

# Alma, Leganto and the CA Electronic Use Survey

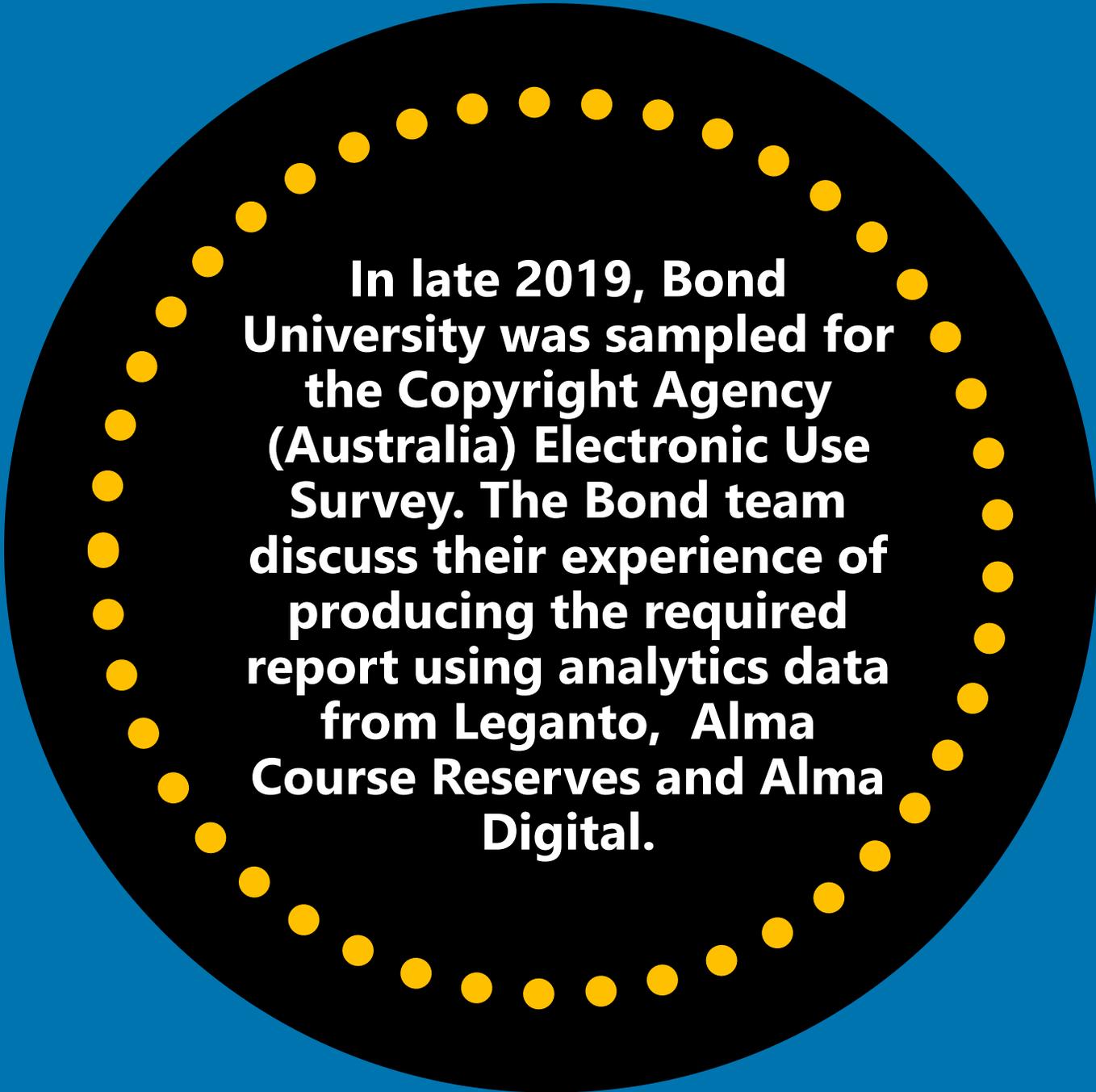
Bond University

ANZREG Webinar  
5<sup>th</sup> February 2020



Presenters:

- Peta Hopkins
- Antoinette Cass
- Jessie Donaghey



**In late 2019, Bond University was sampled for the Copyright Agency (Australia) Electronic Use Survey. The Bond team discuss their experience of producing the required report using analytics data from Leganto, Alma Course Reserves and Alma Digital.**

**Technology**



# Systems Background

How do we manage e-Reserve?

