VERSION 2.0
DECEMBER 2021
702P08779

Xerox® FreeFlow® Makeready

Copyright Management Service User Guide

xerox™

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Introduction

This chapter provides an overview of this guide including conventions used. The following chapters are included:

- Chapter 1, Introduction
- Chapter 2, Basic Concepts
- Chapter 3, FreeFlow Makeready for Copyright Management
- Chapter 4, Copyright Management Service Admin Application & Copyright Management Search Application
- Chapter 5, Copyright Management Service: CCMOrder.exe
- Chapter 6, Database Utilities
- Chapter 7, Error Messages and Remedial Actions
- Chapter 8, Multiple CMS Client Configuration
- Chapter 9, Appendix :Field Names and Usage

About this Guide

This guide contains instructions for using Xerox FreeFlow Makeready with Copyright Management Service.

Before performing any procedures in this guide, become familiar with its contents and conventions.

Conventions Used in this Document

The *FreeFlow Makeready Copyright Management Service User Guide* uses the following conventions:

Convention	Description
Bold	Boldface type is used for the following: • Directory paths; for example, "Browse to **Win_ nt40/ Xeroxdrv"** • Text that is typed; for example, "Type **purple** or **red**." • Calling attention to text that is particularly important; for example, "Select **Stop** on the user interface window. **Do not press the red stop button on the controller.**" • Words on the screen
< >	Variable information that is displayed on the screen or that can be entered as part of a command line is enclosed within angle brackets. Examples include "Unable to copy <filename>;" "set p <printer>."
Italics	Document and library names are shown in italics; for example: Refer to the *Security Compliance Audit Tool*.
>	Indicates flow of steps required to complete an action; for example: Click **Insert > Picture > From File**.

Note: Notes are hints that assist with performing a task or understanding the text. Notes are presented in italics in separate paragraphs, as shown here.

Printing this Document

This document includes blank pages that paginate correctly with duplex printing.

Basic Concepts

This chapter shows a system diagram and explains a basic concepts and terminology. The copyright management functionality is divided as follows:

- Copyrights Order Entry is done thru Xerox FreeFlow Makeready. This is described in Chapter 3.
- Copyrights Order Reporting & Management is done thru Xerox FreeFlow Copyright Management Server (CMS). This is described in Chapter4.
- Copyrights Clearance Center (CCC)a third party, which provides the API for web based, automated ordering process, does copyrights Order Fulfillment. The CMS server implements this API and the Makeready uses CMS server for sending orders to CCC. These functions are internal mechanisms and not described in this guide.

The system of copyright ordering and management, described in this guide, uses the following basic concepts:

- **Coursepack**: A Coursepack is a file of type RDO (.rdo), which has been enhanced with copyrights specific functionality. The RDO is a Xerox format. The RDO files produced by "Makeready for Copyright Management" can hold contents (scanned images as well as PDF, TIFF, etc) of a coursepack as well as its metadata (Coursepack Title, Coursepack Number, etc). Each coursepack is further divided into sections, which hold copyright metadata (ISBN, Author, Title, etc.) for individual articles in a coursepack.
- **Content Experts**: define coursepack contents and the related metadata. Content experts are Professors, Instructors, Reference Librarians, etc.
- **Makeready Operators**: enter contents and its related metadata in to the system and place orders for the copyrighted material.
- **Administrator**: maintains a working system; perform backend processes such as reporting, order cancellation, and guide operators.
- **CCC**: Copyright Clearance Center (a third-party) provides copyrights permission clearance. The customer of this system must enter into appropriate agreement with directly CCC and obtain an account to be used by this system for order placement.

The FreeFlow Makeready software with CMS Options is installed using one of two configurations:

- **CMS Server:** In the CMS Server configuration, the CMS Server is also installed, including the Database and the Web server. The CMS "Reports and Management" User Interface is available only in this configuration. If the site is running only one FreeFlow Makeready with CMS, this is the configuration that should be installed.
- **CMS Client:** In the CMS Client configuration, only FreeFlow Makeready is installed with client software that connects to an existing, previously installed CMS Server. The CMS "Reports and Management" is not available on the client machine, but is to be used on the CMS Server machine, which collects data for FreeFlow Makeready installed on both the CMS Server and CMS Client machine.

Note: It is important to recognize that the CMS Client depends on the CMS Server machine. For successful operation, both machines should be operating and communicating correctly.

Note: The RDO file contains all the document contents, as well as the copyright metadata; the CMS Server contains all the copyright order information and up-to-date status of the orders. This division allows document contents and order data to be stored and archived independently of each other.

System Diagram

Figure .1 FreeFlow Makeready and CMS Server Functions

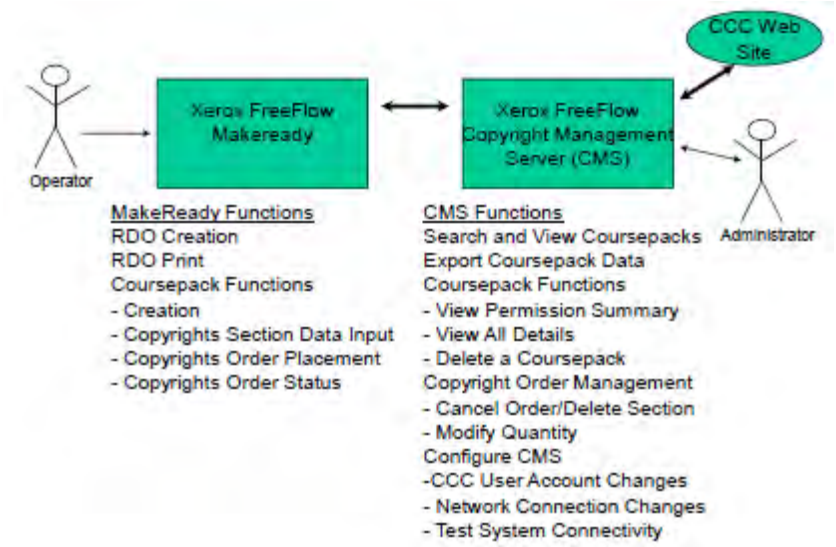
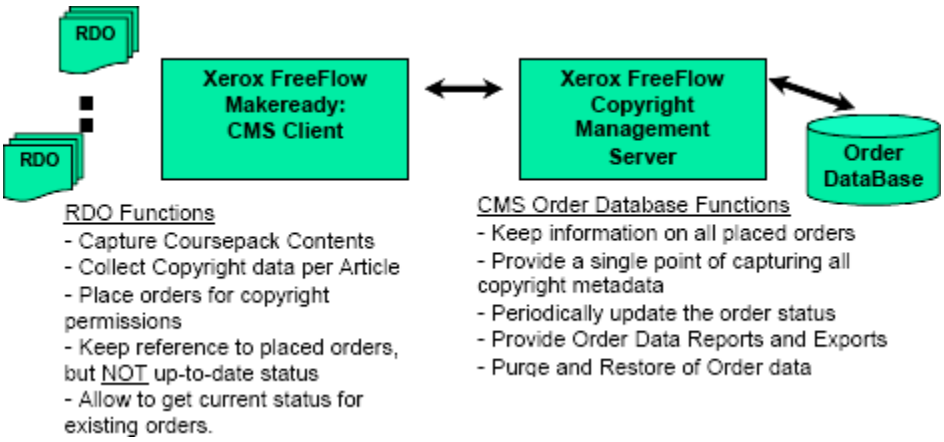


Figure .2 Functions of RDO and CMS Server Database



Copyrights/Coursepack Ordering

The coursepack workflow should be as follows:

1. **Content Experts** provide a list of articles and related copyright metadata to be included in a given coursepack. The copyright metadata includes ISBN, Article Title, Publication, Publication Year, etc. This information is provided to the print shop operator.
2. **Makeready Operators** enter both document-level and section-level coursepack information in the Makeready application. Document-level and section-level properties present the Makeready Operator with several Copyright attribute fields that can be filled in to define the coursepack and facilitate copyright requests. (The Content Expert generally provides much of the information for each article that s/he wants included in the coursepack). This process might take a few minutes to several days depending on the size and complexity of the coursepack. During the input of the copyright information, the operator has an opportunity to perform a "Quick Price" on each of the "Section Properties" (that is, articles) within the given coursepack. The Quick Price activity validates whether the copyrights are available via the CCC. No order is registered with the system at this point.
3. Once the coursepack is complete, with all the sections (that is, articles) required, the Makeready Operator places an order for the entire coursepack in the "Document Properties" page in Makeready. Once an order is placed, the FreeFlow CMS server records the coursepack data. From this point onward, the order data changes can be seen on the CMS UI.

Copyrights/Coursepack Modifications

The following copyright order modifications are allowed:

- Changing the number of permissions for all the sections in a coursepack. This function is performed at the FreeFlow CMS user interface.
- Updating/Deleting a section/copyright in a coursepack. This function can be performed solely within the Makeready application if the copyright order has not been processed. **If the order was previously placed, it requires action both at Makeready and the CMS UI.**
- Adding a section to an existing coursepack that has already been ordered is performed at the Makeready application.

FreeFlow Makeready for Copyright Management

Xerox FreeFlow Makeready Copyright Management Service is a software application that you can use to enter documents that contain one or more pages that are protected under copyright permissions. The high-level copyright summary information can be entered into the Makeready Document Properties and the copyright information can be entered into the Section Properties.

This chapter contains the procedures for using the Makeready Copyright Management software on a workstation.

Prerequisites

The following prerequisites must be satisfied before using FreeFlow Makeready Copyright Management Service.

- Make sure that FreeFlow Makeready is installed on the workstation. Refer to the *Xerox FreeFlow Makeready Installation Guide* for the procedures.
- Know how to use Makeready functionality. Refer to the Xerox FreeFlow Makeready Installation Guide for the procedures Xerox FreeFlow Makeready Reference Guide for the procedures.
- Make sure the license for the Copyright Management is valid. Refer to the *FreeFlow Makeready System Administration Guide*.
- Make sure the Copyright Management Service is installed. Refer to the *FreeFlow Makeready Copyright Management Service Install Guide*.

