

Forward/Introduction

- It is the library's responsibility to decide what to digitize and provide access to
 - This document does not represent legal advice
 - Consult with your institutional legal counsel as needed
 - Draft a copyright statement and agree on placement
 - True CDL is a 1:1 match of digital access to the number of items the library owns. Providing access to instructor-owned (rather than library-owned) copies may fall outside of a strict interpretation.
- Follow applicable copyright laws and guidelines

Digitization

- Consideration for whether to purchase or digitize
 - Cost of labor vs. cost of ebook purchase, remember to weigh number of physical copies and simultaneous users
 - Hardware and software costs
 - Staffing levels and workflow impacts of the digitization process
 - File size and network storage capacity, including Alma Digital (Alliance institutions have access and use of Alma Digital, for up to one TB of storage. For every additional 1 TB of cloud storage OVER 1 TB, the Alliance institutions will pay an additional \$1,850 per year, up to a total of five (5) TB; for any data beyond five (5) TB, the annual subscription price will be \$1,000 per TB.)
- Create a consistent file-naming structure and folder hierarchy in your storage location
- Accessibility
 - This source supplies information on [creating \(or remediating\) PDFs for maximum accessibility](#).
 - Scan at high dpi and zoomed for clarity
 - Be sure to enable OCR

Creating a Collection

- Alma Digital works natively through the use of their Collection feature. Creating a collection is asked for in the very first step of adding a digital representation. Circulation and Reserve operators may not have this access so they may need to ask to have the collection created.
 - The Ex Libris Knowledge Center has [instructions on Managing Collections in Alma](#).
 - Remember that your institution must also make a couple of adjustments in Primo VE for users to find the collection itself and the representations. The representations should be visible in course reserves without these steps.
 - Select "Enable Collection Discovery Features" in the View Configuration, General tab.

[View Configuration](#)

General Links Menu Search Profile Slots Advanced Search Configuration

Manage Customization Package

Define View

Code * 01ALLIANCE_PU:PU

Description

General Attributes

Time-out URL http://alliance-primo.hosted.exlibrisgroup.com/ Time

Timeout (in minutes) for signed in users * 30

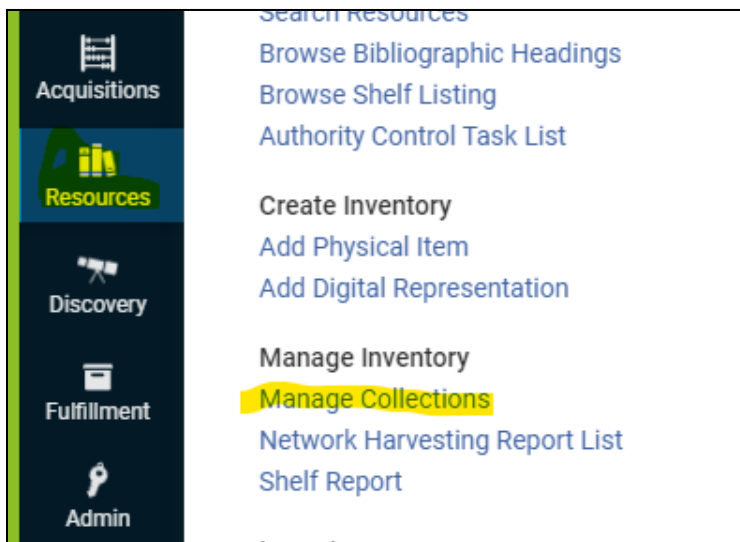
Side bar (Tweak my results) position On the left Au

Select as Default View ☒ En

[Enable Collection Discovery Features](#) ☐ Re

Highlight reference entry on top ☐

- Create a scope for Digital by creating a [Custom Local Data Scope](#) and adding it to the **My Institution** search profile
- Discuss organization and tracking for this collection with your stakeholders, including:
 - Timeframe
 - Usage and demand
 - Tracking of Alma Digital representations, as they don't have location and call number information inside their records
- **How to create a collection in Alma:**
 - In the Resources tab, select Manage Collections (under Manage Inventory).