# Components in the e-reserve ecosystem

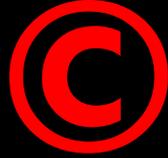
The screenshot shows the 'RESOURCE LISTS' interface in Leganto. The main heading is 'HDR Library Resources'. Below it, there are navigation options like 'SEND LIST' and 'NEW SECTION'. A search bar contains the text 'Literature Review Texts (9)'. Below the search bar, there are several book entries with details like author, title, and availability status. For example, 'The literature review: a step-by-step guide for students' by Ridley, Diana Dr., 2nd ed., 2012 is listed as 'Complete Available at Main Library General - LB2369 .R525 2012'.

The screenshot shows the 'Alma' interface for course reserves. The main heading is 'Edit Citations (1 - 20 of 428)'. Below it, there are navigation options like 'Remove Citations', 'Remove Alerts', 'Change Copyright Status', 'Change Status', 'Expand', and 'Clear all'. The interface displays a list of citations with details like 'Citation ID', 'MMS ID', 'Section Name', 'Reading List', 'Request Status', 'Copyright Status', 'Resource Locate Status', and 'Tags'. For example, the first citation is 'A leader's framework for decision making' with a 'Request Status' of 'Complete' and a 'Copyright Status' of 'Approved Automatically'.

The screenshot shows the 'Bond University Library' interface. The main heading is 'A Leader's Framework for Decision Making'. Below it, there is a 'Warning' message: 'This material has been reproduced and communicated to you by or on behalf of Bond University in accordance with section 113P of the Copyright Act 1968 (Act). The material in this communication may be subject to copyright under the Act. Any further reproduction or communication of this material by you may be the subject of copyright protection under the Act. Click 'Proceed' below to view this resource.' The interface also shows a 'Description' section with details like 'Title: A Leader's Framework for Decision Making', 'Creator: Snowden, D.J. and Boone, M.E.', and 'Type: Text'.

- Digitisations are identified from resource lists managed in Leganto
- Leganto is part of the **communication** process
- The only files that are stored in Leganto repository are self-declared (or creative commons licensed) and are not reportable for EUS
- Staff work from Alma Course Reserves to either:
  - Send a resource sharing request
  - Find hard copy for **scanning** locally
- Alma Digital is the view-port for the digitised objects – the delivery part of the **communication**

**Introduction to the EUS**



# **The Copyright Agency/AMR**

12 week digital resources copying and communication survey

# Electronic Use System monitoring means

Material that is copied  
and/or communicated in  
electronic form will be  
included in the EUS

**Copying** - scanning – creating a digital file

**Communication** – placing in a resource list

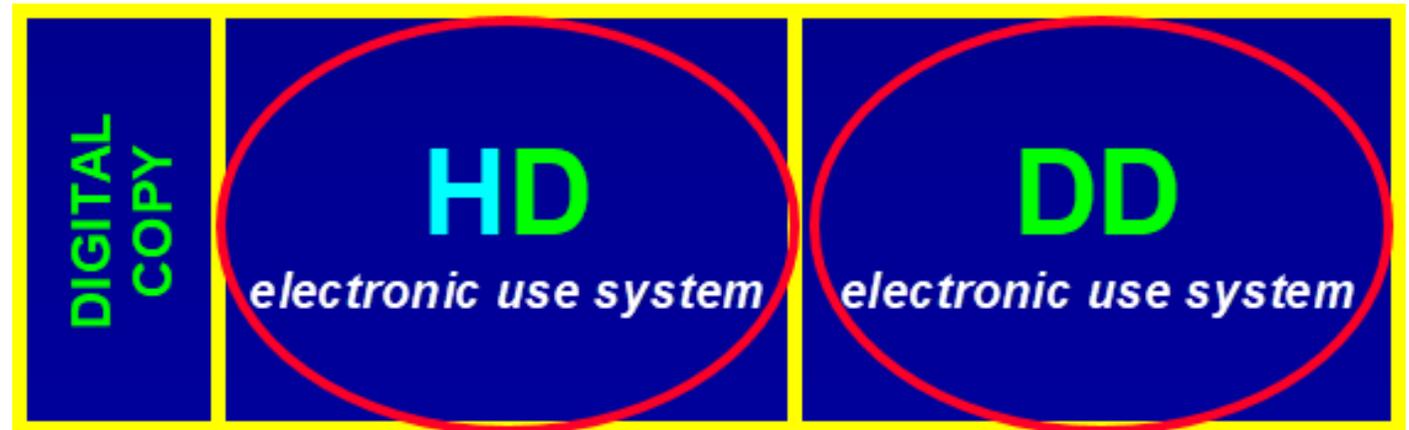
# Purpose of EUS

To determine the quantity of copyright material copied for educational purposes

To identify the material copied so that payment can be made to copyright owners

Includes scanned hardcopy works and digital works placed in e-reserve and used in resource lists

Separate PDF files of resources containing artistic works/tables/images to be supplied



# Responsibilities

The university will be responsible for capturing all electronic statutory licence copying occurring at the Centre/s during the monitoring period and providing that data to AMR

