One-Stop Course Readings:
a breakthrough in campus collaboration

RYERSON
UNIVERSITY

Everyone Makes a Mark

# OLA Super Conference
# February 1, 2013

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# What is meant by "one-stop course readings"?

- Course readings of all formats delivered through **Blackboard**, the course management system

- The Library does the **copyright pre-checking** for printed course packs processed by the Bookstore

# What is meant by "one-stop course readings"?

- Ares becomes the **centralized copyright permissions database** for:
    - the Library's E-Reserve & Audio Visual services,
    - the Bookstore
    - Distance Education (part of Chang School Continuing Ed.)
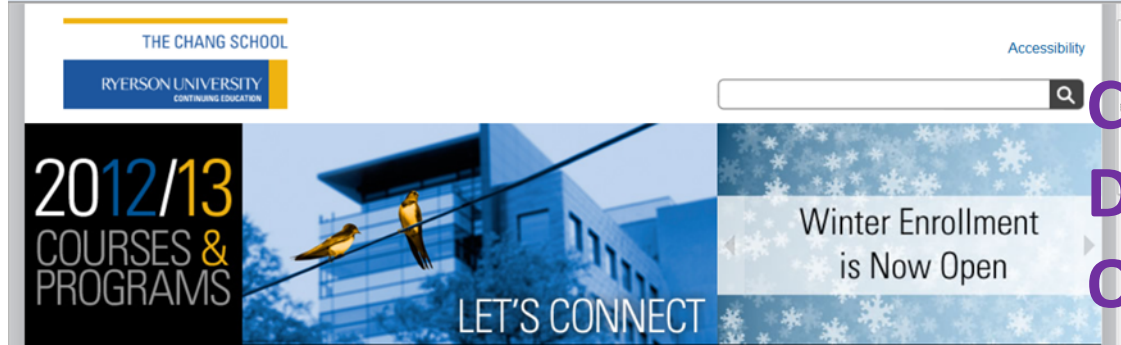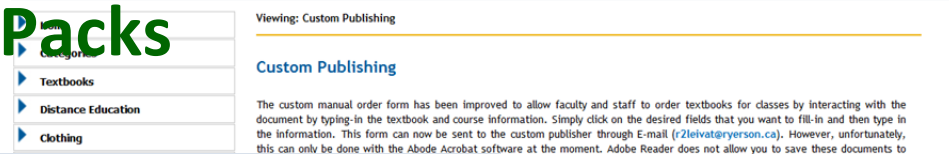
# Who are involved in the project?
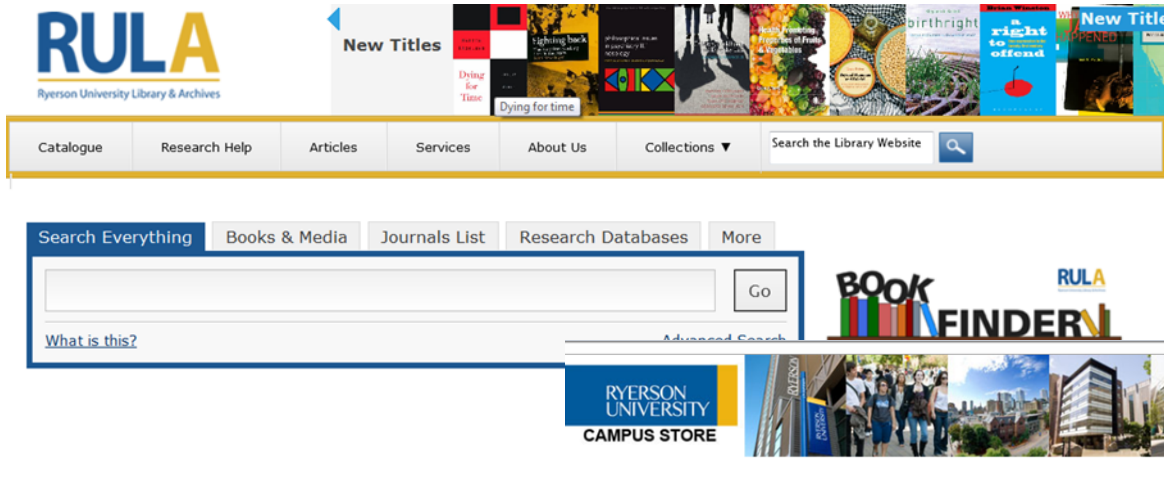
**Library: E-Reserves**