- Then select Add Top-Level Collection near the top of the screen.
- In the “Add New Collection” screen, enter the title and name of the collection, which should be the same, and a useful description of the collection. Select the appropriate library from the list. Add a thumbnail photo to represent the collection (optional). Click Save and Continue.

- The General tab in the Collection will look something like this:

Creating the Access Rules in Alma

- Ex Libris has a [documentation page with definitions and suggestions for Access Rights](#).
- In order to create Access Rules, you will need the following roles: Collection Inventory Operator/Extended, Digital Inventory Operator/Extended

- **Note:** You will need to make sure you are using the NEW Alma Viewer to enable the waitlist functionality in the Access Rules. From the Configuration menu, select Fulfillment, then Viewer Services (under Discovery Interface Display Logic), and choose the Alma Viewer.

	Library Management	Digital Fulfillment	Resource Sharing	Discovery Interface Display
Alma Sandbox	Opening Hours	Digitization Departments	Workflow Profiles	Display Logic Rules
	Transit Time	Electronic Document Delivery Rules	Rota Assignment Rules	Related Records
	Reshelve Without Transit Rules	Delivery Profiles Metadata	Locate Profiles	Direct Linking
Acquisitions	SIP2 Bin Configuration	Alma Viewer Labels	Shipping Cost Lender Rules	General Electronic Services
	Locations	Viewer Share Buttons	Shipping Cost Borrower Rules	★ Viewer Services
Resources	Remote Storage	Courses	Sending Borrowing Request Rules	Online Services Order
		Processing Departments	Patron Query Types	General Electronic Services
	Physical Fulfillment	Academic Departments	Additional Requested Media	Locations Ordering Profile
Discovery	Fulfillment Units	Additional Reading List Citation	Requested Media Definition	Other Settings
	Terms of Use and Policies	Statuses	Levels of Service	Currency Symbols
	Block Preferences	Citation Processing Rules	Library Mapping	General
Fulfillment	Auto Loan Renewal Rules	Course Terms	Brief Audit Fields	Fulfillment Jobs Configuration
	Item Policy	Citation Attributes Types	Resource Languages	Other Settings
	Advanced Policy Configuration	Citation Attributes	Item Policy Exceptions	Printers
User Management	Overdue and Lost Loan Profile	Citation Attributes To Citation Attributes	Request Form Type by Genre	Article Form Mandatory Fields
	Loan Recalls Configuration	Types	Borrowing Requests Inactive Filters	Book Form Mandatory Fields
	Loan Status Name	Locate Citation by Fields	Borrowing Request Statuses	Copyright Management
General	Request Task Name	Tags	Automatic Locate Reject Reasons	

- Under Service details, make sure the Use New Viewer box is checked. Waitlist features are not available in the old Alma viewer.

[Service Details](#)

Service Details

Service Availability Rules

Customization

Active

Active

Service Code *

AlmaViewer

Service Name *

Alma Viewer

Service Description

Digital Version(s)