AMR will assign each centre a Unique ID

Progress file of data collected during the first two weeks is due at the end of the 3rd week of the monitoring period

The final data file must be submitted to AMR two weeks after the end of the survey and must contain all records for the 12 week monitoring period

## ELECTRONIC USE SYSTEM SPREADSHEET

|                          |  |                    |                           |                        |
|--------------------------|--|--------------------|---------------------------|------------------------|
| Name of University       | Bond University  |                    |                           |                        |
| Name of Contact          | Antoinette Cass  | Monitoring starts: | Monday, 30 September 2019 | 1st Progress file due: |
| Contact Telephone Number | 07 5595 1523   | Monitoring ends:   | Sunday, 22 December 2019  | Data up to:            |
| Contact Email Address    | <a href="mailto:Antoinette.Cass@bond.edu.au">Antoinette.Cass@bond.edu.au</a> |                    |                           |                        |

### Details about the material copied and/or communicated (please put DK in columns where information is unknown)

| Centre Code | ISBN/ISSN etc or URL | Publisher Name | Title of Publication | Date of Publication | Title of Work | Author(s) / Creator(s) of work |
|-------------|----------------------|----------------|----------------------|---------------------|---------------|--------------------------------|
| 501         |                      |                |                      |                     |               |                                |
| 501         |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |
|             |                      |                |                      |                     |               |                                |

# Verifying the data

AMR is required to verify the data before passing it on to CA and Universities Australia

Careful checking is required to make sure that:

All required fields are present and in the right order

No compulsory fields are left blank – can use DK (Don't Know)

All calculations are correct (e.g. number of 'pages'; total copies)

# Preparation - It's all in the detail

Fill in all the bibliographic details of each e-reserve item in as much detail as possible

- ISSN or ISBN
- Publisher
- Author
- Title of book for a book chapter or Title of journal for an article
- Title of book chapter or Title of article
- Page numbers

The Alma analytics report filled the empty cells with the letters DK (but this didn't always happen)

# More details

Citation Copyright Attributes Citation Attributes Notes Tags

Copyright Attributes

|                            |                                     |   |
|----------------------------|-------------------------------------|---|
| Copyright Status           | Not Determined                      |   |
| Volume                     |                                     |   |
| Number of Students         | 12                                  |   |
| Number of Copies for Staff |                                     |   |
| Required Chapters          |                                     |   |
| Required Pages             | From 1 To 30                        |   |
|                            | From To                             |   |
| Total Required Pages       | 30                                  |   |
| Includes image(s)          | <input checked="" type="checkbox"/> |   |
| Date Available From        | 02/09/2019                          | X |
| Note 1                     |                                     |   |
| Note 3                     |                                     |   |

|                               |   |   |
|-------------------------------|---|---|
| Copyright Auditing Required   | <input checked="" type="checkbox"/>       |   |
| Issue                         |   |   |
| Number of Copies for Students |   |   |
| Resource Total Pages          | 223                                       |   |
| Total Chapters Count          |   |   |
| Source for Copyright *        | P - Hardcopy, or Electronic and Paginated |   |
| Date Available To             | 14/12/2019                                | X |
| Note 2                        |   |   |

- If any of the scanned pages contain a table, graph, illustration or photograph this is considered an 'artistic work' and *this must be noted* with a tick in the 'includes images' box
- Enter total page numbers

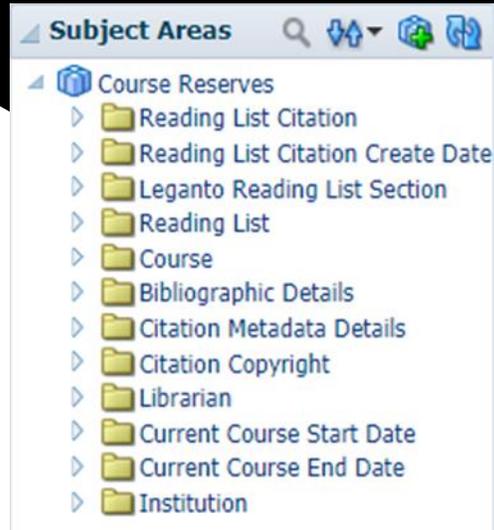
● Alerts(2)

| Date                     | Type                                      |
|--------------------------|---|
| 04/09/2019 16:33:55 AEST | Citation Resource Sharing Request Created |
| 05/09/2019 09:25:40 AEST | Citation Resource Sharing Request Sent    |

If a document delivery request is placed during the survey period for a citation don't dismiss these alerts

# Using Alma Analytics Course Reserves

1. Report prompt and filters
2. Customised column headings
3. A lot of formulas required
4. Extra columns for internal use

