, 2016, 10/7, 891-901

For Shame
Jeff Carter
New York Post, 2018, 1/2, 200-300

The Daily Show and Philosophy: Moments of Zen in the Art of Fake News.
Holt, Jason
John Wiley & Sons, 2009
PN1992.77 .D28 D35 2007  HIL-STACKS  Main Collection
There are no reserves under this heading.
Instructor Dashboard

- View my courses/sections

- Add new reserves items to a course
  
  If a course you are teaching does not appear, please contact Reserves staff.

  - 2018/SM - FAKE 4321 - Fake News is (not) Real FRE01

- CLONE a course I've taught before

- JOIN a cross-listed course or combine identical sections

- Get help / Ask questions
Create New Temporary Record

ISBN/ISSN  
Scan or enter ISBN/ISSN to fetch bibliographic data

Auto-fill Data  Complete Manually

Item Heading  
please select one ...

Add New Heading | Manage Headings

Additional Information  
If required

Date Required By

Optional

Providing the URL of the article or ebook, uploading a digital copy or dropping off the physical item, can help expedite your request.

We may not use your copy, if we have more appropriate access.

Option 1: Upload a document

Option 2: Link to a document

Option 3: Use a physical resource

Submit  Submit and Add Another
Create New Temporary Record

ISBN/ISSN: 9780470257180

Title of Chapter or Article: Leave blank if not applicable.

Title of Book or Journal: Trump never give up: how I turned my biggest challenges into success

Author: Trump, Donald, 1946-

Publisher: John Wiley & Sons

Publication Year: 2008

Volume/Issue: 

Pages Requested: 

Reserves Record Details: Not publicly displayed.
Optional

Providing the URL of the article or ebook, uploading a digital copy or dropping off the physical item, can help expedite your request. We may not use your copy, if we have more appropriate access.

Option 1: Upload a document

Option 2: Link to a document

Option 3: Use a physical resource

Loan Type: 2 hour / use in library only (SJ and HIL only)

Call Number: Existing catalogue item

I am bringing in my copy.

Submit  Submit and Add Another
Optional

Providing the URL of the article or ebook, uploading a digital copy or dropping off the physical item, can help expedite your request. We may not use your copy, if we have more appropriate access.

Option 1: Upload a document

Option 2: Link to a document

Item URL/DOI

Option 3: Use a physical resource
Optional

Providing the URL of the article or ebook, uploading a digital copy or dropping off the physical item, can help expedite your request. We may not use your copy, if we have more appropriate access.

Option 1: Upload a document

The Libraries will make every effort to include any materials requested. To ensure quick access, we recommend scanned documents follow the UNB fair dealing guidelines, which are limited to one article, one chapter of a monograph, or no more than 10% of an entire publication. For more information, please see Manage Course Reserves or contact the UNB Libraries Copyright Office.

Upload

Choose File... C:\fakepath\test.pdf

Option 2: Link to a document

Option 3: Use a physical resource
FAKE 4321 - Fake News is (not) Real (Views: 8)
2018/SM FAKE*4321*FRE01
Brian Cassidy

Trump never give up: how I turned my biggest challenges into success
(Unassigned)
Trump, Donald, 1946-
John Wiley & Sons, 2008

My Example Book (Unassigned)
Brian Cassidy
Create New Item Heading

Item heading title

Collapsed by default

Start date

End date

Showing and hiding headings:
- Leave both fields blank to always show
- Specify the start date to delay visibility of items
- Specify the end date to hide items after the specified date

Submit  Cancel
Instructor Dashboard

- View my courses/sections
- Add new reserves items to a course
- CLONE a course I've taught before

- Headings and items below will be copied from the Source to the Target section.
- Existing headings and items in the target section will NOT be overwritten.
- Copyright status of any copied electronic items will be reset and require review.
- Please review all items to ensure correct locations, confirm links, and reaffirm copyright compliance.
- Most electronic copies are deleted after each term and may require replacement.
- You will be redirected to the target section following successful cloning.

From Source Section:

2018/WI - FAKE 1234 - Fake News is Real FRE01 (3 records)

To Target Section:

2018/SM - FAKE 4321 - Fake News is (not) Real FRE01 (0 records)

Clone

- JOIN a cross-listed course or combine identical sections
- Get help / Ask questions
Section Cloning

The items below will be copied/cloned from **2018/WI - FAKE 1234 - Fake News is Real FRE01 (3 records)** to **2018/SM - FAKE 4321 - Fake News is (not) Real FRE01 (0 records)**. Existing items in the target course/section will **NOT** be over-written.

