Forward/Introduction

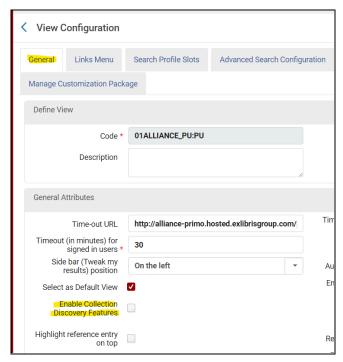
- It is the library's responsibility to decide what to digitize and provide access to
 - This document does not represent legal advice
 - Consult with your institutional legal counsel as needed
 - Draft a copyright statement and agree on placement
 - True CDL is a 1:1 match of digital access to the number 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

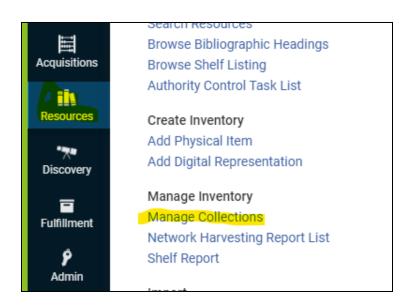
- Consideration for whether to purchase or digitize
 - Cost of labor vs. cost of ebook purchase, remember to weigh number of physical copies and simultaneous users
 - Hardware and software costs
 - Staffing levels and workflow impacts of the digitization process
 - File size and network storage capacity, 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 <u>creating (or remediating) PDFs for maximum</u> accessibility.
 - Scan at high dpi and zoomed for clarity
 - Be sure to enable OCR

Creating a Collection

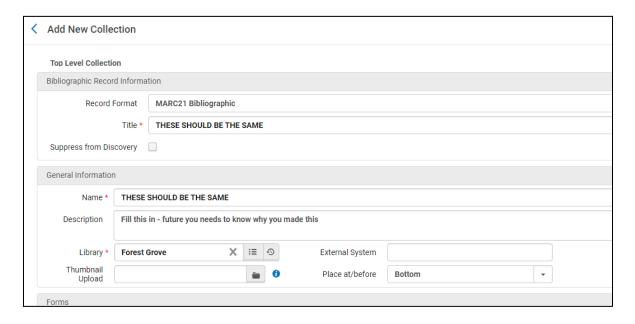
- Alma Digital works natively through the use of their Collection feature. Creating a
 collection is asked for in the very first step of adding a digital representation. Circulation
 and Reserve operators may not have this access so they may need to ask to have the
 collection created.
 - The Ex Libris Knowledge Center has <u>instructions on Managing Collections in</u> 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.



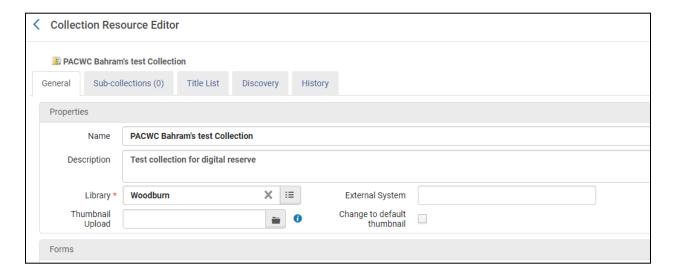
- Create a scope for Digital by creating a <u>Custom Local Data Scope</u> and adding it to the **My Institution** search profile
- Discuss organization and tracking for this collection with your stakeholders, including:
 - Timeframe
 - Usage and demand
 - Tracking of Alma Digital representations, as they don't have location and call number information inside their records
- How to create a collection in Alma:
 - o 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.



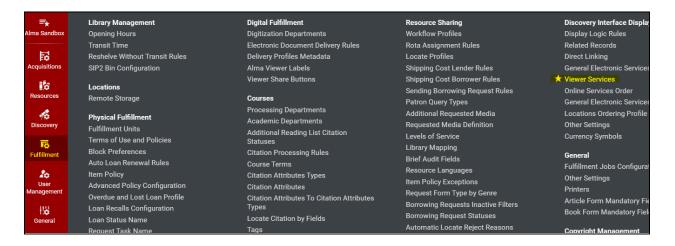
The General tab in the Collection will look something like this:



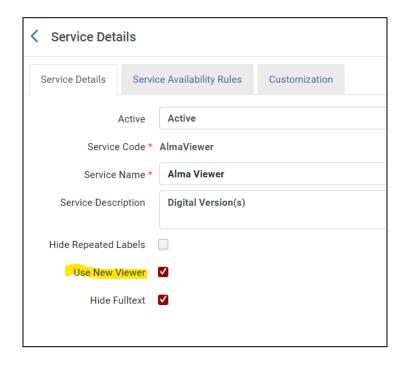
Creating the Access Rules in Alma

- 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.