**Bookstore : Course Packs**

**Continuing Education/ Distance Education: Online Courses**

# What brought the three together?

# What are the driving forces behind Ryerson's E-Reserve development?

- **C**opyright default leadership

- **C**ourse management system access

- **C**ollaboration with campus stakeholders

# How are these reflected in E-Reserve's developments?

- 2004: E-Reserve started in Library catalogue

- 2005: switched to **Blackboard** eReserve module ; targeted at Distance Education **(DE**); handled **copyright** permissions

- 2007: concept of shared **copyright** database with **DE**

- 2011: Ares system adopted to reinforce **copyrigh**t control; Ares linked with **Blackboard**

- 2012: One-Stop Course Readings pilot centralized **copyright** checking and data for 3 campus stakeholders
  - **Library**, **Bookstore** and **DE**

# Single sign-on & direct link from Blackboard to Ares



RYERSON UNIVERSITY

**Welcome to Ryerson University's Central Authentication Service!**

You have requested access to a site

Before entering your my.ryerson
"https://cas.ryerson.ca".

For security reasons, please exit you

**Have an account?**

Please enter your credentials and click the L

Username: ocheung
Password: ••••••••

Login   Clear

**Step 1:** Sign into Blackboard

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🏠 Home ⋮ ❓ Help ⋮ 🔒 Logout

my.ryerson | online courses & organizations | Content Collection | RAMSS | eHR | my library

🔒 Tools
- 📢 Announcements
- 📅 Calendar
- 📋 Tasks
- 📝 View Interim Marks for Online Courses

🔒 Online Courses and Organizations

**Courses you are teaching:**
Demo Course - Ares eReserve
RefWorks/Refshare Sandbox *(unavailable)*
Library Test Course

**Organizations in which you are participating:**

🔒 Hot Links
IMPORTANT!
Copyright update
Web Mail
WhoPlusYou - where

**Step 2:** Select course in Blackboard

RULA
Ryerson University Library & Archives

ares
automating reserves

Search
⦿ Keyword   ○ Tags

- **Switch to Student Mode**
- **Your Courses**
- **Proxy Course Tools**
  - ⁺ Course Home
  - ⁺ Authorized Users
  - ⁺ Add Course Readings
  - ⁺ Course Readings

**Step 3:** Direct link to Ares from Blackboard

**Course Details**

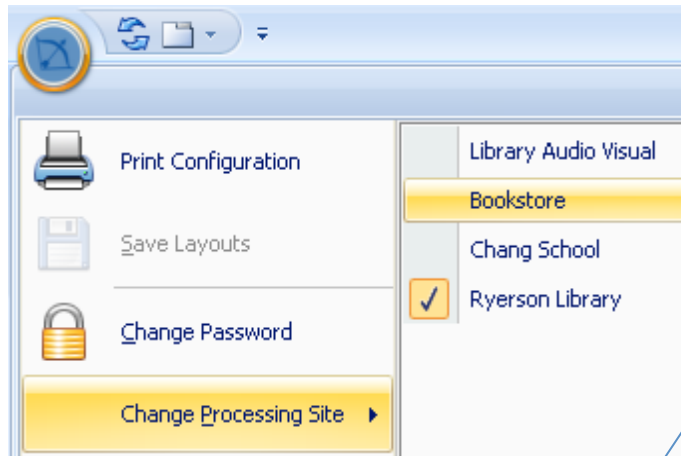**library_sandbox** Library Test Course
Summer 2012
WILSON, Sarah (Sally)
fake course for testing

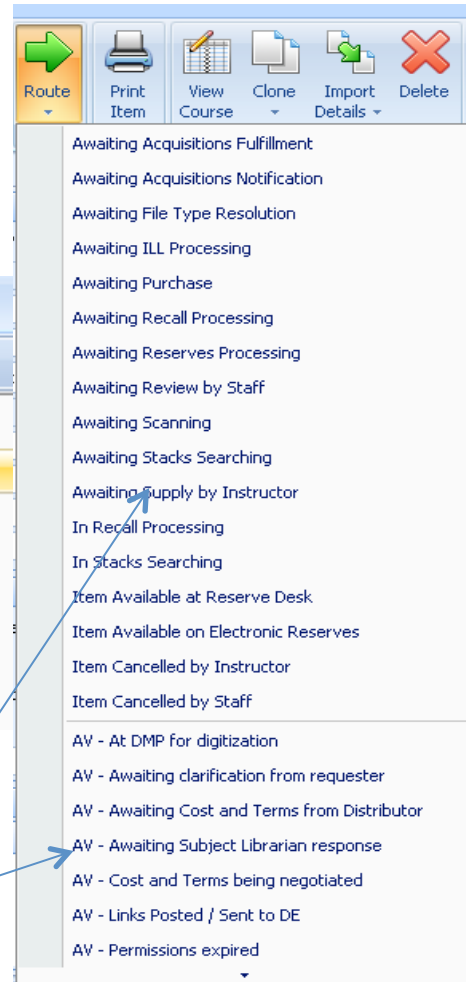Email subscriptions allow you to receive an email notification when a new item becomes available in this course.