Specifying the Copyright Management information in Makeready

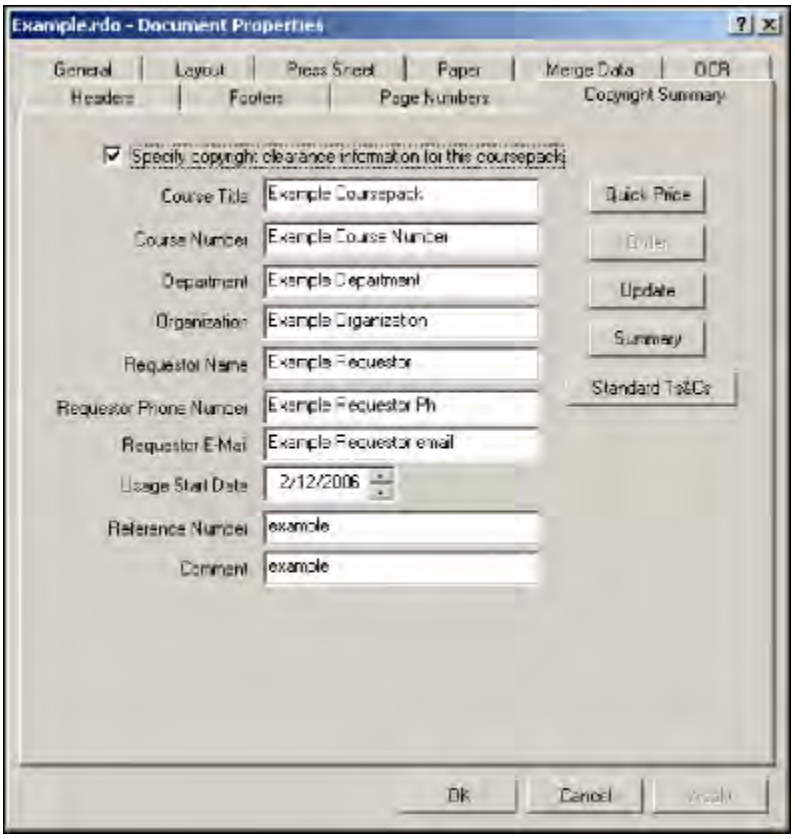
The following procedures are used with the Makeready application to create a coursepack.

USING THE DOCUMENT PROPERTIES FOR COPYRIGHT INFORMATION

1. Create or open a coursepack document in FreeFlow Makeready by selecting Insert> File or File > Open or File > New.
2. Navigate to the desired document (TIFF, JPEG, PDF, ASCII,EPS, or PostScript file).
3. Select **Insert**, or select**File > Open**.
4. The .RDO opens in the FreeFlow Makeready application window.

5. Next, select the topmost document icon to select the entire document:
6. Right-click on the document icon, and select **Document Properties** from the drop-down. The Document Properties window opens.
7. Select the **Copyright Summary** tab. Refer to the definitions listed at the end of this section for details for each entry.

8. Select the **Specify copyright clearance information for the coursepack** check box, if not already checked. Fill in the appropriate coursepack information for the coursepack you are creating.
9. When you are finished, select **OK** to return to the document.



SUMMARY COURSEPACK ENTRIES IN DOCUMENT PROPERTIES

- **Manage Copyrights checkbox**: You must mark this check box to enable the other fields and buttons in this window. This check box also enables the Copyright tab to appear in the Section Properties.
- **Course Title**: A required, user-supplied field that specifies the name of the coursepack.
- **Course Number**: A required, user-supplied field that specifies a number for the coursepack.
- **Department**: A required, user-supplied field that specifies the name of the department requesting the coursepack.
- **Organization**: A required, user-supplied field that specifies the name of the university requesting the coursepack.
- **Requester**: A required, user-supplied field that specifies the name of the professor requesting the coursepack.
- **Requester Phone Number**: An optional, user-supplied field that specifies the phone number of the professor requesting the coursepack.
- **Requester E-Mail**: An optional, user-supplied field that specifies the email address of the coursepack creator.
- **Usage Start Date**: A required, user-supplied field that specifies the start date of the course.

- **Reference number**: An optional, user-supplied field that specifies the account number of the professor requesting the coursepack.
- **Comment**: An optional, user-supplied field used for any purpose.

The list of buttons includes:

- **Quick Price**: When this button is selected, all CCC-assisted sections (that is, Automatic and Research Order) are processed as if the Quick Price button was selected on each section property sheet. If any of the CCC-assisted sections contain ISBN, Total Pages, Start Page, End Page, or Number of Permissions fields that are empty or invalid, the operation is aborted. Further, the number of permissions requested will be updated in each of the Automatic and Research Order sections.
- **Order**: When this button is selected, all Automatic and Research Order sections are processed as if the Order button was selected on each section property sheet. If any of the Automatic sections contain ISBN, Total Pages, Start Page, End Page, or Number of Permissions fields that are empty or invalid, the operation is aborted. Manual copyright sections will be skipped if the number of permissions in the section does not match the number of permissions being ordered. The operator is expected to go to each "Manual" section and place the order so it is recorded by the CMS Server. After this button is selected, a scrolling list of 'Copyright Status ' boxes displays and requires the user to select **OK**. If the order is Granted, the result is stored in the Total Fees field of each section. If the order is either Pending or "Forwarded to Rights Holder," the Total Fees field is set to zero.
- **Standard Terms and Conditions**: Displays the standard terms and conditions set by the CCC. For each order, the specific terms and conditions are also recorded at the CMS Server.
- **Summary**: When this button is selected, a status summary of each copyright displays in a scrolling list box that describes the title, ISBN, order status, permissions requested, and copies printed previously for each section with a non-blank ISBN within the document.
- **OK**: Selecting this button preserves the changes made to the user input fields.
- **Cancel**: Selecting this button discards the recent changes made to the user-input fields.

USING MAKEREADY SECTIONS WITH COPYRIGHT MANAGEMENT

Sections are convenient methods for delineating different articles that could make up the coursepack. Document sections are the only place in which to define individual copyright articles. If the document has previously been segmented (Tagged) into sections, proceed to the Section Properties for Copyright Information section below. Otherwise, follow the steps outlined here to create document Sections within the coursepack.

1. At the Makeready document display screen, highlight one or more pages that represent the first section (such as, article)of the coursepack.
2. Right-click on the page(s) and select Tag Section from the dropdown.
3. Type a name that describes the selected section in the Section Name window (such as, Chapter 1).
4. Select **OK**.
5. Repeat Steps 1 through 4 to define all the sections for the coursepack.

COPYRIGHT ENTRIES WITHIN SECTION PROPERTIES

The following describes the copyright properties that display information and operator entries for the copyright attributes defined for the section.

- **Automatic, Manual, and Research Order radio buttons**: These radio buttons determine the mode of operation. If selected, Automatic utilizes the copyright server to:
  - Place orders
  - Obtain quick price requests
  - Retrieve copyright information based on ISBN/ISSN

When Automatic mode is selected, these use the CCC engine available at http://www.copyright.com/ to accomplish the above. In addition, several fields will be read-only to the user. When manual mode is selected, these fields should be filled out by the user so they appear in reports generated by the copyright server.

The operator is also responsible for:

i) Contacting the rightsholder for orders.

ii) Contacting the rights holder for quick price requests.

iii) Retrieving copyright information based on ISBN/ISSN.

The operator, of course, can still use http://www.copyright.com/ for items (ii) and (iii), but Xerox should not advertise this in the documentation. Note that if the user switches from automated to manual, the Order Status, Terms, and Conditions, and Total Fees fields will be cleared.

If an ISBN number is not in CCC's database or if, in a rare case, the ISBN has a duplicate entry, the Research Order radio button becomes available for selection. In this case, the Operator should fill in as many fields as possible, and then place a Research order.

However, for a Research Order, the Publication Year, Publication, Title, Author, and Publisher are required fields. Such an order is placed just like an Automatic order, but the CCC carries out research to check if the title is available for the permission.

- **International Standard Book Number (ISBN) or International Standard Serial Number (ISSN)**: This is a unique number assigned to each published work that can be obtained from the copyrights page (usually a few pages after the front cover) or by browsing http://www.copyright.com/ .

  This is a mandatory, user-input field for both manual and automatic modes. When copying the number from a published work, do not enter the dashes. If an order has been placed, and the ISBN number is changed, the Order Status, Terms and Conditions, and Total Fees will be cleared.

- **Publication Year**: In Automatic mode, this field is a required, user supplied field. In manual mode, this is an optional, user-input field, for supplying the published year.

- **Date Of Issue**: In Automatic mode, this field is a read only field, supplied by the copyright server. In manual mode, this is an optional user-input field for supplying the date on which the work was published. This is an important field for some serial and journal publications, and the availability of the permission might depend on this date. If the desired permission is not available, it is recommended that CCC be contacted for clarification.

- **Start page and End page**: These are required fields used by the Quick Price and Order calculations when Automatic and Research Order is selected; they are optional fields when Manual is selected. If the work lacks page numbers, simply enter spaces or contact the CCC. Note also that page numbers can be specified in a variety of formats, including Arabic and Roman.

- **Number of Permissions**: This user-supplied field is required by the Quick Price and Order calculations. Note that the number specified by the user is not consolidated with all previous orders;the resulting order status and fees apply only to the most recent order. Example: Suppose the user orders three permissions from the document properties after ordering five permissions from the section property sheet. When the user selects "Update", they

receive status on only the most recent order for three permissions. This policy applies regardless of which property sheet was used to place the order. **In this example case, it is expected that the user contacts the CMS Administrator and requests to "cancel" order of the previous five permissions.**

- **Total pages**: This is a user-supplied field required by the Quick Price and Order calculations. This specifies the total number of pages being used in the coursepack, *not the total pages in the work*.
- **Reference Number**: This field is sent along with the order (Automatic and Research Order) to the CCC web site and is expected to be used for order and invoice reconciliation purposes. *Thus, although it is not a required field, it is recommended that its value be chosen carefully*.
- **Total Fees**: In Automatic mode, this field is a read only field, supplied by the copyright server during Quick Price and Order operations. In automatic mode, this field is not preserved after the user closes the window. The user must regenerate the total fees using the Quick Price, Order, or Update buttons. In Manual mode, this is a required user-input field for supplying the cost of the rights desired by the operator. In Research Order mode, this field is set to zero on order; if the order is later "Granted," its updated value can be obtained using the "Update" button.
- **Order Status**: In Manual mode, this field is a blank read-only field. In Automatic and Research Order mode, this field is blank until an order has been placed. After an order has been placed, it contains one of the following states:
  - **Granted**: Permissions are available for the work.
  - **Denied**: Permissions are not available for the work.
  - **Cancelled**: The request for permissions was cancelled from the copyright service.
  - **Contact Rights Holder Directly**: The CCC cannot give permissions from the Rights holder, but the user can try directly.
  - **Public Domain**: No permissions are required to reprint the work.
  - **Special Order**: The CCC requires you to submit a special order prior to the CCC's contacting the Rights Holder.
  - **Forwarded to Rights Holder**: The CCC has sent the rights request to the Rights holder.
  - **Pending**: The CCC has not sent the rights request to the Rights holder yet.