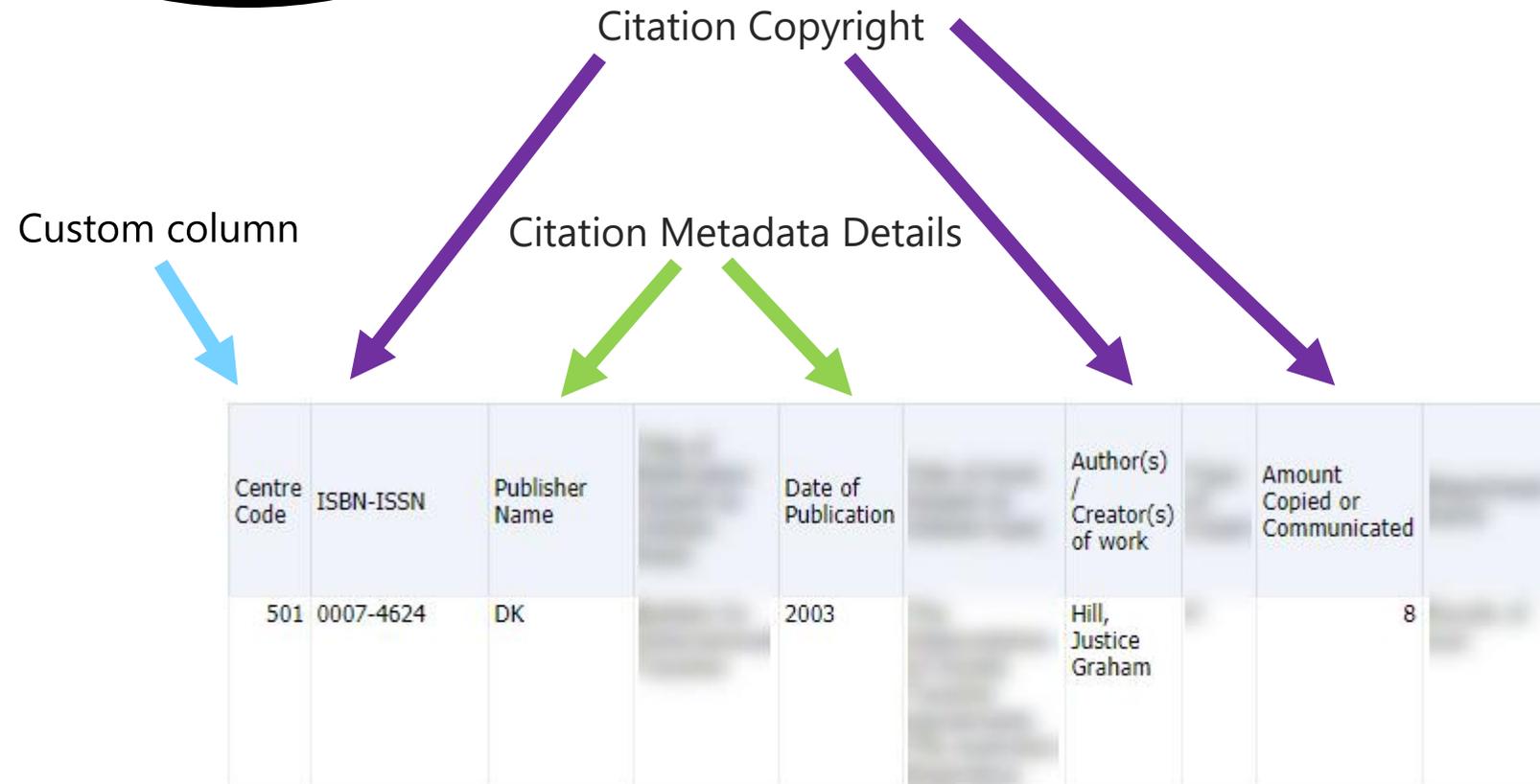


Copyright Status is equal to **Approved, AutoApproved**  
and CC Approval Date is between **20/01/2020** and **24/01/2020**