# Ares – One system serving different departmental needs

Four processing sites & Department specific work queues

Bookstore

Route | Print Item | View Course | Clone | Import Details | Delete

Awaiting Acquisitions Fulfillment
Awaiting Acquisitions Notification
Awaiting File Type Resolution
Awaiting ILL Processing
Awaiting Purchase
Awaiting Recall Processing
Awaiting Reserves Processing
Awaiting Review by Staff
Awaiting Scanning
Awaiting Stacks Searching
Awaiting Supply by Instructor
In Recall Processing
In Stacks Searching
Item Available at Reserve Desk
Item Available on Electronic Reserves
Item Cancelled by Instructor
Item Cancelled by Staff

AV - At DMP for digitization
AV - Awaiting clarification from requester
AV - Awaiting Cost and Terms from Distributor
AV - Awaiting Subject Librarian response
AV - Cost and Terms being negotiated
AV - Links Posted / Sent to DE
AV - Permissions expired

Print Configuration
Save Layouts
Change Password
Change Processing Site ▶

Library Audio Visual
Bookstore
Chang School
✓ Ryerson Library

system work queues

AV specific queues

AV - At DMP for digitization
AV - Awaiting clarification from requester
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Bookstore - Awaiting CP Processing
Bookstore - Awaiting file/hard copy request
Bookstore - Awaiting Instructor's Response
Bookstore - Awaiting Library Checking
Bookstore - Awaiting Permissions
Bookstore - Awaiting scanning
Bookstore - CP Items Online
Bookstore - CP Processed
E-Reserve - Awaiting Information by Instructor
E-Reserve - Awaiting Transactional Licence
E-Reserve - Contact Instructor
E-Reserve - ERM

E-Reserve

# Ares – one system to centralize copyright data

# What's the outcome of the project?

**Before project**

- Fall 2011

( *Ares implemented*)

157 courses

4619 Web links

87 Documents (mostly book chapters)

121 instructors

**After project**

- Fall 2012

*(Project implemented)*

307 courses

6266 Web links

953 documents (mostly book chapters)

212 instructors

# What's the outcome of the project?

**Before**

- <u>Winter 2012</u>

( *Ares implemented*)

146 courses

3813 Web links

116 Documents (mostly book chapters)

112 Instructors

**After project**

- <u>Winter 2013</u>

(*Project implemente*d)

219 courses

4617 Web links

631 documents (mostly book chapters)

162 instructors

# How's the service being used since Fall 2011?

- 400,000 views

- 27,725 Web links

- 2,192 Documents

# How can we cope with the volume?

Before the project:

- 2004 -  1 copyright lead hand
- 2007 -  1 library technician +AV/ILL students

# The project
## Cross-training within the whole department

- **Copyright**: 1 library technician

- **E-reserve processing** : 6 technicians ( from AV & ILL) 50% - 60% time during peaks; ad hoc help from other departments

- **E-reserve scanning**: 2 Circ lead hands + back ups

  All Circ staff rotate + 2 work students

*All staff have a variety of other duties besides reserves
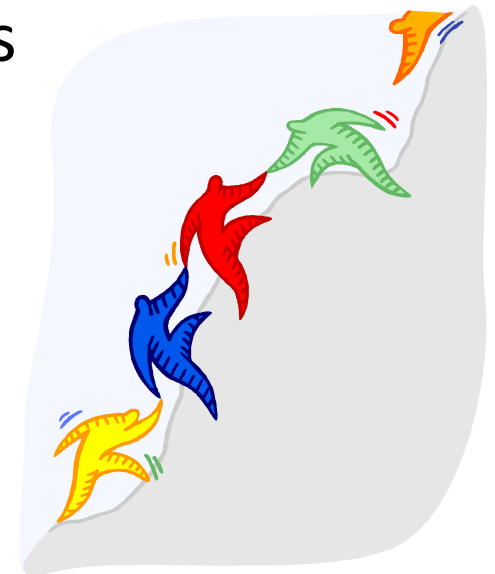
# Origins: Bookstore Survey

- Study started Jan. 2012 to look at over Fall Term 2011 print Course Manuals

- Checked 2250 entries, book material from 2000+

- 20% of readings were from materials already licenced as Electronic Resources by the library