Note: The date and frequency with which orders are invoiced depend on the user's billing arrangement with the CCC. At the end of each billing cycle, all Granted orders become invoiced. For this reason, Granted can be considered a transitory state, not a final state. All the states listed above are final states except for Granted, Special Order, Forwarded to Rights Holder, and Pending. Granted has already been explained, but the other three states must eventually be replaced by one of the following states: Granted, Denied, Cancelled, or Contact Rights Holder Directly. Furthermore, Special Order may be replaced by Forwarded to Rights Holder or Pending before being resolved in a final state.

- **Publication**: In Automatic mode, this field is a read-only field supplied by the copyright server. In Manual and Research Order mode, this is a required user-input field for supplying the title of the work.
- **Title**: In Automatic mode, this field is a blank read-only field that can be used in future releases. In manual mode, this is an optional field intended to hold the name of the article or chapter in a publication. In Research Order mode, this is a required user-input field.
- **Author**: In Automatic mode, this field is a read-only field, supplied by the copyright server. In manual mode, this is an optional user input field for supplying the name of the author. In Research Order mode, this is a required user-input field.

- **Volume**: In Automatic mode, this field is a read-only field, supplied by the copyright server. In Manual and Research Order mode, this is an optional user-input field for supplying which volume is being referenced.
- **Edition**: In Automatic mode, this field is a read-only field, supplied by the copyright server. In Manual and Research Order mode, this is an optional user-input field for supplying the edition of the work.
- **Publisher**: In Automatic mode,this field is a read-only field, supplied by the copyright server. In manual mode, this is an optional user-input field for supplying the name of the publisher. In Research Order mode, this is a required user-input field.
- **Copyright Owner**: In Automatic mode, this field is a read-only field, supplied by the copyright server. In Manual and Research Order mode, this is an optional user-input field for supplying the name of the rights holder.

The list of buttons will include:

- **Quick Price**: This button is disabled when Manual or Research Order mode is selected. If Automatic mode is selected, the copyright server uses the CCC API to provide the same functionality as the Quick Price functionality available on http://www.copyright.com/ . The required fields for this operation are ISBN, Publication Year, Start Page, End Pages, Total Pages, and Number of Permissions. The result is placed in the Total Fees field. After this button has been selected, a scrolling Terms and Conditions list box displays and requires the user to scroll to the bottom of the text before **OK** can be selected.
- **Order**: If Automatic or Research Order mode is selected, and a Quick Price has been selected for the current ISBN, the copyright server uses the CCC API to provide the same functionality as it would if a logged-in user places an order on http://www.copyright.com/ . After this button is selected, the Terms and Conditions are enabled. If the order is Granted or Invoiced, the result is stored in the Total Fees field. Once an order has been placed, the order button is grayed out. For Manual mode, ISBN/ISSN, Number of Permissions, Total Pages, and Total Fees are required fields.
- **Terms and Conditions**: This button is disabled when either Manual mode or Research Order is selected. If Automatic mode is selected, and a Quick Price has been requested or an order has been placed, the button is enabled. Selecting the button results in FFMR displaying the same text provided when Terms and Conditions is selected after the user places an order on http://www.copyright.com/. Note that this text is always generated dynamically; it is not stored.
- **Update**: This button is disabled when Manual mode is selected. If Automatic or Research mode is selected, and an order has been placed, it is enabled. When this button is selected, the software provides the most up-to-date Order Status, Terms and Conditions, and Total Fees on the most recent order. This policy applies regardless of which property sheet was used to place the order.
- **OK**: Selecting this button preserves the changes made to the user-input fields.
- **Cancel**: Selecting this button discards the changes made to the user-input fields

DEFINING SECTION PROPERTIES FOR AUTOMATIC ORDER MODE

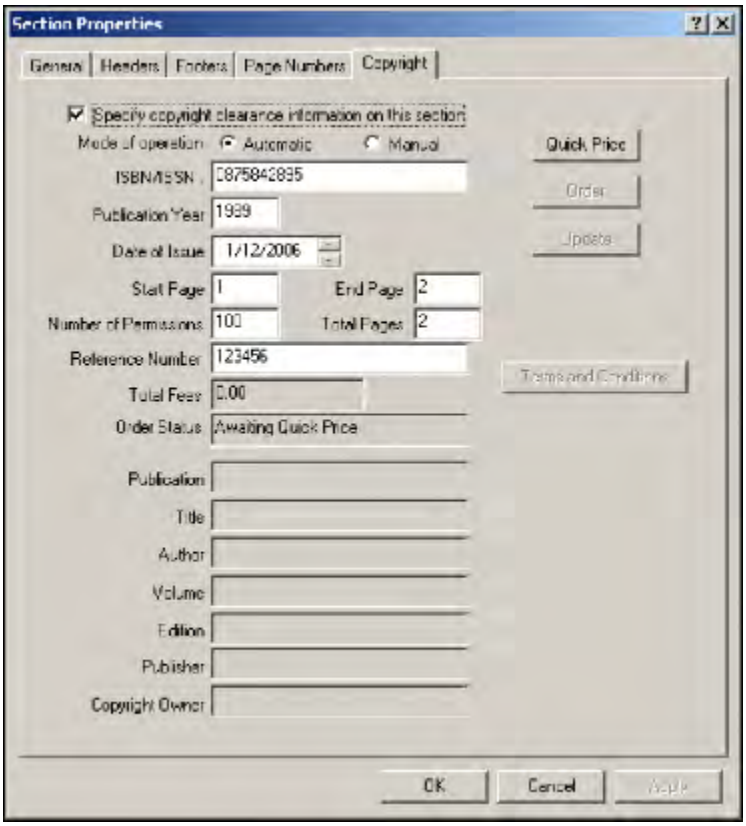
From the Makeready document display screen, select the first section in which copyright information will be added or managed, and follow the steps below. The user fields in this window are explained in detail at the end of this section.

1. Right-click on the **Section** icon, and select **Section Properties** from the drop-down.
2. Select the **Copyright** tab to display the Copyright properties for this section.
3. Mark the Specify copyright clearance information for this section check box, if not already marked.
4. Select **Automatic** as the Mode of Operation.

5. Enter the ISBN/ISSN number for this section.
6. Enter the Start Page and End Page numbers from the copyright material being managed. These page numbers correspond to the page numbers in the original copyrighted document.

   For example: Start Page 23, End Page 32. (These *do not* correspond to the page numbers in the Makeready document.)
7. Enter the Number of Permissions requested for this material.
8. Enter the Total Number of Pages for which the permissions *are being* requested.

   For example, for Start Page 1 and End *Page 2*, the Total Number of Pages is 2. This number of pages must be correct for Quick Price operation.
9. Proceed to Section Level Quick Price.



DEFINING SECTION PROPERTIES FOR MANUAL MODE

1. Right-click on the **Section** icon, and select **Section Properties** from the drop-down.
2. Select the **Copyright** tab to display the Copyright properties for this section.
3. Mark the Specify copyright clearance information for this section check box, if not already marked.
4. Select **Manual** as the Mode of Operation.
5. Enter the ISBN/ISSN number for this section and all other available information.

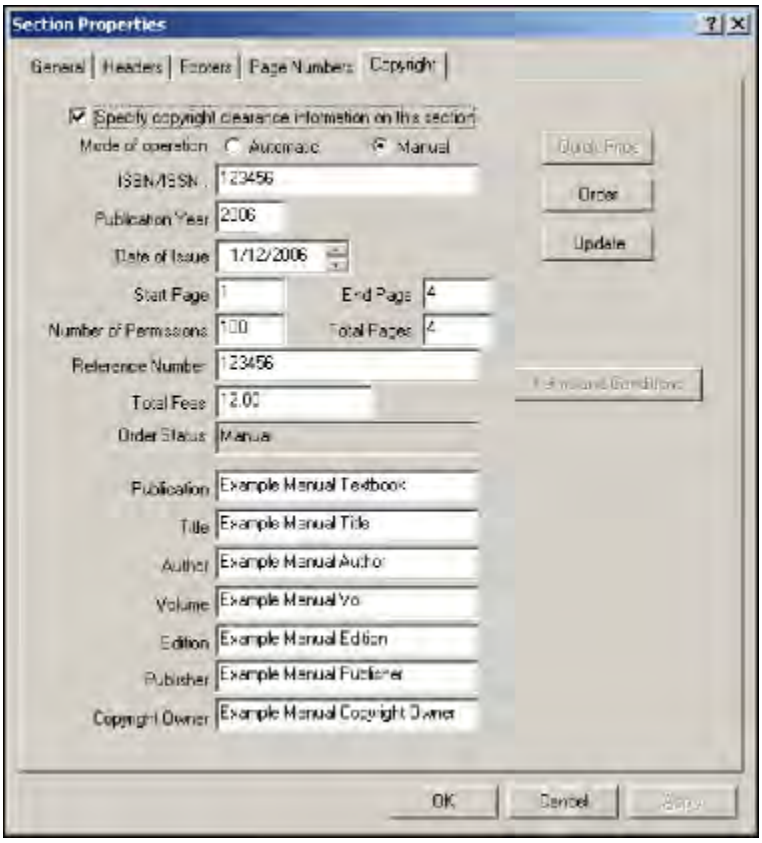
6. Enter the Start Page and End Page numbers from the copyright material being managed. These page numbers correspond to the page numbers in the original copyrighted document.