| Centre Code | ISBN-ISSN     | Publisher Name | Title of Publication (based on citation type)   | Date of Publication | Title of Work (based on citation type)                                     | Author(s) / Creator(s) of work | Type of Count | Amount Copied or Communicated | Department name                       | What have you done with the published material? | COPYING Date material copied | COPYING Scan or Other Digital Copy? | COPYING Number of copies for internal students | COPYING Number of copies for external students | COPYING Number of copies for staff | COMM Date of communication | COMM Type of communication | COMM General or specific intended audience? | COMM Target audience: Internal Students | COMM Target audience: External students | COMM Target audience: Staff | Is the item to be included in a course pack? | Does the item contain incidental Artistic Works? | Name of file provided (unique identifier)              | Citation ID      | Citation Representation Url for Images   | Course Code                | Course start date | Course end date | MMS Id           | Citation Modified By | Citation Alerts |
|-------------|---------------|----------------|---|---------------------|--|--------------------------------|---------------|-------------------------------|---------------------------------------|---|------------------------------|-------------------------------------|--|--|------------------------------------|----------------------------|----------------------------|---|---|---|-----------------------------|--|--|--|------------------|--|----------------------------|-------------------|-----------------|------------------|----------------------|-----------------|
| 501         | 9780880914451 | DK             | International dietetics and nutrition terminology (IDNT) reference manual: standardized language for the nutrition care process | 2011                | IDNT V3.6c definitions   | American Dietetics Association | P             | 5                             | Faculty of Health Sciences & Medicine | Both  | 28/01/2020                   | Scanned                             | 0  | 0  | 1                                  | 28/01/2020                 | New                        | 5   | 21                                      | 0                                       | 0                           | No   | No   | 2011-ADA-IDNT-Nutritional-Diagnosis-Terminology-V3.doc | 4803820040002381 | https://ap01.alma.exlibrisgroup.com/view/delivery/61BOND_INST/1296089240002381 | NUTR71-109_2020_JAN_INT_01 | 06/01/2020        | 20/01/2020      | 993052891002381  | 80040827             |                 |
| 501         | 0007-1624     | DK             | Bulletin for International Taxation   | 2003                | The Interpretation of Double Taxation Agreements-The Australian Experience | Hill, Justice Graham           | P             | 8                             | Faculty of Law                        | Both  | 23/01/2020                   | Scanned                             | 0  | 0  | 1                                  | 23/01/2020                 | New                        | 5   | 7                                       | 0                                       | 0                           | No   | No   | 2003Hill-InterpretationofDoubleTaxation.pdf            | 4679928290002381 | https://ap01.alma.exlibrisgroup.com/view/delivery/61BOND_INST/1281539460002381 | LAWS13-498_2020_JAN_STD_01 | 06/01/2020        | 20/01/2020      | 9930456591902381 | 80015191             |                 |
| 501         | 0007-1624     | DK             | Bulletin for International Taxation   | 2003                | The Interpretation of Double Taxation Agreements-The Australian Experience | Hill, Justice Graham           | P             | 8                             | Faculty of Law                        | Both  | 23/01/2020                   | Scanned                             | 0  | 0  | 1                                  | 23/01/2020                 | New                        | 5   | 9                                       | 0                                       | 0                           | No   | No   | 2003Hill-InterpretationofDoubleTaxation.pdf            | 4679928290002381 | https://ap01.alma.exlibrisgroup.com/view/delivery/61BOND_INST/1281539460002381 | LAWS77-498_2020_JAN_STD_01 | 06/01/2020        | 20/01/2020      | 9930456591902381 | 80015191             |                 |

# Analytics and the tricky bits

## Part 1: About the work



# Analytics and the tricky bits

## Part 1: About the work

When citation = book then use "Citation Metadata Details"."Title"

When citation = article then use "Citation Metadata Details"."Journal Title"

When citation = book then use "Citation Metadata Details"."Book Chapter Title"

When citation = article then use "Citation Metadata Details"."Title"

Used SUBSTRING to display the last character

Used Bins to group Academic Departments into Faculties

| Title of Publication (based on citation type) | Title of Work (based on citation type)                                     | Type of Count | Department name |
|---|--|---------------|-----------------|
| Bulletin for International Taxation           | The Interpretation of Double Taxation Agreements-The Australian Experience | P             | Faculty of Law  |

# Analytics and the tricky bits

## Part 2: What are you doing with the work?

All contain CASE WHEN formulas looking for the presence of a citation alert containing 'Resource Sharing' (to determine whether we communicated or both)



| What have you done with the published material? | COPYING Date material copied | COPYING Scan or Other Digital Copy? | COPYING Number of copies for internal students | COPYING Number of copies for external students | COPYING Number of copies for staff |
|---|------------------------------|-------------------------------------|--|--|------------------------------------|
| Both  | 23/01/2020                   | Scanned                             | 0  | 0  | 1                                  |

# Analytics and the tricky bits

## Part 2: What are you doing with the work?

Scanned when no Citation Alert containing 'Resource Sharing'

"Citation Copyright"."CC Approval Date"

Use these numbers when no Citation Alert containing 'Resource Sharing'

No citation alert for RS = Both

Citation alert for RS = Communicated

| What have you done with the published material? | COPYING Date material copied | COPYING Scan or Other Digital Copy? | COPYING Number of copies for internal students | COPYING Number of copies for external students | COPYING Number of copies for staff |
|---|------------------------------|-------------------------------------|--|--|------------------------------------|
| Both  | 23/01/2020                   | Scanned                             | 0  | 0  | 1                                  |