- $62, 000+  projected annual overpayment

# One Stop Workflow
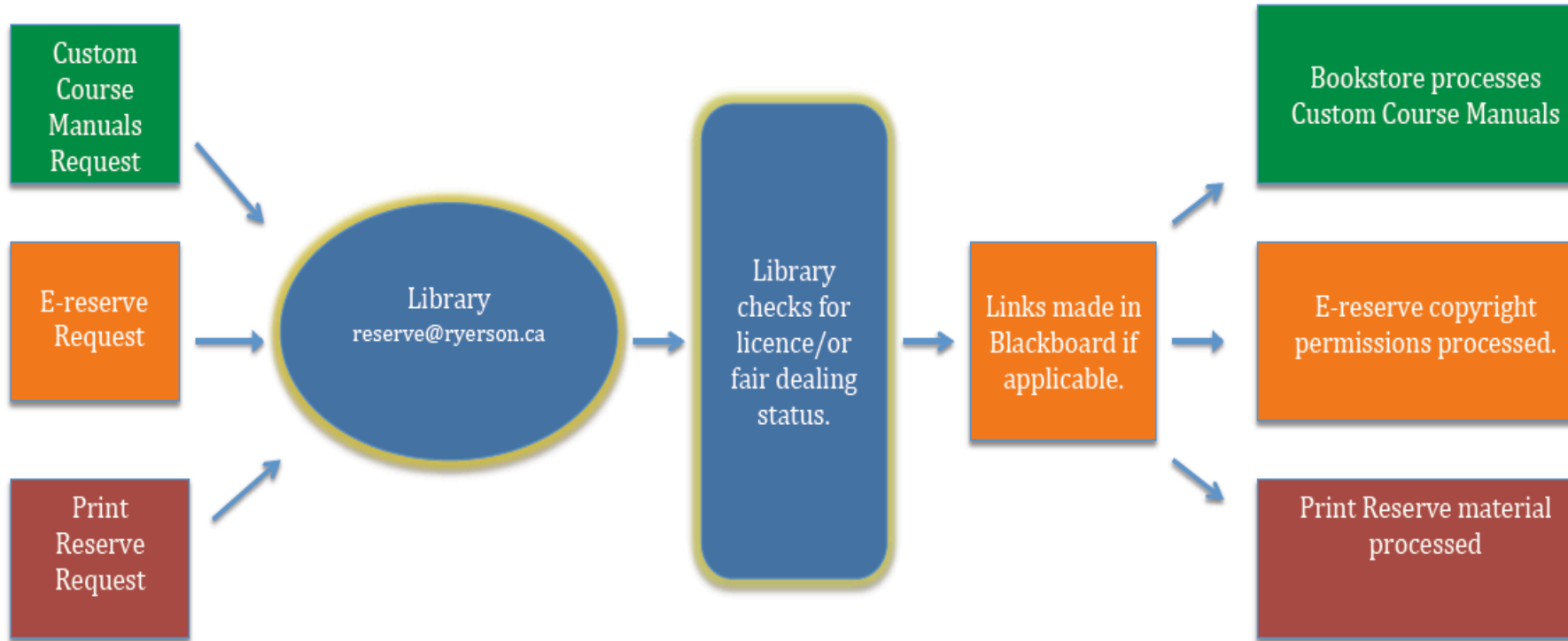
# Course Pack Checking

- Started Spring 2012
- Library checks print Course Manual
- Liaise with Faculty about "blended" delivery model
- Passed to Bookstore material that remained in print Course Manuals
- More material may go electronic long term

# Training

- Training on-going with eReserves
- E-Reserve manual, other forthcoming
- Staff training is various as there are different workflows for each area, Bookstore, DE, E-Reserve
- ARES update training is on-going

# Benefit: Bookstore Relations

- Improved library – Bookstore relationships
- Recognition of transition stage and flexibility
- Honesty about future
- Potential opportunities, collaboration

# Benefits of One Stop?

- We do copyright checking – faculty LOVE this
- We do persistent links
- Electronic resources are covered under licences NOT Copyright Act
- We can fully and legally utilize electronic resources for teaching

# Benefits - Faculty Relations

- Very positive Faculty reaction (they see copyright checking as additional work)