   For example: Start Page 23, End Page 32. (These do not correspond to the page numbers in the Makeready document.)

7. Enter the Number of Permissions requested for this material.
8. Enter the Total Number of Pages for which the permissions are being requested.

   For example: For Start Page 1 and End Page 2, the Total Number of Pages is two (2). This number must be correct for Quick Price operation.

9. Proceed to Order Copyright Permissions at the Section Level.



DEFINING SECTION PROPERTIES FOR RESEARCH ORDER MODE

1. Select the **Section** icon.
2. Right-click and select **Section Properties** from the drop-down.
3. Select the **Copyright** tab to display the Copyright properties for this section.
4. Mark the Specify copyright clearance information for this section check box, if not already marked.
5. Select **Automatic** as the Mode of Operation.
6. Enter the ISBN/ISSN number for this section and all other available information.

7. Enter the Start Page and End Page numbers from the copyright material being managed. These page numbers correspond to the page numbers in the original copyrighted document.

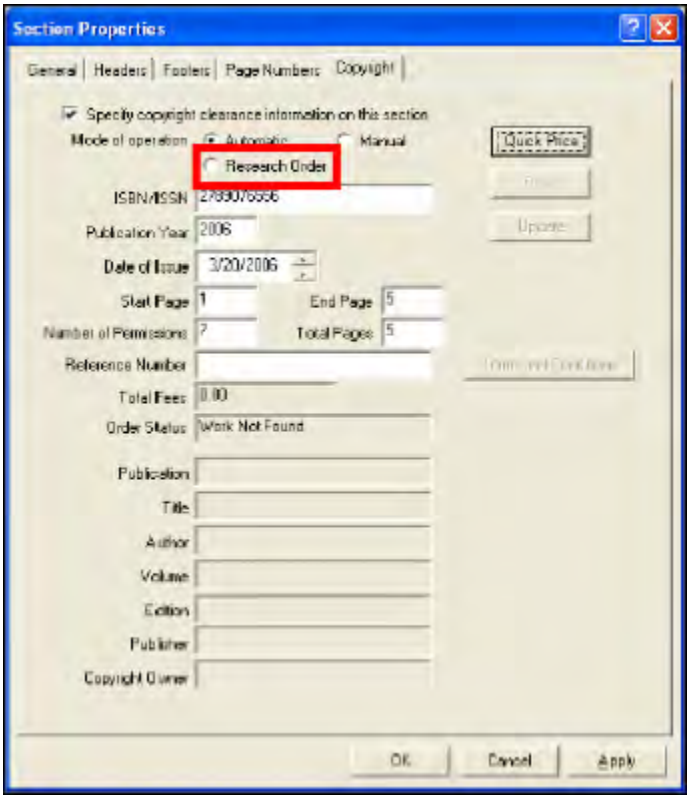
   For example:Start Page 23, End Page 32. (These do not correspond to the page numbers in the Makeready document.)

8. Enter the Number of Permissions requested for this material.
9. Enter the Total Number of Pages for which the permissions are being requested.

   For example: For Start Page 1 and End Page 2, the Total Number of Pages is two (2). This number must be correct for Quick Price value to be correct.

10. Proceed to Quick Price at the Section Level.

Note: If the Order Status is "Work Not Found" or, in rare instances, "Duplicate Works," then the Research Order radio button becomes available, as shown below.



11. If you wish to place an order with the CCC for this work, select Research Order (note that Quick Price is not available in this mode), provide values for as many fields as available, and proceed to Order Copyright.

SUMMARY OF REQUIRED FIELDS

The following table provides a summary of required fields in different ordering modes.

Field Name	Automatic Mode	Manual Mode	Research Order Mode
ISBN/ISSN	✓	✓ 1	✓1
Publication Year	✓	-	✓2
Date of Issue	3	-	3
Start Page	✓	✓	✓
End Page	✓	✓	✓
Number of Permissions	✓	✓	✓
Total Pages	✓	✓	✓
Reference Number	-	-	-
Total Fees	-	✓	-
Order Status	Generated Value		
Publication	Generated Value	-	✓
Title	Generated Value	-	-
Author	Generated Value	-	✓
Volume	Generated Value	-	-
Edition	Generated Value	-	-
Publisher	Generated Value	-	✓
Copyright Owner	Generated Value	-	-

Reference notes for required fields:

- The ISBN/ISSN value cannot be blank; if the information is not known, then dummy information should be used.
- The publication year must be between 1000 and 3000. Also, for some titles the copyright permission availability and price could depend on the year.
- The correct Date of Issue is important for serial publications such as newspapers, magazines, and journals, since the copyright permission availability and price could depend on this date.

SECTION LEVEL QUICKPRICE

Prior to an order being placed with the Copyright Clearance Center (CCC), the operator must request a Quick Price for the article. The Quick Price establishes whether the article is managed in the CCC database or in the public domain, or whether a more extensive search is required to obtain permission from the rights holder.

Select **Quick Price**. After a short period, the request sent to the CCC returns information about the requested material. Listed below are the possible return statuses for a Quick Price operation:

- **Granted**: Permissions are available for the work.
- **Denied**: Permissions are not available for the work and an order cannot be placed with the CCC.
- **Cancelled**: The request for permissions was cancelled from the copyright service.
- **Contact Rights Holder Directly**: The CCC cannot give permissions from the Rights holder, but the user can try directly.
- **Public Domain**: No permissions are required to reprint the work.
- **Special Order**: The CCC requires you to submit a special order prior to the CCC's contacting the Rightsholder.
- **Forwarded to Rights Holder**: The CCC has sent the rights request to the Rights holder.
- **Pending**: The CCC has not sent the rights request to the Rights holder yet.

ORDER COPYRIGHT PERMISSIONS AT THE SECTION LEVEL

If the Total Fees for the article and the Terms and Conditions returned via the Quick Price operation are acceptable, perform the following steps.

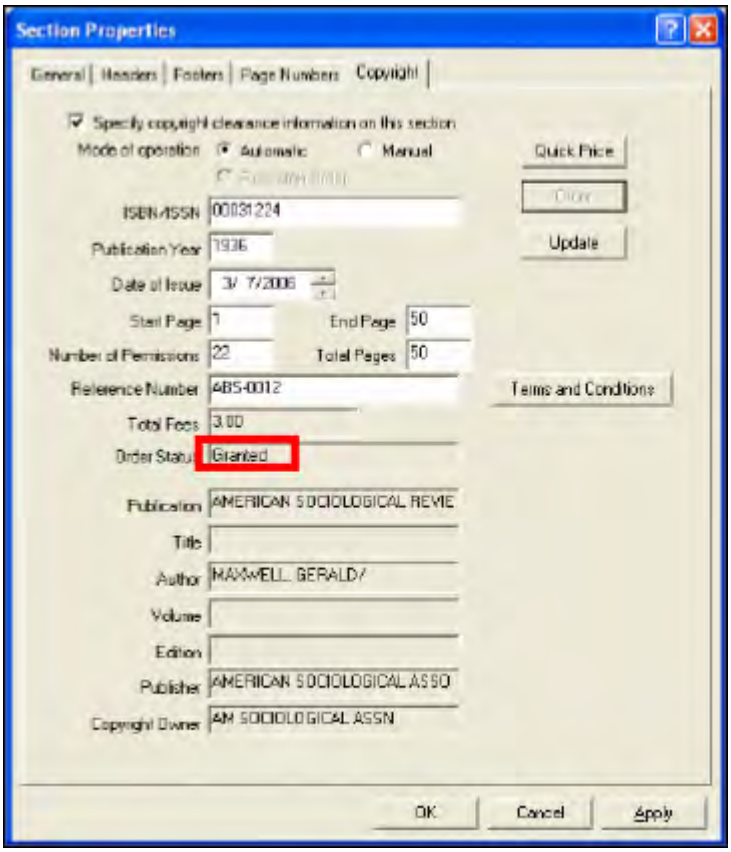
1. Select **Order**.
2. If the information returned or the Fees are not acceptable, select **Cancel**.

   No permissions will be granted.

With the Order Status of Ready to Order, the article may now be ordered from the Copyright Clearance Center.

1. Select **Order**.

   The screen below indicates the order was granted.



   You can make changes in this window. If a field is altered, the Order Status immediately changes to Awaiting Quick Price, and all buttons are grayed out. The operator must request a Quick Price to update the new information.

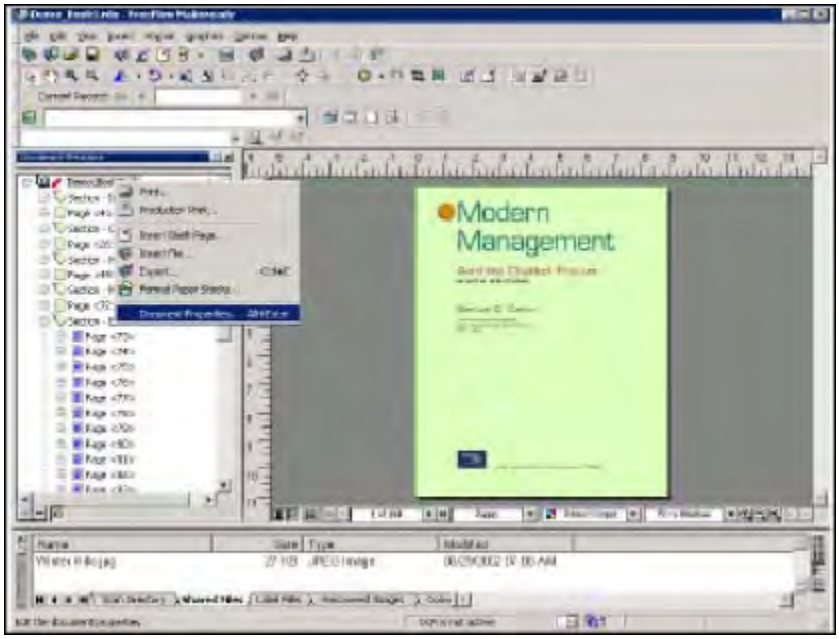
2. Complete the steps to order from the CCC.