Hide Repeated Labels

☐

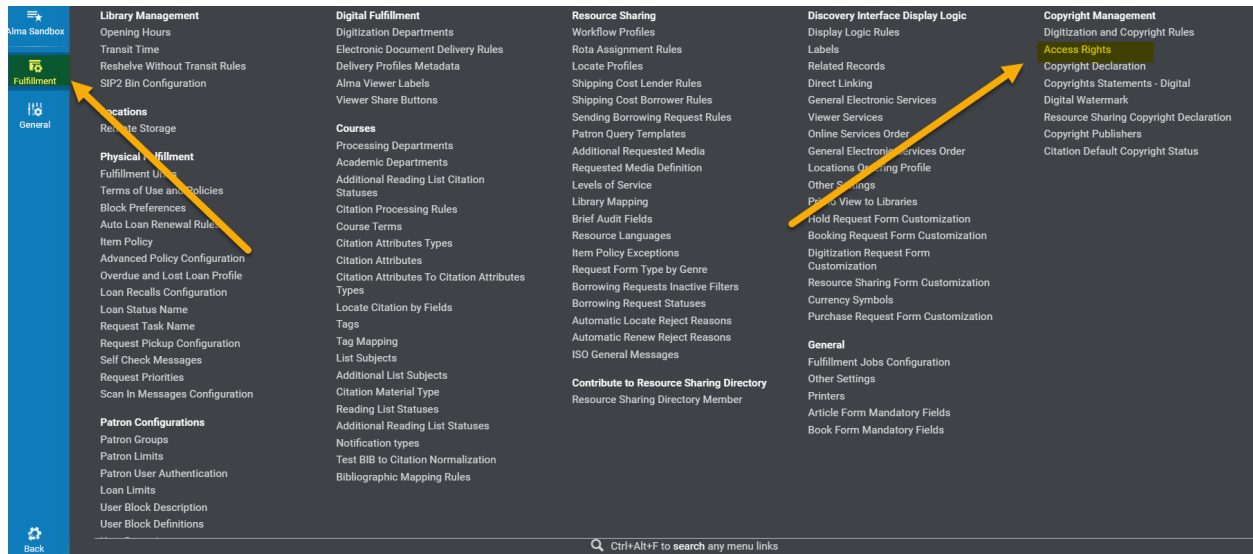
Use New Viewer

☒

Hide Fulltext

☒

- **How to add Access Rights in Alma:**
 - From the Configuration menu, select Fulfillment, then Access Rights (under Copyright Management).



- From the Configuration menu, select Fulfillment, then Access Rights (under Copyright Management).
- Select Add Access Rights.
- In the Access Rights Policy screen, enter the following information:
 - Name: Course Reserves Policy, or a different useful name
 - Copyrights: Select the appropriate copyright policy from the drop-down menu, such as “In copyright: Non-commercial use permitted.”
 - Description: A description of the purpose of the policy. For instance: Course Reserves CDL
 - Denied note: A note that the user will see when they are unable to access the material. It should describe how many users can view the material at a time. For example, “Only one user may view at a time. If you are signed in and unable to access this item, please try again or join the waitlist.”

Configuring: Oregon Health and Science University

Access Rights Rule

Cancel Save

Details

Name * Paul's Course Reserves access rule

Description Waitlist and Grace Period

Expressions

Add Parameter

Name	Operator	Value
1 Concurrent Users	Usage	1 users within 1 minutes

Waitlist Management

Manage Access Waitlist ☒

Grace Period (minutes) * 30

Limit Waitlist to Specific Hours ☐

From To Library hour format HH:mm (hour 00-23, minute 00-59)

Output

Allow View ☒

Allow Download ☒

- Under Waitlist Management, select Manage Access Waitlist.
- Enter a grace period based on your institution's need. This is the amount of time a user has to access the resource once it becomes available. You can also limit it to certain hours so that a user will not miss their chance to access the resource if it occurs in the middle of the night. For example, 07:30 to 23:59.
- If "Allow Download" is checked, a user will be able to download the CDL file.
- Click Save.
- You can repeat the same process to add a parameter that restricts the user groups who can access the resource. This will require users to sign in.
 - Add a rule with a name such as User Group Rule, and a Denied Note such as "This item is restricted to use by students. Please sign in to view."
 - Add a parameter and select User Groups from the drop-down menu.
 - Use the operator In List.
 - For the Value, choose the users who are allowed to access CDL materials.

[Access Rights Policy](#)

Details	
Name *	Bahram's Course Reserves Digital Lending
Copyrights	Public Domain Mark 1.0
Description	Accesss to Digital lending
Denied Note	Free to all undergrad
Denied Note (override for unregistered users)	This item is restricted to undergraduate use. Please sign in to view if you are an undergrad.