- Faculty can opt-out of E-Reserve and do it themselves
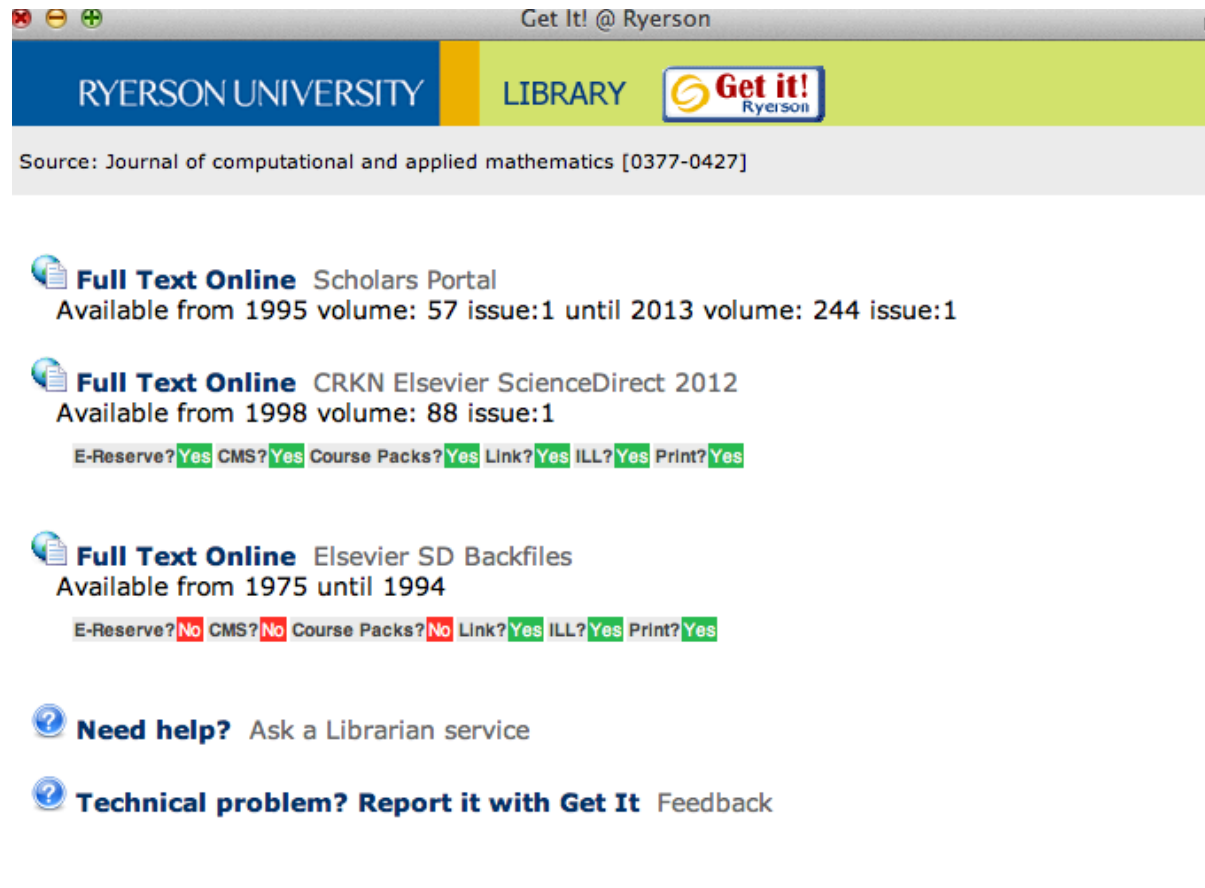
- Library visibility

# Benefits  - Students

- Like course readings in one spot

- No cost for readings delivered electronically

# Copyright Checking Workflow

- Checking Electronic Library Resources using Scholar's Portal Tool

# E-book Copyright Checking

The Morgan and Claypool  *Digital Library* consists of 50- to 100- page "lectures" which are self-contained e-books synthesizing an important research or development topic.  Each is authored by an expert in the field.

Terms of Use.

## License Terms of Use

| | | |
|---|---|---|
| **Can I make an electronic copy for use in an e-reserve system?** | Yes | You may include material from this resource in e-reserves, which are electronic copies of articles stored on a secure network for use by students in connection with a specific class.<br>**More/Less Information** |
| **Can I post a copy in a course management system?** | Yes | You may include material from this resource in course management systems like Blackboard.<br>**More/Less Information** |
| **Can I put it in a course pack?** | Yes | You may include material from this resource in course packs, which are compilations of articles for use by students in a class.<br>**More/Less Information** |
| **Can I link to it?** | Yes | You can create a persistent (or durable) electronic link to an individual article or ebook.<br>**More/Less Information** |
| **Can I make print or electronic copies?** | Yes | You may make print and electronic copies for personal use.<br>**More/Less Information** |