# Analytics and the tricky bits

## Part 2: What are you doing with the work?

"Citation Copyright"."CC Approval Date"

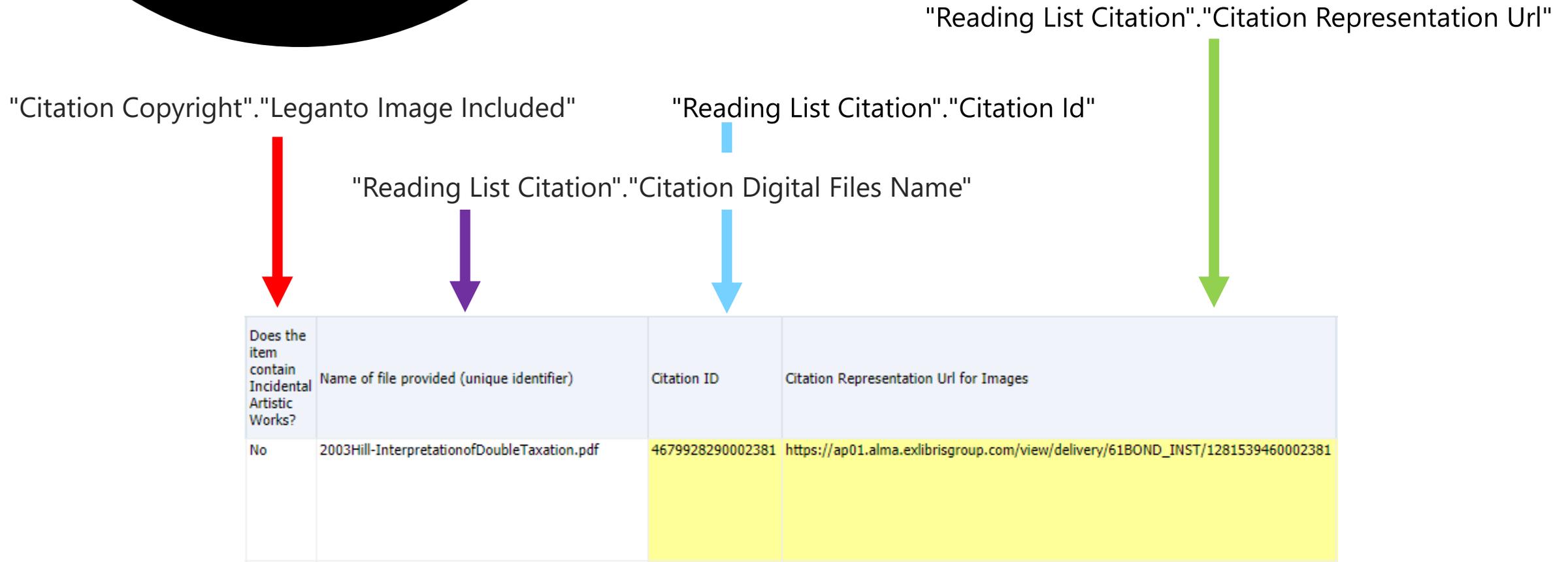
"Course"."Number Of Participants"

Custom columns

| COMM Date of communication | COMM Type of communication | COMM General or specific intended audience? | COMM Target audience: Internal Students | COMM Target audience: External students | COMM Target audience: Staff | Is the item to be included in a course pack? |
|----------------------------|----------------------------|---|---|---|-----------------------------|--|
| 23/01/2020                 | New                        | S   | 7                                       | 0                                       | 0                           | No   |

# Analytics and the tricky bits

## Part 2: What are you doing with the work?



# Analytics and the tricky bits

## Part 3: What about missing metadata?

CASE WHEN formula looking for NULL fields to then add 'DK'. The 'Name of file provided' field and the Citation Representation URL field would be populated when these fields were NULL.

Couldn't get it to work on these fields because I'd combined different fields in the formula already \*I think\*

voila

| ISBN-ISSN | Publisher Name | Title of Publication (based on citation type) | Date of Publication | Title of Work (based on citation type)                                      | Author(s) / Creator(s) of work |
|-----------|----------------|---|---------------------|---|--------------------------------|
| 0007-4624 | DK             | Bulletin for International Taxation           | 2003                | The Interpretation of Double Taxation Agreements- The Australian Experience | Hill, Justice Graham           |