   Note: If changes must be made on an existing "Granted," "Pending," or "Forwarded to Copyrights Holder" order, the current order must be cancelled from the CMS Administrator's UI. Otherwise, the existing order might remain in place and the CCC will invoice the same.

ORDER COPYRIGHT PERMISSIONS FROM DOCUMENT PROPERTIES

Copyright permissions can be ordered from the Document Properties level. When this is performed, all articles in the coursepack are submitted to the Copyright Clearance Center.

Note: If any section has an existing order that is "Granted," "Pending," or "Forwarded to Copyrights Holder," then such orders should be cancelled from the CMS Administrator UI. Right-click on the top level document icon in the Document Structure window in Makeready and Document Properties > Copyright Summary from the drop-down.



1. Select **Quick Price**.

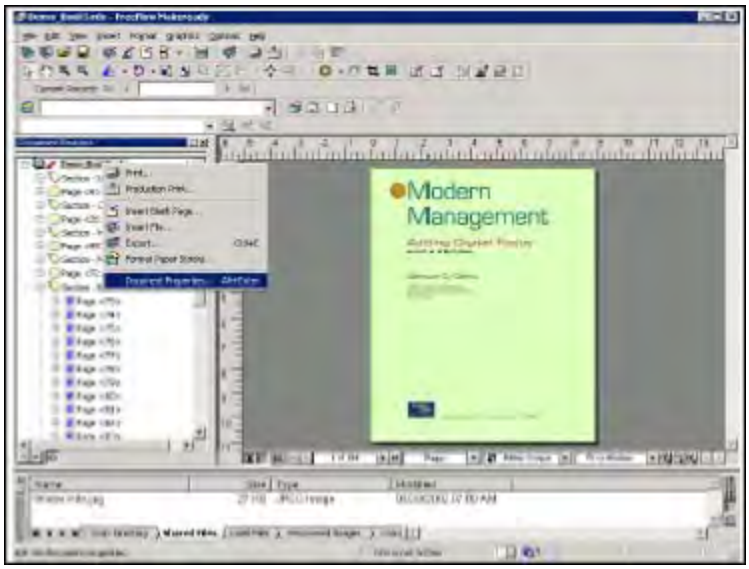
   The status for all articles is returned and displayed.

2. Select **OK**, and select **OK** again.

VIEWING THE CCC STANDARD TERMS AND CONDITIONS

You can view the Standard Terms and Conditions from the Document Properties screen. Follow the steps below to view the Copyright Clearance Center Standard Terms and Conditions.

1. Select the topmost icon in the Makeready Document Assembly screen.



2. Select **Document Properties**.
3. Select **Copyright Summary**.
4. Select **Standard T's & C's**.

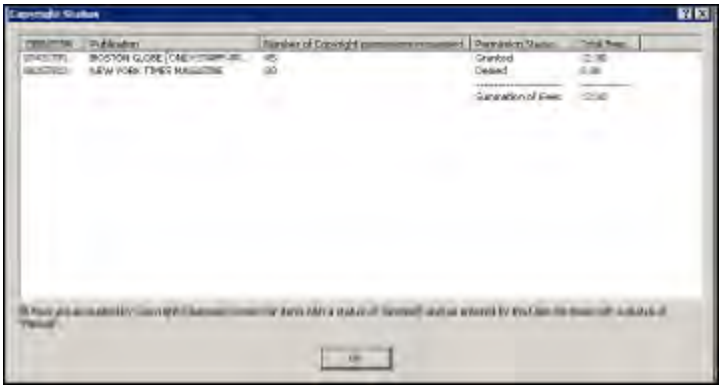
The following partial screen displays from the Copyright Clearance Center Internet site.

VIEWING SUMMARY COPYRIGHT INFORMATION

From the Document Properties Copyright Summary window:

1. Select**Summary**.

A screen displays the ISBN/ISSN, Publication, Number of Copyright Permissions Requested, Permission Status, and Total Price for each article. A Summation of Fees for all articles also displays. Articles not granted are not included in the Summary of Fees.



SAVING A DOCUMENT THAT HAS COPYRIGHT INFORMATION

- **Save As** duplicates all the images and copyright details at the section and document levels, but all order information is removed and the document is at a pre-quick price state.
- **Save** retains all information for the document, including the order information.

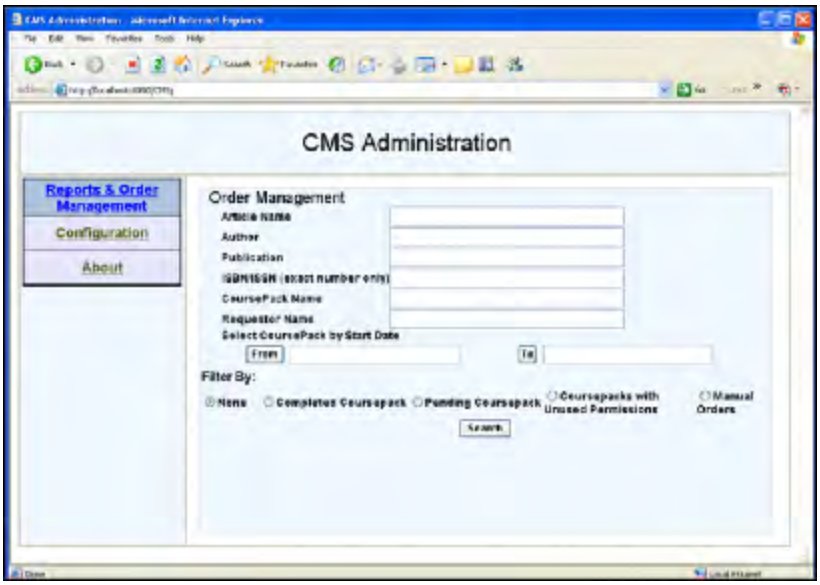
Copyright Management Service Admin Application & Copyright Management Service Search Application

Copyright Management Service Admin Application

Use the Xerox Copyright Management Service (CMS) software to manage the copyright permissions ordered through Makeready.

The URL to start a CMS admin UI is http://localhost:8090/CMS/CMSAdmin.aspx or http://127.0.0.1:8090/CMS/CMSAdmin.aspx.

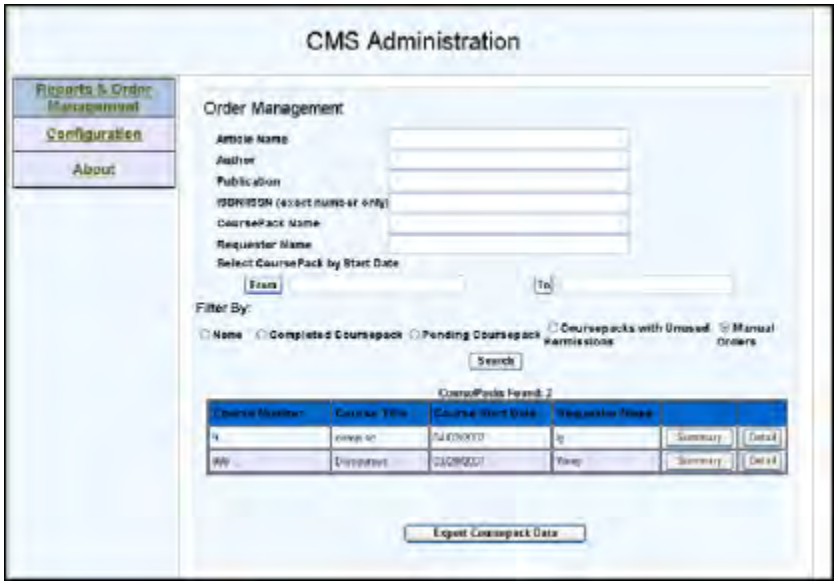
As installed and by design, for better security, this page is available only on the CMS Server machine.



Reports

SEARCHING

1. Select **Reports and Order Management** from the Copyright Management Service
2. Select the appropriate search criteria:
   - **Article Name**: Type in the title of the section and the search will return all coursepacks that have sections with that title. Note that the Makeready Section Title represents an Article Title that has copyright information associated with it. You may enter a part of the Article name.
   - **Author**: Type in the author's name and the search will return all coursepacks that have sections with that author name. You may enter a part of the Author's name.
   - **Publication**: Type in the publication name and the search will return all coursepacks that have sections with that publication name. You may enter a part of the Publication name.
   - **ISBN/ISSN**: Type in the ISBN/ISSN and the search will return all coursepacks that have sections with that ISBN/ISSN number. The ISBN search is an *exact* match, so input the complete ISBN/ISSN value.
   - **Coursepack Name**: Type in the title of the coursepack and the search will return all coursepacks with that name. You may enter a part of the Coursepack name.
   - **Requestor Name**: Type in the requestor's name and the search will return all coursepacks with that requestor's name. You may enter part of the Requestor name.
   - **Start Date Range**: Type in the range of dates for start dates and the search will return all coursepacks that have a start date in the specified range. If you click on the "From" or "To" buttons,a calendar box appears.
   - **No Search Criteria**: Returns all coursepacks in the Copyright Management Service that match the search criteria specified, if any.
3. If no criteria are selected, all coursepacks in the system are returned unless limited by the filter (refer to the Filtering the Search).
4. Select **Search**.



FILTERING THE SEARCH

1. Select **Reports & Order Management** from the Copyright Management Service.
2. Select the appropriate search criteria.
3. Determine the filter to limit the search to only coursepacks that meet the filtering criteria.
   - **Completed Coursepacks** - Limits the search to coursepacks that have been ordered and for which all copyright sections have final order status (Granted or Denied or Manual Order).
   - **Pending Coursepacks** - Limits the search to coursepacks that have sections whose permissions have been ordered but that are not yet granted or denied by the CCC.
   - **Coursepacks with unused permissions** - Limits the search to coursepacks that have sections that were ordered but for which not all the copyrights permission have been used up.
   - **Manual** - Limits the search to coursepacks for which permissions has been acquired manually.
   - **None** - Does not limit the search and all coursepacks, based on search criteria, are returned
4. Select **Search**.