**For Libraries**

| | | |
|---|---|---|
| **Is ILL allowed?** | Yes | Interlibrary loan is a service whereby users from one library may borrow material from another library via fax, surface mail or courier, for the purposes of research or private study, and not for commercial use. Geographic restriction may be specified in the license.<br><br>For further inquiries, contact Ryerson Library Interlibrary Loan. You may also send your query via email to racer@ryerson.ca<br><br>**More/Less Information** |

# E-books & Collection Management

- Multiple user e-book workflow
- E-book use tracked in catalogue as part of ARES workflow
- Supports demand driven acquisition

# Copyright Tracking

- Some customizations to ARES:
- Nature of Works field

# Other Copyright Checking Tools

- Access Copyright Look-up Tool
- Fair Dealing tracking
- Transactional licences (works not covered under existing licences)

# Persistent Links

- Hard to teach faculty due to lack of consistency between databases
- Requirement of the licences of many of the E-resources
- Easily linked to directly to Blackboard Course Readings through ARES
- Link as a preference before posting full text

# Benefits: Accessibility of Readings

- E-Reserve rescans poor quality material as necessary

- Bookstore can get access library books as necessary, so new scans can be made as necessary.

- All e-reserve material is OCR'd so it is minimally accessible for all students

# Benefits: Copyright Centralization

- Better understanding of course reading usage and patterns

- Accessible permission records

- Less duplication, more efficiency

- Saving in staff time for Bookstore + eReserve

# Copyright Trends

- Majority of readings delivered through E-Reserve  available via Library licences

- Many readings from book monographs covered under Fair Dealing or E-book subscriptions

- Ongoing tracking and monitoring or use of resources by licence type gives us data

# Ares/BlackBoard System Integration Team

Library
- Service & operation (e-reserve librarian and 1 library technician)
- System implementation & support (Head of Library IT and 1 programmer)
- Web interface customization: (web service librarian)

Campus IT
- Server Support
- SQL Server Database Administrator.
- IT security ( firewall ports issues)
- Blackboard Support