[Access Rights Rule](#)

[Back](#)

Details		
Name	OHSU CDL User Group rule	
Description	Permitted User groups	

Expressions		
Name	Operator	Value
1 User Group	In List	OHSU Affiliate Faculty, OHSU Alumni, OHSU Emeritus Faculty, OHSU Faculty, OHSU Resident/Fellow, OHSU Staff, OHSU Student, OHSU Unassigned, OHSU Volunteer, ONPRC Faculty/Staff, Visiting Faculty, Visiting Student

Output	
Allow View	Yes
Allow Download	Yes

Adding a Digital Representation

- To add the digital CDL text in Alma, do the following:
- From the Resources tab, select Add Digital Representation.
- Enter your collection name, such as Online Course Reserves.
- Enter the title of the resource.

Descriptive Information

☒ New ☐ Existing

Record Format: MARC21 Bibliographic

Placement of new record: ☒ Institution ☐ Network

Collection * PACFG - Robert's Brave New World of Digital Reserves

Title * The book with many chapters

Creator

Description

Type: Book

Suppress from Discovery ☐

- In Representation Details, enter Master for the usage type and select the appropriate library from the list.
- Enter the title of the resource as the label.
- Add the appropriate Access Rights Policy from the list.
- Do not check “Remote.”

Representation Details

Remote ☐

☒ Active ☐ Inactive

Usage Type * Master Library * Forest Grove

Label: Chapter 1: The Journey Begins

Auto-Generate Label

Note

Public Note

Access Rights Policy: Bahram's Course Reserves Copyrights

Entity Type

File Details

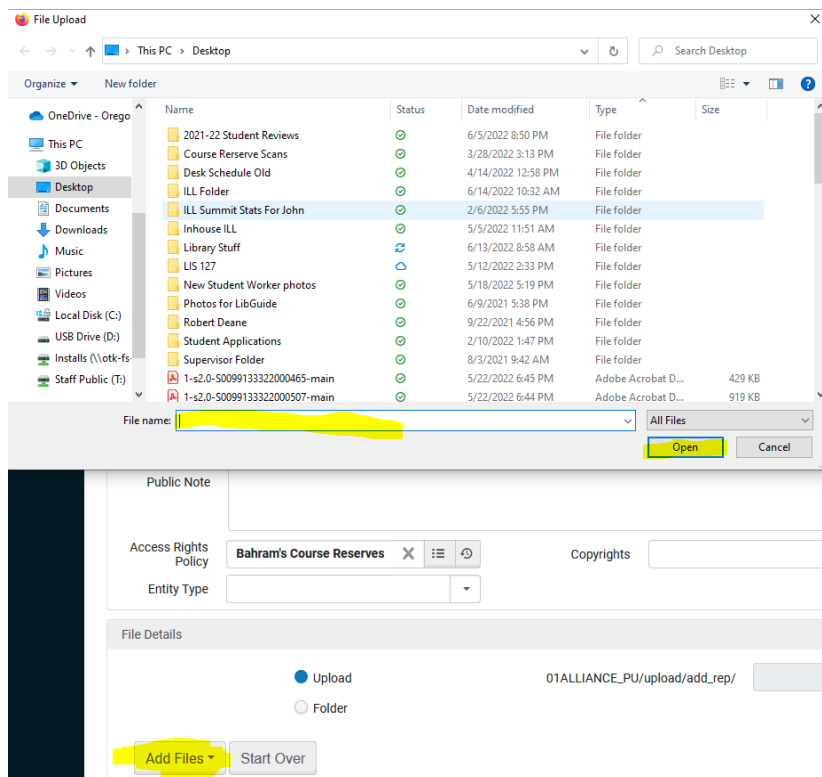
☒ Upload 01ALLIANCE_PU/upload/add_rep/

☐ Folder

Add Files Start Over

- Under File Details, select Add Files. This will open up a file folder from your computer. Select the file of your CDL resource.
- Click Open.
 - You can add multiple files; for example, one file for each chapter/section.
 - The label is what the user will see, and can be different from the file name. For example, “Introduction” or “Chapter 1.”