EXPORTING COURSEPACK INFORMATION

1. Select **Reports & Order Management** on Copyright Management Service.
2. Search for the appropriate Coursepack(s). The search returns a selection of coursepacks.
3. Select **Export Coursepack Data**, and all copyright information associated with those coursepacks is placed in the xml format and exported. The choices for displaying the exported data are limited to the formats supported by the software on that workstation. If all software is available on that workstation, then the format choice is Microsoft Excel 2003 format, which displays the exported coursepack data in an Excel sheet. The exported xml file can also be opened with a browser (Microsoft Internet Explorer or Netscape Navigator).

VIEWING COURSEPACK SUMMARY

1. Select **Reports & Order Management** on Copyright Management Service.
2. Search for the appropriate Coursepack. The search returns a selection of coursepacks.
3. Select the **Summary** button, and the coursepack summary displays the following information. See the Appendix for a description of the fields.
   - Course Title
   - Course Number
   - Course Start Date
   - Requestor Name

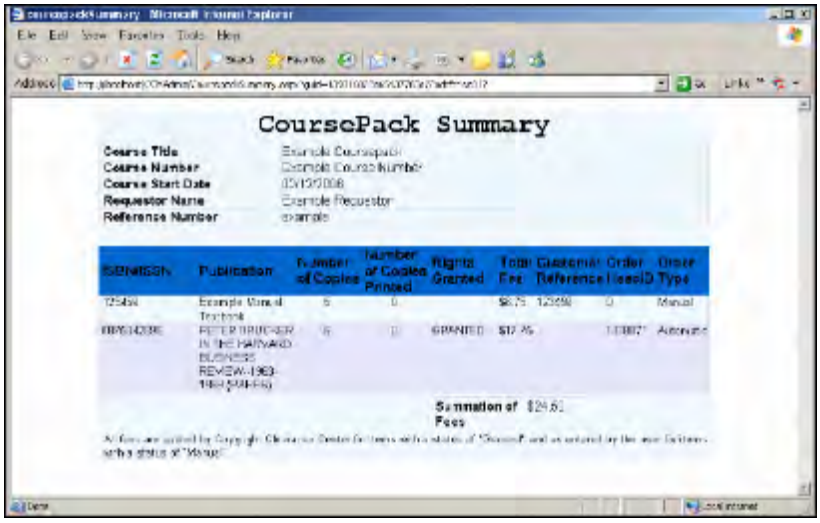
- Reference Number

Then for each *active* section associated with this coursepack, the following information is provided. See the Appendix for description of the fields.

- ISBN/ISSN number
- Publication
- Number of copies
- Number of copies printed
- Rights Granted
- Total Fee
- Customer Reference Number
- Order Head ID this is the number that the CCC provides when an order is placed with them
- Order Type

A summation of the fees is provided. This number is a simple addition of the fees provided by the user for the manual orders and the fees provided by Copyright Clearance Center for the Automatic and Research Orders.

Note that the Summary displays only *active* sections. A section is *active* unless it is marked "Deleted."



VIEWING COURSEPACK DATA

1. Select **Reports & Order Management** on Copyright Management Service.
2. Search for the appropriate coursepack. The search returns a selection of coursepacks.
3. For the coursepack of interest, select **Details**. The following information displays for all (active as well as deleted) sections in the coursepack:
    - Course Title
    - Course Number
    - Course Start Date
    - Requestor Name
    - Requestor Phone
    - Requestor Email
    - Organization
    - Department
    - Comment
    - Operator name
    - Reference Number
    - Status
    - Creation Date
    - Modification Date

Section Details: The following information is provided for each section in the document.

- Record Status
- Rights Granted
- Order Type
- Order Status
- Customer Reference
- ISBN/ISSN number
- Article Name
- Publication Title
- Publisher
- Publication Year
- Author
- Date of Issue
- Volume number
- Edition

- Total Pages
- Start page
- End Page
- Order Placed Date
- Order Completed Date
- Creation Date
- Modification Date
- Order Head ID
- Order Detail ID
- Rights holder
- Terms and Conditions
- Number of copies ordered
- Number of copies printed
- Last Printing Date
- Total Fee
- Cancellation Fee

Order Management

The coursepack covers the modification to the number of permissions and the ability to delete the coursepack.

MODIFY THE NUMBER OF PERMISSIONS FOR A COURSEPACK

1. Select **Reports & Order Management** on Copyright Management Service.
2. Search for the appropriate Coursepack. The search returns a selection of coursepacks.
3. For the coursepack of interest, select **Details,** and then select **Modify Permissions**.
4. Enter the number of permissions that represents the total number of permissions required. For example, there is a coursepack with 10 permissions currently. However, if 10 more permission is needed for this coursepack, enter 20, since the new total number of permissions required is 20.

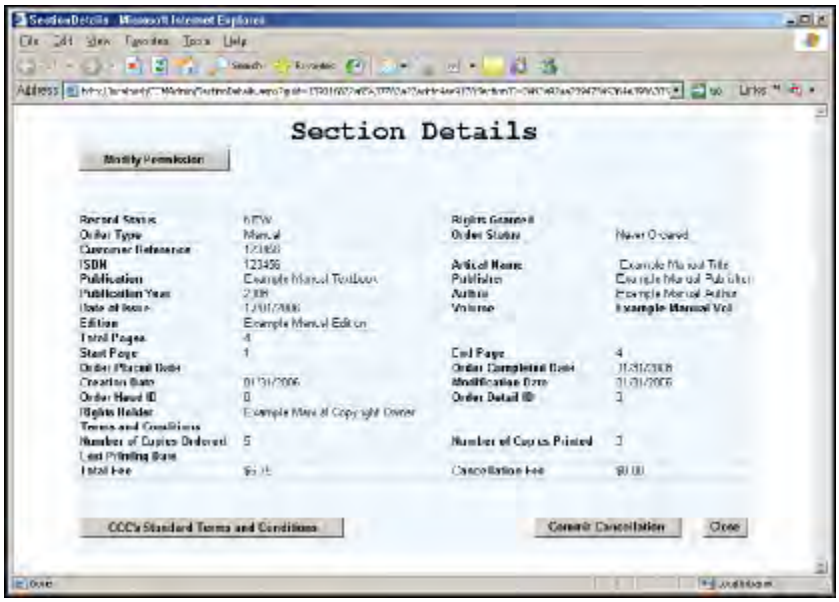
   Note: The modification is attempted only for the "active" section with order type "Automatic" or "Research Order." Please modify each section with order type "Manual Order" individually from the "Section Details" screen.

5. The results of permission modification display as three different segments:
   - **Success**: Indicates the Publication name of each section for which permission has been modified successfully.
   - **Manual Order**: Indicates the Publication of each section for which the order type is manual order.
   - **Error**: Indicates the Publication of each section for which permission modification failed.

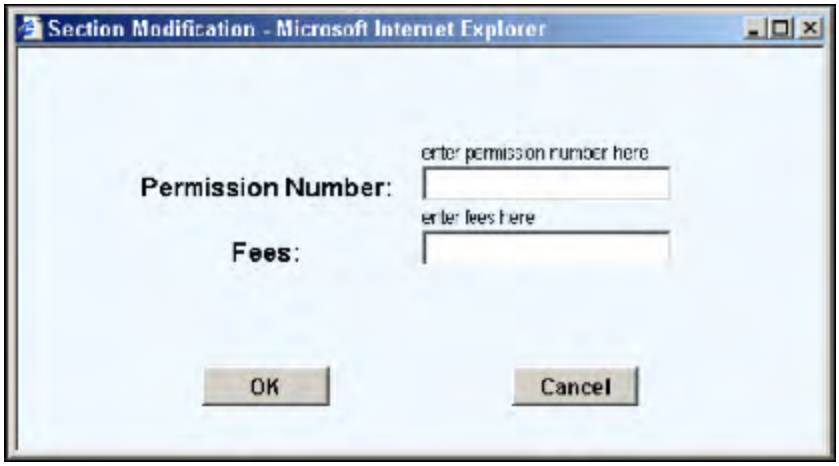
The modification may fail for one of the following reasons:

- The section being modified was cancelled by the CCC. This is different from a section being cancelled and marked deleted on the CMS UI. In the latter case, the modification is never attempted.
- The section being modified was invoiced by the CCC. An Invoiced section cannot be modified for number of permissions from the CMS UI. Work directly with CCC.

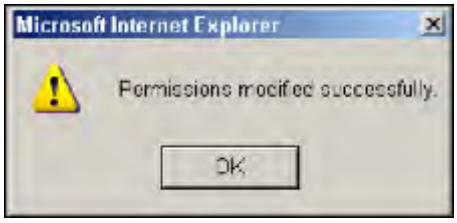
6. After you select **OK**, the display updates to show the updated Number of Copies and updated Total Fee.
7. For all manual orders, modify permission at each individual section.
8. Select **Modify Section** at each section detail for which the order type is a manual order.



9. Select **Modify Permission** at section details, and enter the permission number and fees. Select **OK**.



10. If the operation is successful, the following message displays. Select **OK**.

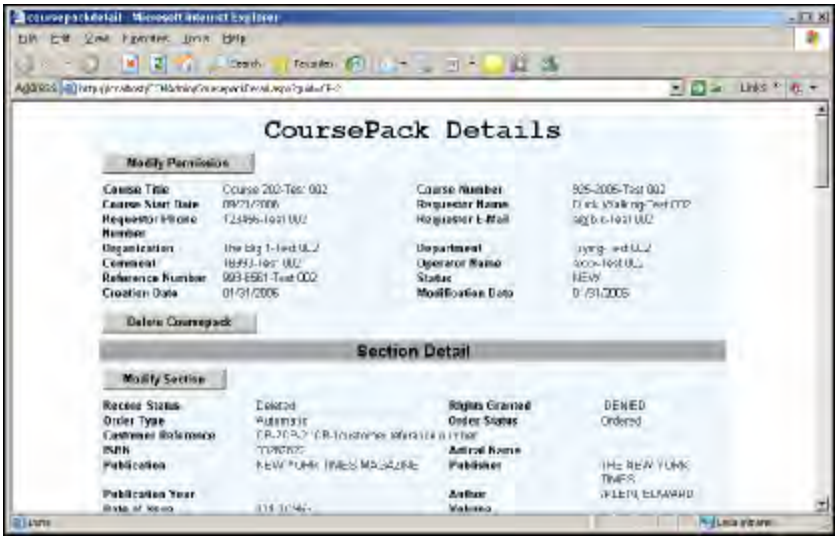


The Section Details page is updated and will show the updated values for Number of Copies and Total Fee.