# Checking the EUS report



# Rollovers and consequences

| S   | T   | U   | V  | W  | X   | Y  | Z   |
|---|---|---|--|--|---|--|---|
| COMM<br>General or<br>specific<br>intended<br>audience?<br><input type="button" value="v"/> | COMM<br>Target<br>audience:<br>Internal<br>Students<br><input type="button" value="T"/> | COMM<br>Target<br>audience:<br>External<br>students<br><input type="button" value="v"/> | COMM<br>Target<br>audience:<br>Staff<br><input type="button" value="v"/> | Is the<br>item to<br>be<br>included<br>in a<br>course<br>pack?<br><input type="button" value="v"/> | Does the<br>item<br>contain<br>Incidental<br>Artistic<br>Works?<br><input type="button" value="v"/> | Name of file provided (unique<br>identifier)<br><input type="button" value="v"/> | Citation ID<br><input type="button" value="v"/> |
| S   | 0   | 0   | 0  | No   | No  | 2013 Holt Branding in the age<br>of social media.pdf                             | 4679727700002381                                |
| S   | 0   | 0   | 0  | No   | Yes   | 2017 John What's the value of<br>a like.pdf                                      | 4679727710002381                                |
| S   | 0   | 0   | 0  | No   | No  | 2008 Khurana its time to make<br>management a true<br>profession.pdf             | 4679174460002381                                |
| S   | 0   | 0   | 0  | No   | Yes   | 2004 Levitt Marketing<br>Myopia.pdf  | 4679174250002381                                |

Roll over of some units resulted in zero 'Target audience: Internal Students'.  
If 'S' is correct for column 'S' then a number should appear in column 'T'

# Duplicates – how and why - Case 1

Duplicate pub title



|            |            |                               |                                   |      |                    |   |    |                             |
|------------|------------|-------------------------------|-----------------------------------|------|--------------------|---|----|-----------------------------|
| 0868405892 | UNSW Press | Cultural history in Australia | Chapter 8: Cultural Transmissions | 2003 | Richard Waterhouse | P | 14 | Faculty of Society & Design |
| 0868405892 | UNSW Press | Cultural history in Australia | Cultural Transmission             | 2003 | Richard Waterhouse | P | 14 | Faculty of Society & Design |



Different chapt title

Different citation IDs



|                  |  |  |  |                            |            |            |                    |
|------------------|--|--|--|----------------------------|------------|------------|--------------------|
| 4679026400002381 |  |  |  | AUST11-105_2020_JAN_STD_01 | 06/01/2020 | 20/04/2020 | 990001389250402381 |
| 4679270750002381 |  |  |  | AUST11-103_2020_JAN_STD_01 | 06/01/2020 | 20/04/2020 | 990001389250402381 |



Different course codes

Internal use column AB

# Duplicates – Solution – Case 1

Step a) Select the row with the best metadata

Step b) Combine student numbers into that row



|      |            |         |   |   |   |            |     |   |    |   |   |    |    |
|------|------------|---------|---|---|---|------------|-----|---|----|---|---|----|----|
| Both | 12/11/2019 | Scanned | 0 | 0 | 1 | 12/11/2019 | New | S | 40 | 0 | 0 | No | No |
| Both | 12/11/2019 | Scanned | 0 | 0 | 1 | 12/11/2019 | New | S | 43 | 0 | 0 | No | No |



COMM Target audience: Internal students – Column T

Step c) Delete the untouched row

# Duplicates – how and why - Case 2.

## Duplicate title

|            |               |  |   |      |                  |   |    |                             |
|------------|---------------|--|---|------|------------------|---|----|-----------------------------|
| 186373211X | Allen & Unwin | Power and protest : movements for change in Australian society | Out and proudly out : the lesbian and gay movements | 1993 | Burgmann, Verity | P | 22 | Faculty of Society & Design |
| 186373211X | Allen & Unwin | Power and protest : movements for change in Australian society | Out and proudly out : the lesbian and gay movements | 1993 | Burgmann, Verity | P | 22 | Faculty of Society & Design |

Different citation IDs



|                  |  |  |  |                            |            |            |                    |
|------------------|--|--|--|----------------------------|------------|------------|--------------------|
| 4679270800002381 |  |  |  | AUST11-103_2020_JAN_STD_01 | 06/01/2020 | 20/04/2020 | 990001647810402381 |
| 4679270920002381 |  |  |  | AUST11-103_2020_JAN_STD_01 | 06/01/2020 | 20/04/2020 | 990001647810402381 |