Vendor Support
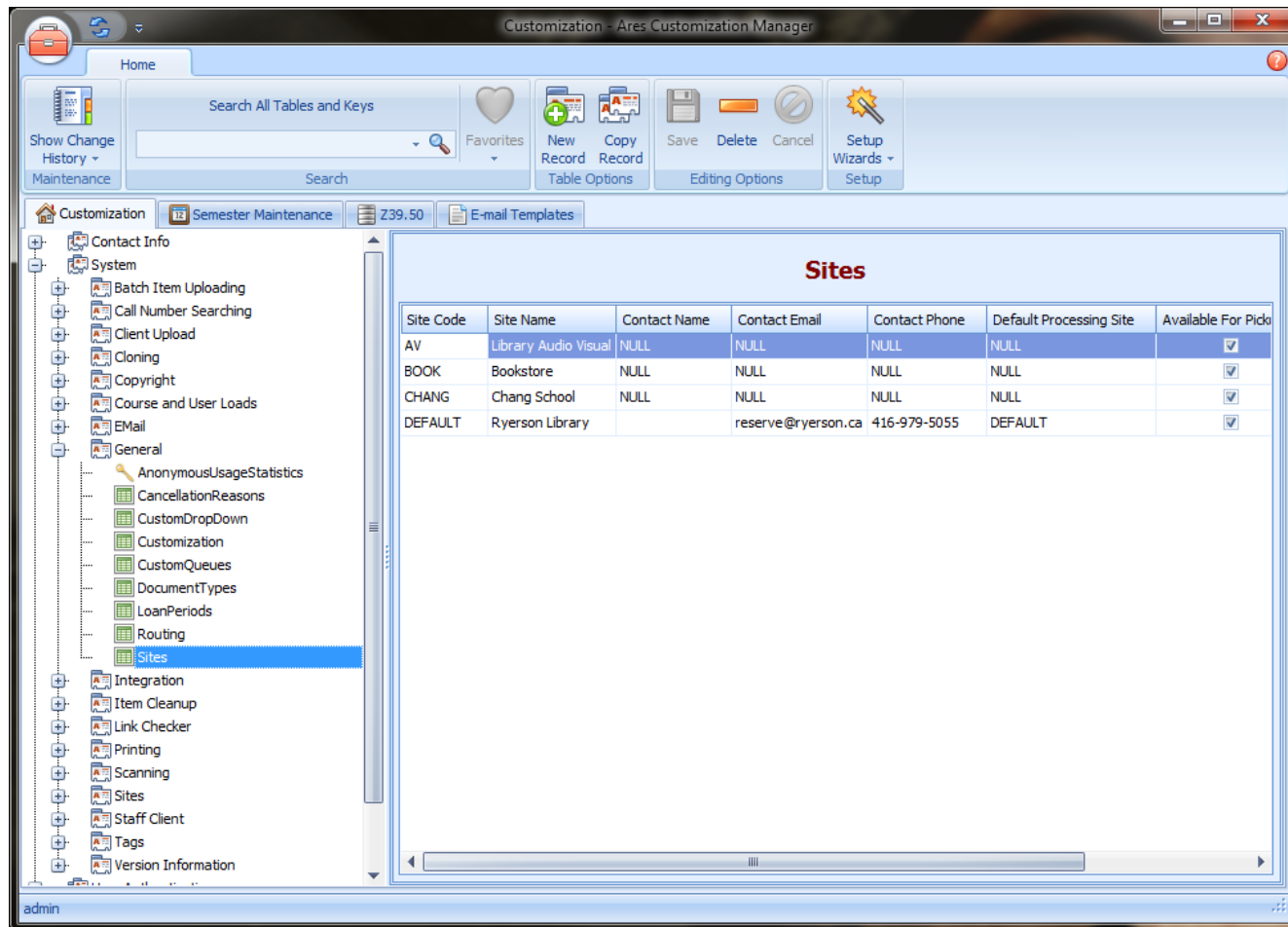Customer Service Agent

# Ares Implementation To Do List

- Meetings with Campus IT & ongoing communication
- Setup Ares test server and production servers
- Install Blackboard building block on test server
- Testing Ares system and Blackboard integration
- Web interface customization
- Training
- Roll out Ares system in the production environment