- Click Save.



Attaching the Resource to the Course Record

- The Alliance has a lot of existing [documentation for course reserves](#). A Course with a Reading List is required to add a CDL resource to course reserves.
- To add a course:
 - From the Fulfillment screen, select Courses.
 - Select Add Course.
 - Enter the course code and name, and select the processing department from the list.
 - Enter any other additional information for the course if you'd like.
 - Click Save.

RESERVES									
49	BIO 101	01S	Introduction to Biology	Forest Grove Reserves	Deane, Robert	Active	03/22/...	03/22/...	Spring

- To add a reading list to a course:
 - Click the ellipses on the right side of the course on the Courses screen and select Reading List.

- Select Add Reading List.
 - Enter the course code and name, and click Add and Close.
- To add the CDL resource to the reading list:
 - Select Work On from the ellipses menu on the right side of the reading list.
 - Select Add Citation, and then Add Repository Citation.

Code: *	CDL 101-01	Status:	Complete	▼
Name: *	How to connect a material to a course	Due Back Date:	06/10/2022	X Calendar
Commons License				

Title ▼

Alerts : ▼
 Citation Status : All ▼
 Resource Locate : All ▼
 Material Type : All ▼
 Tags : All

Citation Last Modification Date

- Use the top search bar to do an All Titles search for your CDL resource.
- Select the box to the left of the title and click Select.

All Titles

☐ Select All
 1 - 20 of 144

1	☒		Harry Dresden's Bold new digital adventures Book {Monographic component part - Electronic} (2022) Creation Date: 04/12/2022 10:55:51 PDT Modification Date: 04/12/2022 10:55:51 PDT	Language: English
Physical Electronic ● Digital (1) Collections (1) Other details				

- Select Set Complete next to the CDL title and change the status of the reading list to complete.
- Click Save.
- Select Release Assign from the reading list's ellipses menu to allow others at your institution to work on the reading list.

< Course's Reading List Back

1 - 1 of 1 All ▾ Q + Add Reading List 📄 ⚙️

▼ Status : All ▾

Code	Name	Status	Assignee	Owner/s	Due Back Date	
1 FSG 101	CDL For Course Reserves	Complete	Hiltebrand, Lori	-	06/30/2022	⋮

View
 Work On
 Release Assign
 Reassign
 Duplicate
 Associate this list with a course
 Remove associated course

Testing Access

*You will need to enable the New Alma viewer to utilize the waitlist
 In Primo VE, the link doesn't appear/isn't clickable if you're not in the selected access group.

View Online

Additional services may be available if you sign in [Sign in](#)

Digital Version(s) Availability
 Showing 1 of 1 results

Digital Version(s)
 The legal environment of business : text and cases
 36 file/s (pdf)

🔒 Simultaneous users: 1
 Time limit: 1 hour (renewable)
 (REQUIRES ONID LOGIN)

Sign in and click link above to view resource or join waitlist.

OSU's message that appears when access is denied in Primo:

Access Rights

You do not have permission to view this object



You must be signed in to 1Search/your library account. If you are signed in and see this message, then all copies are currently in use. Please click the link above to add yourself to the waitlist.

Waitlist configuration

Handling/control of physical copies while items are available digitally

Alma Analytics for Digitized Resources

Deletion/Removal of Digitized Resources

- If the physical copy of the item needs to be returned to an instructor at the end of the term, the digital copy needs to be removed
- If the course is not being taught, but the physical copy belongs to the library and is still controlled, access can still be made available through the library catalog outside of reserves.

Additional Resources

- [A White Paper on Controlled Digital Lending of Library Books](#) - David R. Hansen & Kyle K. Courtney