Same course code



## Lessons learned

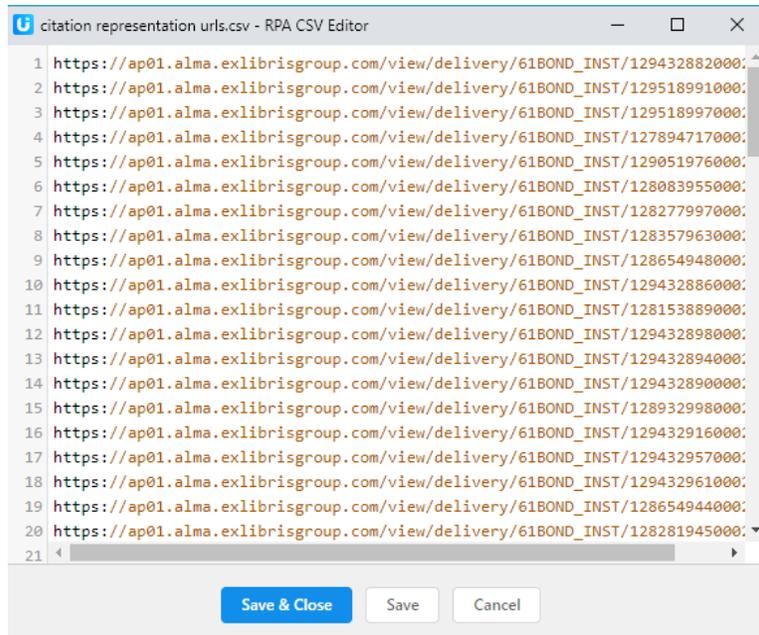
1. Check the report weekly to fix any missing metadata within Alma
2. Can't do much about duplicates until exported
3. Be aware of rollover metadata issues and timing
4. Get your data clean now



# Kantu and downloading the required PDFs

EUS requires copies when DK in any column and for resources containing artistic works

1. Citation representation URLs uploaded in Kantu



2. Created a very simple marco in Kantu

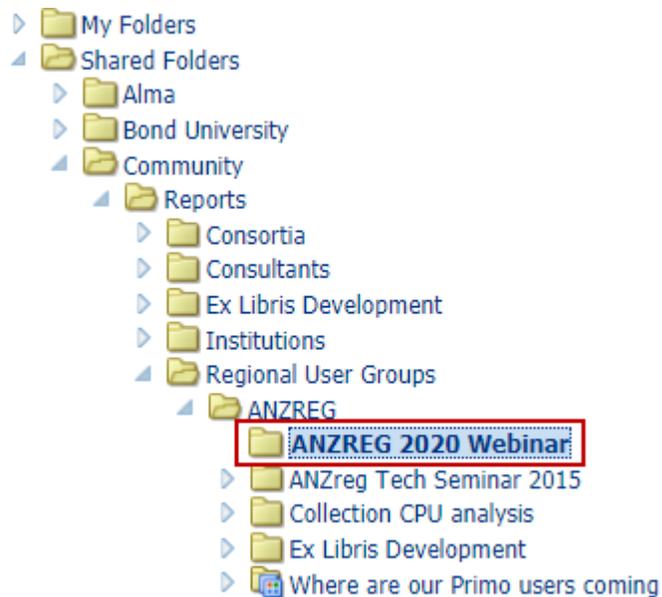
| Command           | Target                           |
|-------------------|----------------------------------|
| waitForPageToLoad | https://library.bond.edu.au/     |
| csvRead           | citation representation urls.csv |
| open              | \${COL1}                         |
| click             | link=Proceed                     |
| click             | xpath=//*[@id="downloadB...      |

3. Make sure you have authenticated into Alma Viewer first and then play the macro on a loop

- ← Open a webpage
- ← Read the CSV file
- ← Open the first URL
- ← Click the proceed button (in Alma viewer)
- ← Click the download button (in Alma viewer)

Explore the report  
for yourself!

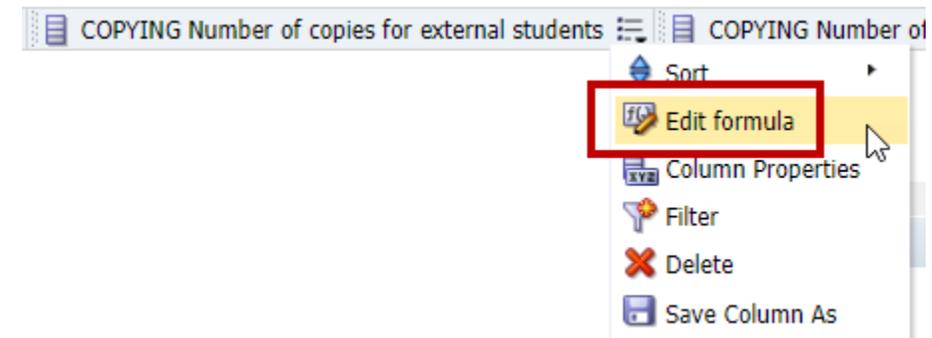
'CA Electronic Use Survey Report'  
shared in Analytics:



Some changes made:

- Removed Bins formula for Department Name column
- Removed our Centre Code

Kept everything else as is. Please review the formulas used to decide if they suit your institution:



# Questions?

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**Peta Hopkins**  
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[phopkins@bond.edu.au](mailto:phopkins@bond.edu.au)



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