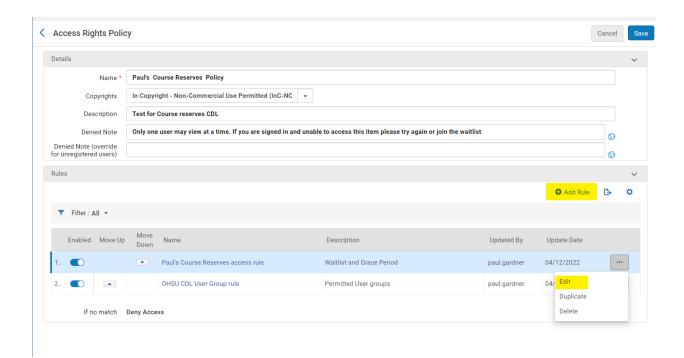
 Under Service details, make sure the Use New Viewer box is checked. Waitlist features are not available in the old Alma viewer.



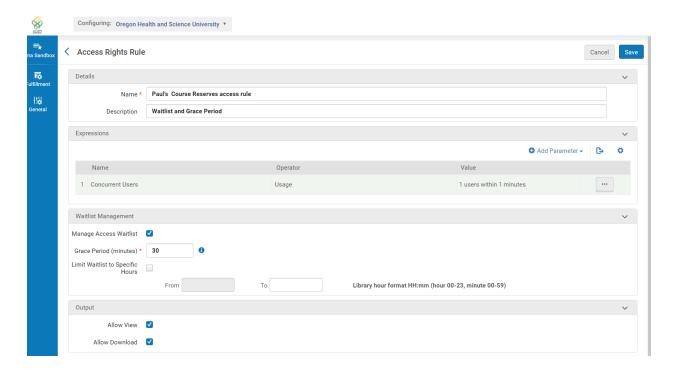
- How to add Access Rights in Alma:
 - From the Configuration menu, select Fulfillment, then Access Rights (under Copyright Management).



- 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."

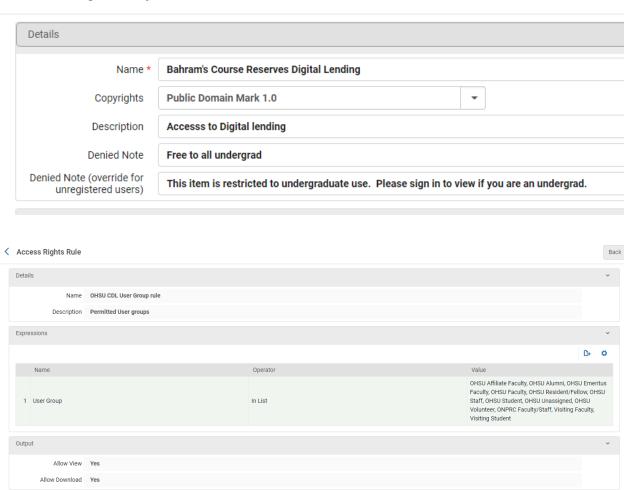


- Next, add the rule(s) that will make up your access rights policy.
 - Select Add Rule.
 - Enter a name, such as "Course Reserves Access Rule."
 - Enter a description of the purpose of the rule, such as "Waitlist and Grace Period."
 - Select Add Parameter.
 - Select Concurrent Users from the drop-down menu to create a parameter for the number of people who can use the resources at a time.
 - Choose a number of users you wish to be allowed to use the resource within a given number of minutes. This determines the length of time the copy can be viewed. For example, one user can use it for 60 minutes.



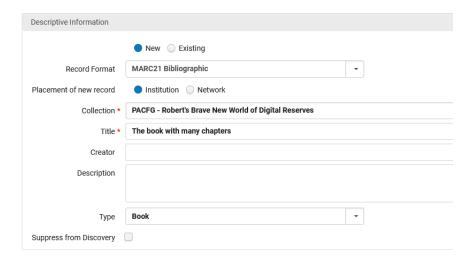
- Under Waitlist Management, select Manage Access Waitlist.
- Enter a grace period based on your institution's need. This is the amount of time a user has to access the resource once it becomes available. You can also limit it to certain hours so that a user will not miss their chance to access the resource 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

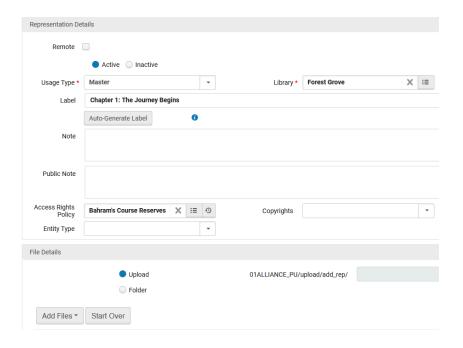


Adding a Digital Representation

- 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.