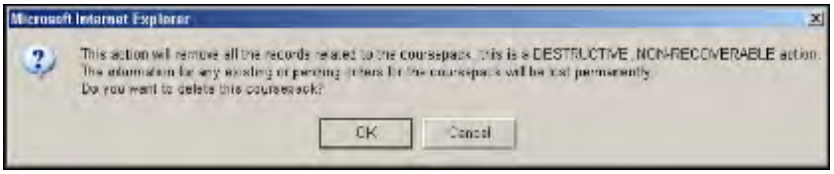
DELETE A COURSEPACK

A **Delete Coursepack** function is enabled only if every section in the coursepack is marked as deleted.

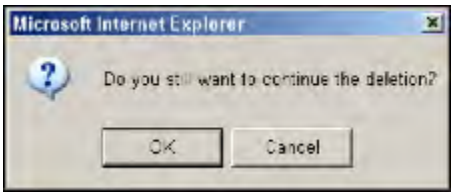
1. Select **Reports & Order Management** on Copyright Management Service.
2. Search for the appropriate coursepack. The search returns a selection of coursepacks.
3. On the coursepack of interest, select **Details.**
4. On the Coursepack Details Screen, select **Delete Coursepack.**



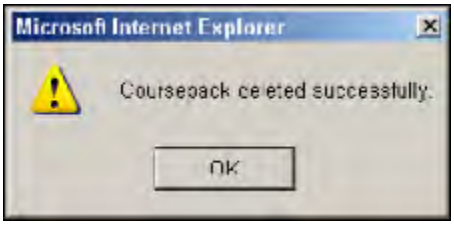
Caution: The Delete Coursepack option is a DESTRUCTIVE and NON-RECOVERABLE action; therefore, a warning message displays when you select the Delete Coursepack button. Further, you may have an RDO that is referring to the CMS server for its order data. Use the Delete Coursepack function with extreme care.



A further confirmation message displays for final confirmation of coursepack deletion.

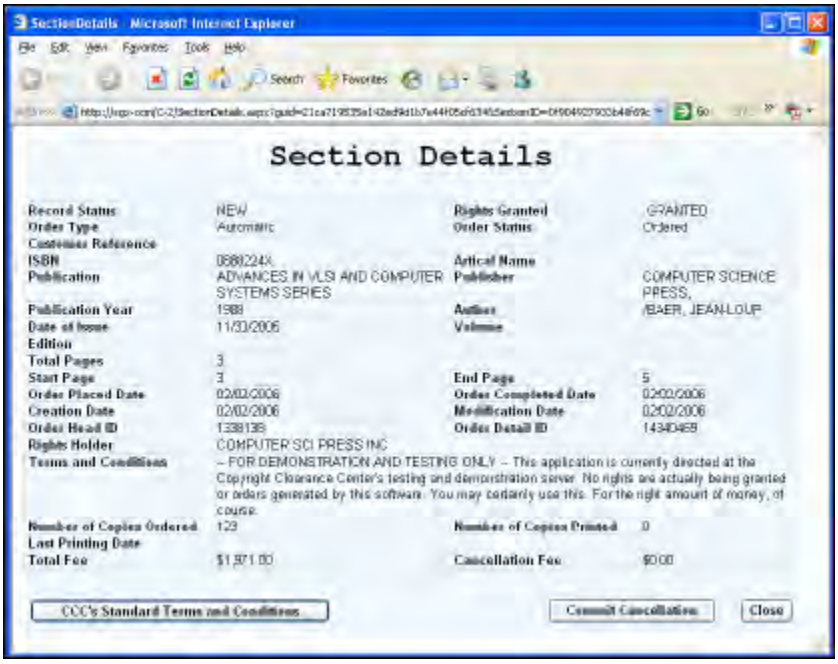


Finally, the result of coursepack deletion displays.



CANCEL THE ORDER FOR A SECTION OF THE COURSEPACK

1. Select **Reports & Order Management** on Copyright Management Service.
2. Search for the appropriate coursepack. The search returns a selection of coursepacks.
3. On the coursepack of interest, select Details.
4. On the Section Details Screen, select the section of interest. For that section,select Modify Section.



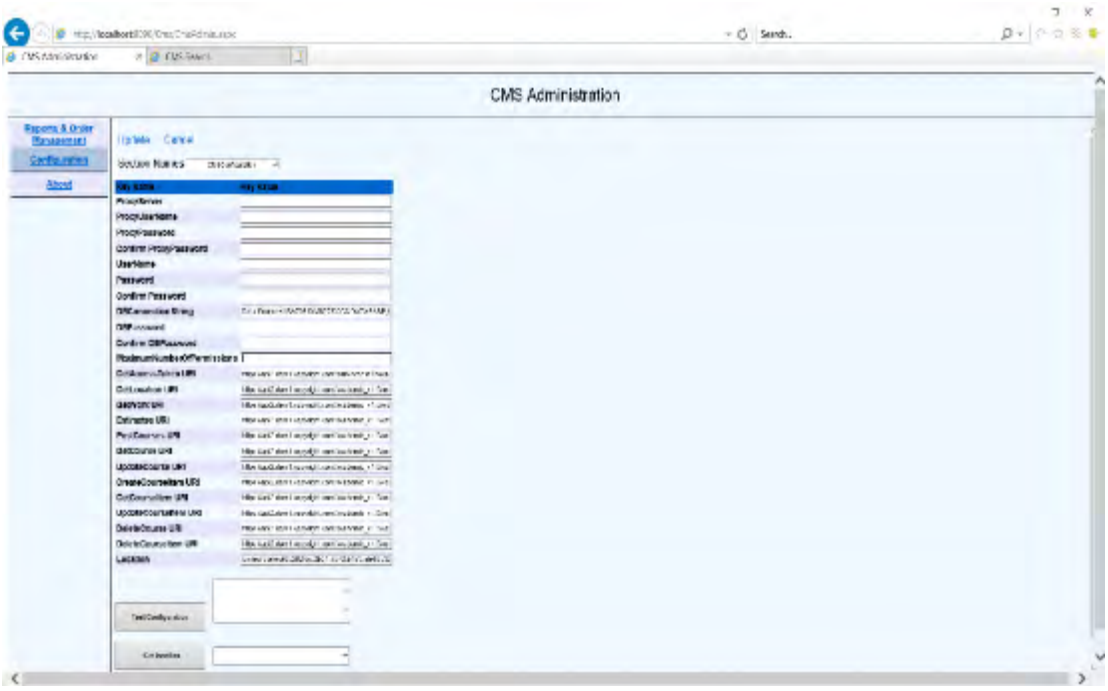
5. Select **Commit Cancellation** to cancel the permissions that were ordered.
6. Select **OK**.

The display updates the section detail that has been cancelled.

Note: If the order has been invoiced, then it cannot be cancelled.

CMS CONFIGURATION

The Configuration page allows you to view or update various application settings. The configurations are divided into three sections. Select the Configuration link. The following window displays.



CMS CONFIGURATION SECTION

In the **Section Names** drop-down, select CMSConfiguration. A set of Key Names and Key Values appear and can be configured.

- **ProxyServer**: If your organization requires you to use a "Proxy" for internet connection, you must provide either the IP address or the URI for the ProxyServer and its port number. An example value would be 13:1.1.23:8000.
- **ProxyUserName**: Proxy user's login ID, if required.
- **ProxyPassword**: Proxy user's proxy password, if required.
- **Confirm ProxyPassword**: Re-enter Proxy user's proxypassword for confirmation.
- **UserName**: Your organization's login ID for the CCC's account under which all the copyrights order will be placed. Without a correct value for this username and password, you will not be able to place any orders successfully.
- **Password**: Your organization's login password for the CCC account.
- **Confirm Password**: Reenter your organization's login password for the CCC account for confirmation.
- **DBConnection String**: This is for connection to the Database server. After a successful installation, this value should Not be changed.
- **DBPassword**: This is for connection to the Database server. After a successful installation, this value should Not be changed.