*You will be redirected to the target section following successful cloning.*

**Caution:** The target section already contains records. Please ensure you are not duplicating items.

**Course Reading List**

- 📚 Fake News
- 📚 For Shame
- 📚 The Daily Show and Philosophy: Moments of Zen in the Art of Fake News.
FAKE 4321 - Fake News is (not) Real (Views: 9)
2018/SM FAKE*4321*FRS1
Brian Cassidy

READING

Trump never give up : how I turned my biggest challenges into success
(assigned)
Trump, Donald, 1946-
John Wiley & Sons, 2008

My Example Book (Unassigned)
Brian Cassidy

COURSE READING LIST

Fake News (Unassigned)
Irina Khalidova; Mervi Pantti
Journalism practice, 2016, 10/7, 891-901

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Jeff Carter
New York Post, 2018, 1/2, 200-300

The Daily Show and Philosophy : Moments of Zen in the Art of Fake News
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Instructor Dashboard

- View my courses/sections
- Add new reserves items to a course
- CLONE a course I've taught before
- JOIN a cross-listed course or combine identical sections

Joining or cross-listing is intended to join identical course sections you are teaching, i.e. FR01A and FR01B or identical courses listed in more than one discipline, i.e. FILM2909 and ENGL2909, during the same semester. One section will be the parent/master and all cross listed sections will have the same course reserves.

Parent Section

2018/SM - FAKE 4321 - Fake News is (not) Real FRE01

Child Sections

- 2018/SM - FAKE 4321 - Fake News is (not) Real FRE01

Mark as cross-listed

Get help / Ask questions
Instructor Dashboard

- View my courses/sections
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- JOIN a cross-listed course or combine identical sections

Get help / Ask questions

Contacts:
- Reserves Help - reserves@unb.ca or call (506) 447-3378
- Liaison Librarian regarding course content

Instructional Videos:
- Course Reserves Basics
- Adding Content & Manage Course Reserves
- How to Clone Course Reserves

More information:
- Course Reserves
- UNB's Copyright Guidelines
Workflows and Management
Staffing

System and workflow was created to provide a transition from established Reserve service to a fairly automated electronic delivery system.

Provide all levels of support from syllabus drop-off to instructor self-submit.
### Course Sections That Require Attention

The item total reflects the number of records not yet completed. They may be physical, electronic or temporary records.

<table>
<thead>
<tr>
<th>Section</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED 5035 - Inclusionary Practices FR01B</td>
<td>2</td>
</tr>
<tr>
<td>ED 3043 - First Nations Education FR01</td>
<td>1</td>
</tr>
<tr>
<td>ED 6163 - Educational Gerontology FRE1D</td>
<td>2</td>
</tr>
<tr>
<td>SOCI 3634 - Violence Against Women FRL</td>
<td>1</td>
</tr>
<tr>
<td>POLS 3413 - European Union &amp; Europe STUA</td>
<td>4</td>
</tr>
<tr>
<td>POLS 1103 - Canadian Government STUC</td>
<td>1</td>
</tr>
<tr>
<td>POLS 2303 - Comparative Politics Developed World STUA</td>
<td>1</td>
</tr>
</tbody>
</table>

### Current Assignments

Below is a listing of Reserves admins and all their current assignments.

The item total reflects the number of records not yet completed. They may be physical, electronic or temporary records.

#### gfinney (2)

<table>
<thead>
<tr>
<th>Section</th>
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<tbody>
<tr>
<td>ED 3043 - First Nations Education FR01</td>
<td>1</td>
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<td>SOCI 3634 - Violence Against Women FRL</td>
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</tbody>
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#### Ibanks (6)

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</tr>
<tr>
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<td>1</td>
</tr>
</tbody>
</table>

#### sallen (4)
Note: Copyright statuses are updated every 15 minutes.

Ongoing Requests

- ED 6115: Constructive Storytelling: A Peace Process (FB 6405)
- ED 3043: The timelessness of oral traditions (FB 6758)
- ED 3114: Workplaces as Sites for Social Imaginaries: Nation Building through Language Assessment Policy (FB 6822)
- SOCI 3634: Civil protective order effectiveness: Justice or just a piece of paper (FB 6840)