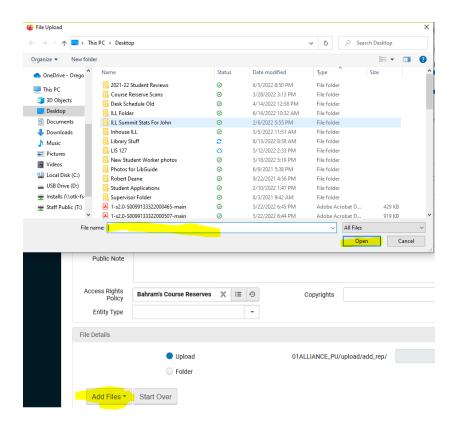


- In Representation Details, enter Master for the usage type and select the appropriate library from the list.
- Enter the title of the resource as the label.
- Add the appropriate Access Rights Policy from the list.
- Do not check "Remote."



- 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.



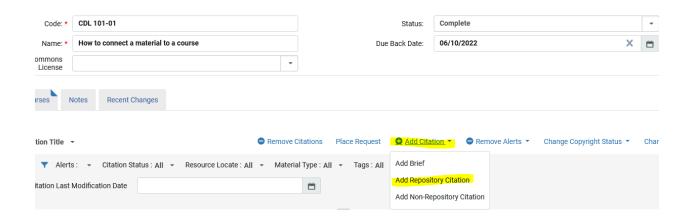
Attaching the Resource to the Course Record

- The Alliance has a lot of existing <u>documentation for course reserves</u>. A Course with a Reading List is required to add a CDL resource to course reserves.
- To add a course:
 - o 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.

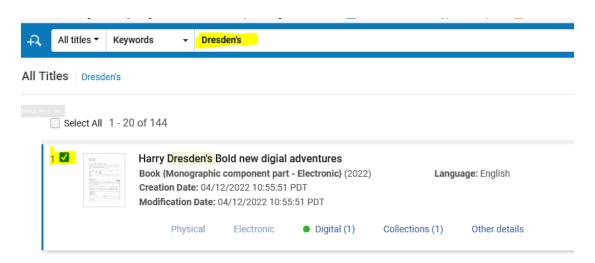


- To add a reading list to a course:
 - Click the ellipses on the right side of the course on the Courses screen and select Reading List.

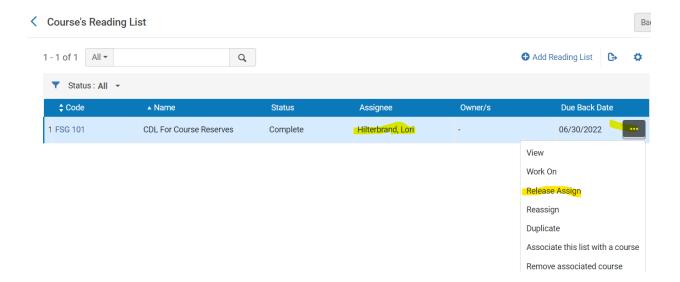
- Select Add Reading List.
- o Enter the course code and name, and click Add and Close.
- To add the CDL resource to the reading list:
 - Select Work On from the ellipses menu on the right side of the reading list.
 - Select Add Citation, and then Add Repository Citation.



- 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.

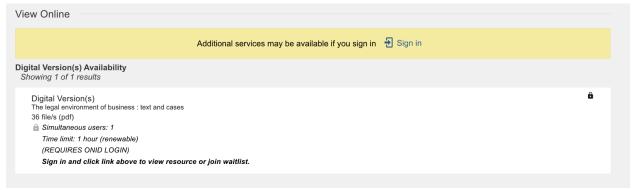


- Select Set Complete next to the CDL title and change the status of the reading list to complete.
- Click Save.
- Select Release Assign from the reading list's ellipses menu to allow others at your institution to work on the reading list.

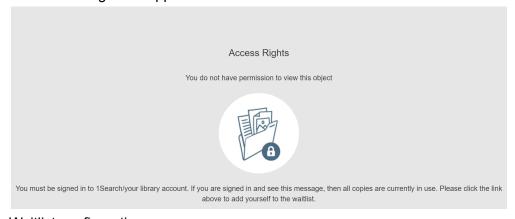


Testing Access

*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.



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



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