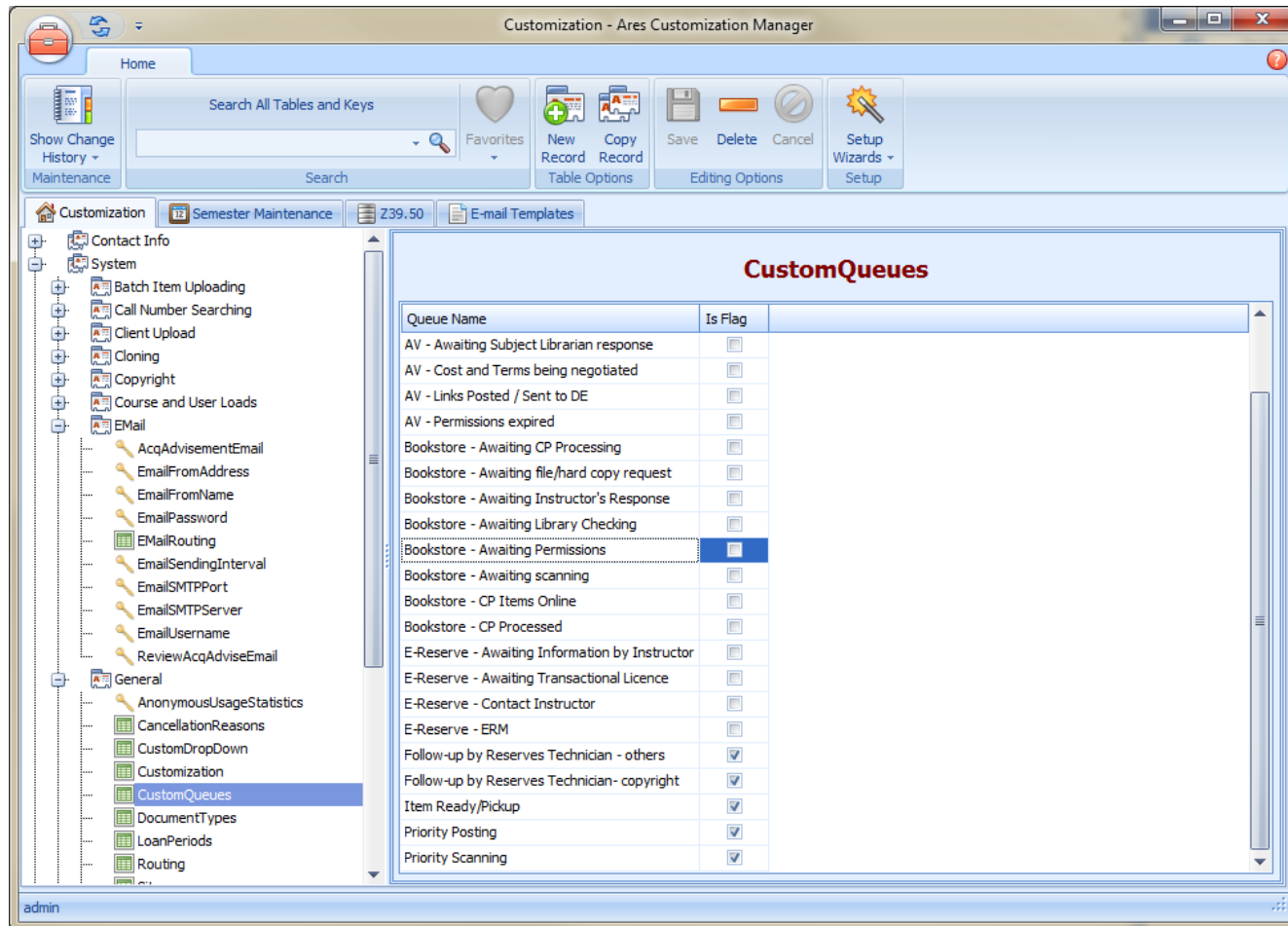# One-Stop Course Reading System Needs

## Lots of customization

- Multiple processing sites
- New work queues
- Email templates
- Book scanner (better technology for scanning book chapters)
- Bookstore data transfer (from a Excel file)

# Multiple Processing Sites

# New Work Queues

# Email Templates

# Book Scanner

(source: book2net.net)
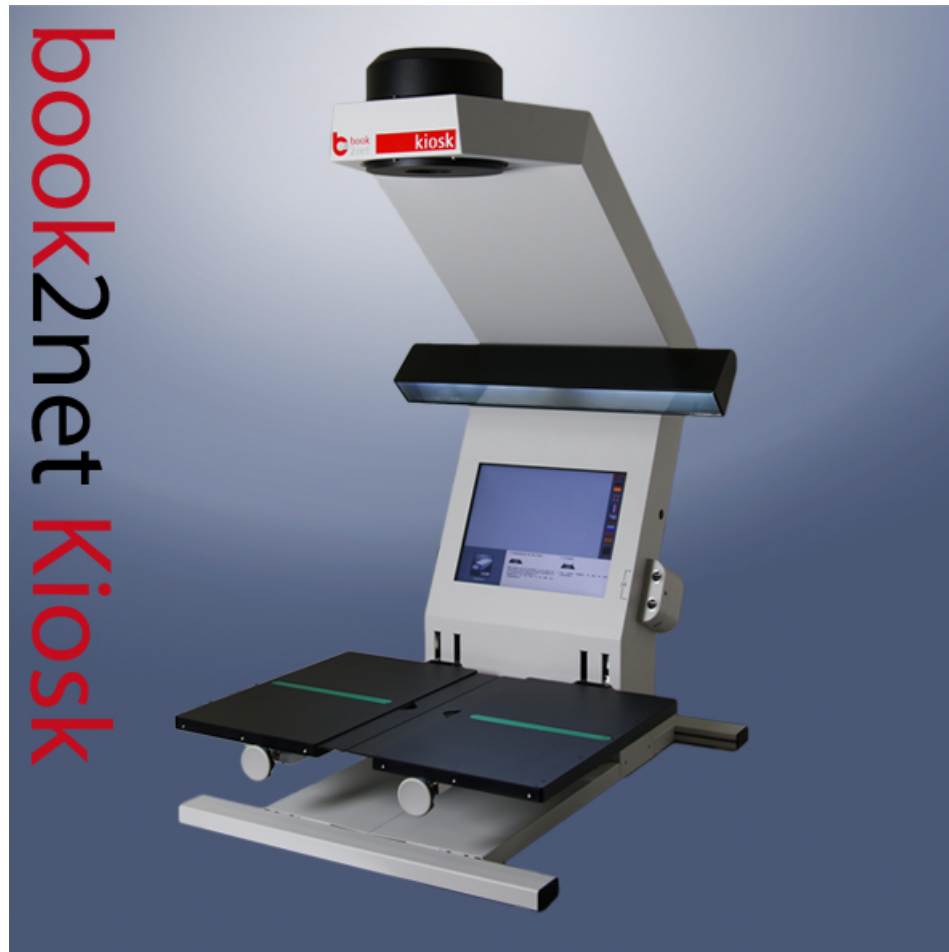
# Bookstore data transfer

- Clean up the original data on the excel sheet (CSV file)
- Create a temporary database table and match the data fields with the CSV file
- Export data from the CSV file to the temporary database table
- Import data from the temporary database table to Ares Items and Course database tables

* We have a good programmer!

# Technical Issues

- Performance Issues (one of the old versions)
- Integration with BlackBoard is not that straightforward
- Ares Software releases are too frequent
- Client software upgrade & maintenance

# Future Plan

- Integrate print reserve (from catalogue) with Ares system

- Better stats or usage information

- Add-ons?