Recently Cleared Items

- ED 6108: No Title Provided (FB 6304)
- ENGL 1103: The Importance of Rivers (FB 6300)
- ENGL 1103: Colonialism Lived (FB 6301)
- ENGL 1103: Echo (FB 6302)
- ED 6108: Linguistic, Religious, and Socio-Economic Diversity and Schools (FB 6306)
- ED 6108: Checklist for the analysis of culturally inclusive instructional material (FB 6316)
- ED 6071: Existential theory and therapy (FB 6320)
- ED 6071: Family systems theory and therapy (FB 6321)
- HIST 3925: Community in the Network Society (FB 6341)
- MBA 7102: The Social Responsibility of Business is to Increase its Profits (FB 6342)
- MBA 7102: The Social Responsibility of Business is to Increase its Profits (FB 6343)
- ANTH 2114: The Domestic Mode of Production: The Structure of Underproduction (FB 6363)
- FOR 2803: No Title Provided (FB 6347)
Initiates Copyright Clearance Request

Copyright Statement
- The instructor is the creator of this material
- These materials do not infringe on copyright
  - Fair Dealing
  - Open Resource
  - Public Domain
- The materials copied here have been cleared of copyright from the rights holder
- The materials copied are pending copyright clearance from the rights holder
- These materials require copyright clearance review.
- Copyright has expired
- Copyright was denied

Limit access to
- UNB with section enrolment
- UNB
- No limit (Open Access, free, etc.)

Upload
Choose File...
Currently: gw2015-thakor.pdf
OR Search for an existing file
Copyright Clearance
<table>
<thead>
<tr>
<th>Case</th>
<th>Title</th>
<th>Status</th>
</tr>
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<tbody>
<tr>
<td>6840</td>
<td>SOCI3634: Civil protective order effectiveness: Justice or just a piece of paper</td>
<td>Open</td>
</tr>
<tr>
<td>6758</td>
<td>ED3040: The timelessness of oral traditions</td>
<td>Open</td>
</tr>
<tr>
<td>6886</td>
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**OPEN**

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</table>

**PENDING**

<table>
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<tr>
<th>Case</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>6420</td>
<td>SOCI2533: Everyone is a Media Outlet</td>
<td>Pending</td>
</tr>
<tr>
<td>6421</td>
<td>SOCI2533: Publish, Then Filter</td>
<td>Pending</td>
</tr>
</tbody>
</table>

**PENDING - REQUIRES PAYMENT**

<table>
<thead>
<tr>
<th>Case</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>6400</td>
<td>ED6108: Utilizing the Concept of Pathway as a Framework for Indigenous Research</td>
<td>Pending - Requires Payment</td>
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</tbody>
</table>

**RESOLVED - DENIED**

<table>
<thead>
<tr>
<th>Case</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>6406</td>
<td>ED6115: HUMAN RIGHTS, EDUCATION AND INTERCULTURALISM: PEDAGOGICAL PRACTICES FOR PEACE BUILDING...</td>
<td>Resolved - Denied</td>
</tr>
</tbody>
</table>

**RESOLVED - FAIR DEALING**

<table>
<thead>
<tr>
<th>Case</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>6343</td>
<td>MBA7102: The Social Responsibility of Business is to Increase its Profits</td>
<td>Resolved - Fair Dealing</td>
</tr>
<tr>
<td>6444</td>
<td>ANTH4202: The Intangibility of the Yasuni</td>
<td>Resolved - Fair Dealing</td>
</tr>
<tr>
<td>6020</td>
<td>ED 6105: Between Erdis and Chandra: Reflections on and problems associated with the evaluation of teachers in a</td>
<td>Resolved - Fair Dealing</td>
</tr>
</tbody>
</table>
Some Thanks!
Previous Contestants

Jamie MacKenzie - Reserves Committee Chair

Jason Nugent - Senior Developer

Kassim Machoudi - Web Developer

Leah Belyea - Web Developer

Jane Diduch - Reserves Admin

Steve Lelievre - Head, Engineering Library

Steve Rosenfeld - Director of Library Systems
Is It Working?
We Think So...

- **de facto** place for building managed course reading lists
- system **exceeds standards for fair dealing and copyright compliance**
- **feature rich**
- **technical costs** reasonable
  - developer time
  - minimal infrastructure
- **moderate** **licensing costs**
  - manageable and help acquisition spending
- **staffing** - **centralized** and **distributed**, fluid
6000

reserve items
1000 courses vetted for content
50,000 section views
3000

Physical items
What Keeps Us Awake at Night?
- WorldCat integration
- publisher integration
- EBM or dynamic course pack production
- technical debt - for v. 2.0
- audits & outliers

- ….and sometimes Copyright!
Your Opinion Matters
Thank You

Jeff
jjc@unb.ca

Brian
j333f@unb.ca

Josh
jjd@unb.ca