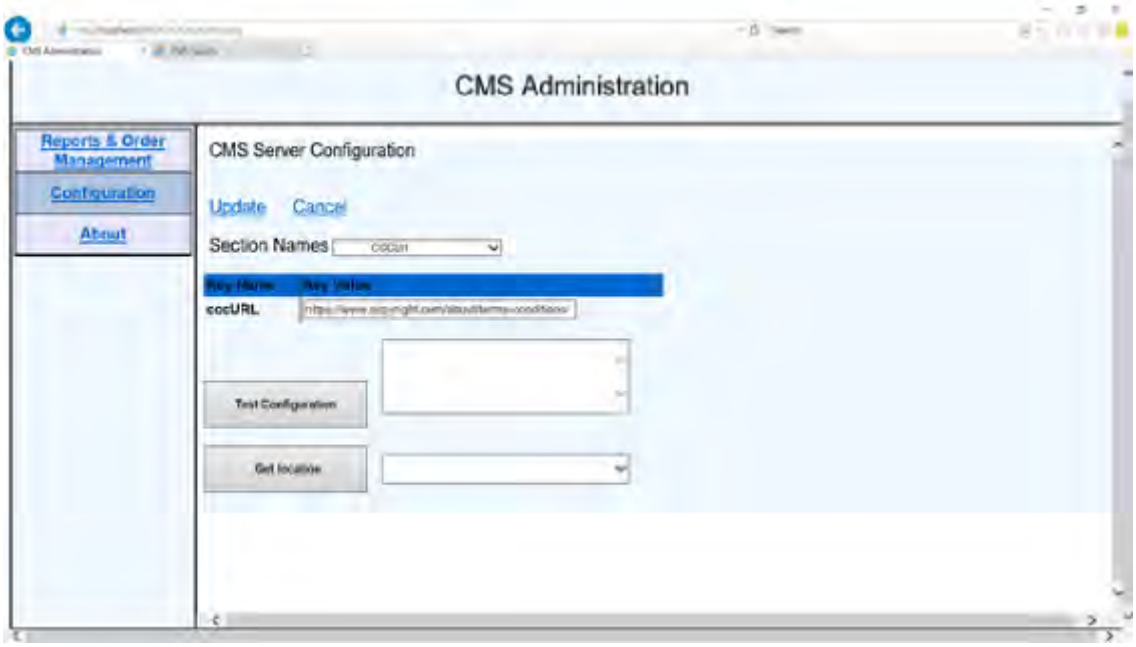
- **Confirm DBPassword**: This is for connection to the Database server. After a successful installation, this value should Not be changed.
- **MaximumNumberOfPermissions**: This value is used to validate the maximum number allowed when updating an existing order (Granted, Pending,or Forwarded to Rights Holder).The CCC limits this value to 99999, but a site may want to limit this to an even lower value. However,if the value specified here is greater than 99999, then the CCC limit is observed.
- **GetAccessToken URI**: The URI of the Copyright Clearance Center Academic API that is provided by the CCC to fetch Access Token. All methods in CCC's Academic API need a valid token in order to access them.
- **GetLocation URI**: The URI of the Copyright Clearance Center Academic API that retrieves all locations associated with a specific organization.
- **GetWork URI**: The URI of the Copyright Clearance Center Academic API to retrieve works and rights information.
- **Estimates URI**: The URI of the Copyright Clearance Center Academic API to request the price for the specified work, publication year, right ("product"), number of pages, and number of copies.
- **PostCourses URI**: The URI of the Copyright Clearance Center Academic API to create a new Course.
- **GetCourse URI**: The URI of the Copyright Clearance Center Academic API to retrieve an existing Course.
- **UpdateCourse URI** : The URI of the Copyright Clearance Center Academic API to modify an existing Course.
- **CreateCourseItem URI** : The URI of the Copyright Clearance Center Academic API to create a new Course Item.
- **GetCourseItem URI** : The URI of the Copyright Clearance Center Academic API to retrieve an existing Course Item.
- **UpdateCourseItem URI** : The URI of the Copyright Clearance Center Academic API to update an existing Course Item.
- **DeleteCourse URI** :The URI of the Copyright Clearance Center Academic API to delete an existing Course.
- **DeleteCourseItem URI** : The URI of the Copyright Clearance Center Academic API to delete an existing Course Item.
- **Location**: This displays the Location selected from the list of Locations retrieved by clicking the Get Location button. CCC uses this location to determine the available rights for a work.

After you have changed the **Key Value** field, click **Update** . The new configuration will be updated to application.

Note: The passwords are never displayed on this page.

CCCURL CONFIGURATION

Select **cccURL** from the **Section Names** drop-down. The current values displays. You can change the URL and select Update to save the new URL. This URL is for the CCC's standard terms and conditions under which they grant the permission for copyrighted material. It is recommended that your authorized users review the terms and conditions as appropriate.

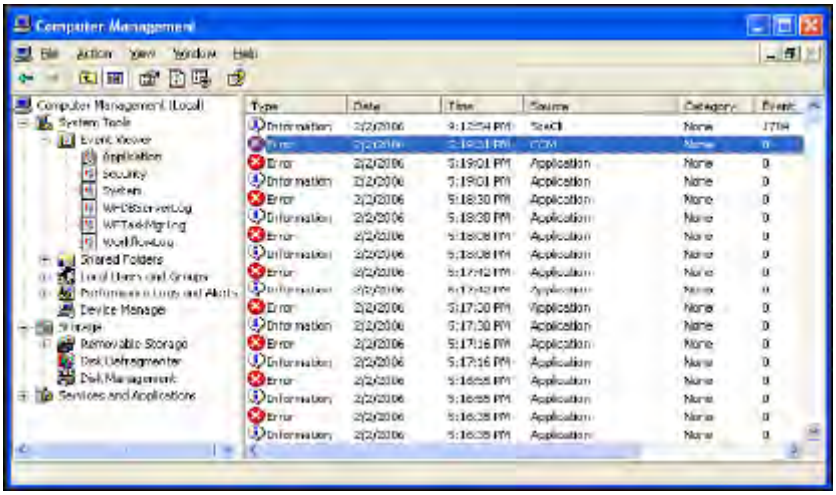


CMSLOGGING CONFIGURATION

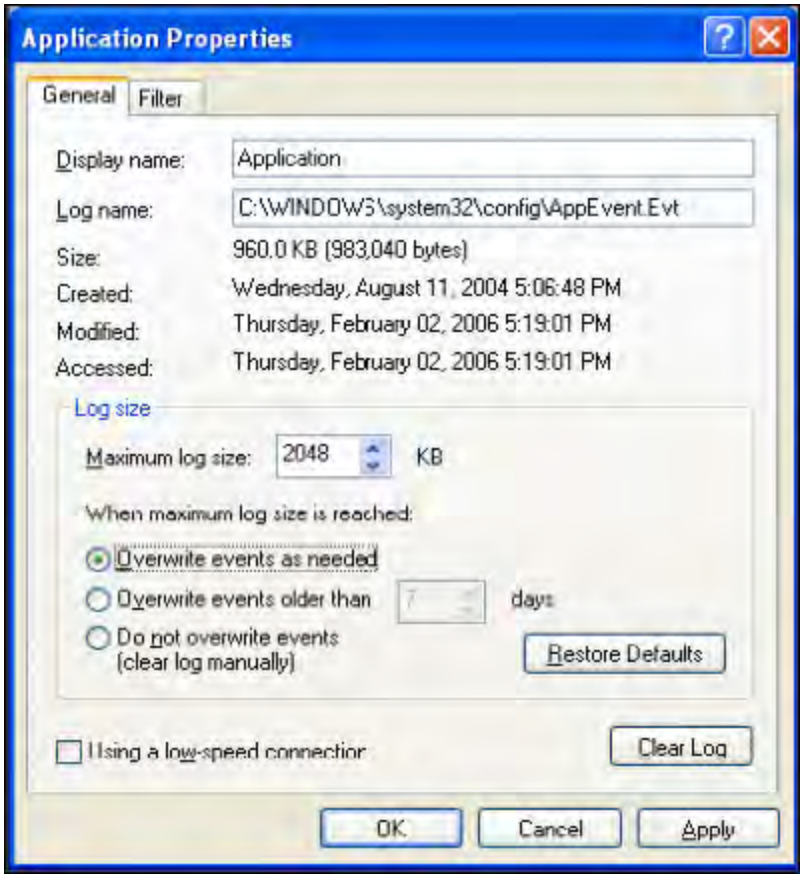
Select **CMSLogging** from the **Section Names** drop-down. The following Key Names and Key Values display and can be configured.

- **PendingOrderActivityLogPath**: Location in which the CCMOrder.exe saves a log of pending order activity. It should be the same as where the CMS software has been installed. An example value would be **d:\Xerox \FreeFlow\cmsLogs**.
- LogLevel: The log level may be set to 1, 2, or 3. Any other number stops the logging of CMS messages.
- For Error messages to be logged in the windows Application Log, set the LogLevel to 1.
- For Error messages and Warnings to be logged in the windows Application Log, set the LogLevel to **2**.
- For Error messages, Warnings, and Information messages to be logged in the windows Application Log, set the LogLevel to **3**.
- If you do not want to log any messages in the Application Log, set the LogLevel to a value other than 1, 2, or 3.

After setting the new value, select **Update** to save the changes. The messages are logged to Windows Event logs under the group "Application" and Source "CCM," as shown below.



It is recommended that the event "Log Size" be configured to be at least 1024 KB and that the property "When maximum log size is reached" is set to "Overwrite events as needed", as shown below.



TEST CONFIGURATION

The Test Configuration button allows you to test the system connection before or after the configuration is done. The test results are displayed in the window shown below.

The test currently checks only whether an internet connection exists and works with the CCC's catalog gateway.

This test does not check if the CCC Username and Passwords are correct. The status of connection to the CMS server, connection to the CCC server, connection to the database, and IIS and web server are displayed.

If you do not have the web server (IIS) running, you can perform the connectivity test by running cms_SysCheck.exe, which can be found where the CMS software is installed.

GET LOCATION

The Get Locations button will return all locations configured with CCC for your organization from which you can select one location which would be used while determining the available rights for a work.

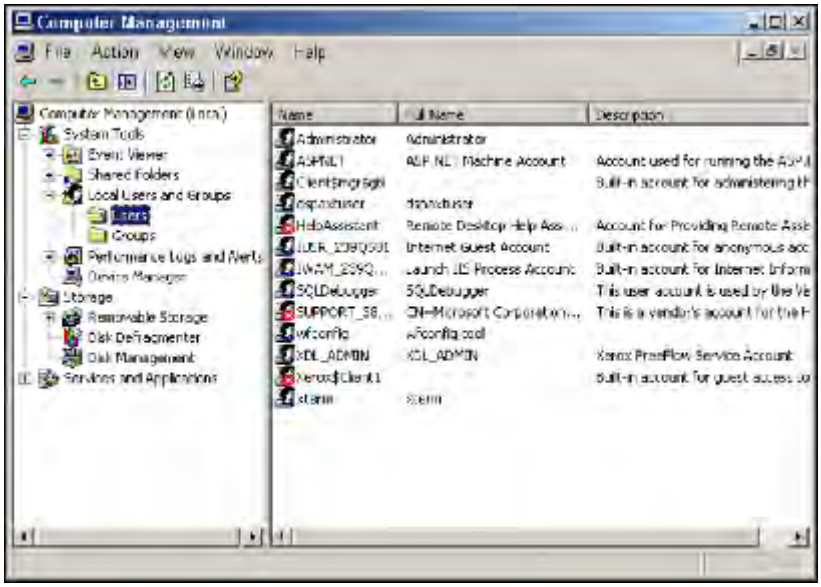
Copyright Management ServiceSearch Application (New for FF 6.0)

WORKING WITH CMS SEARCH

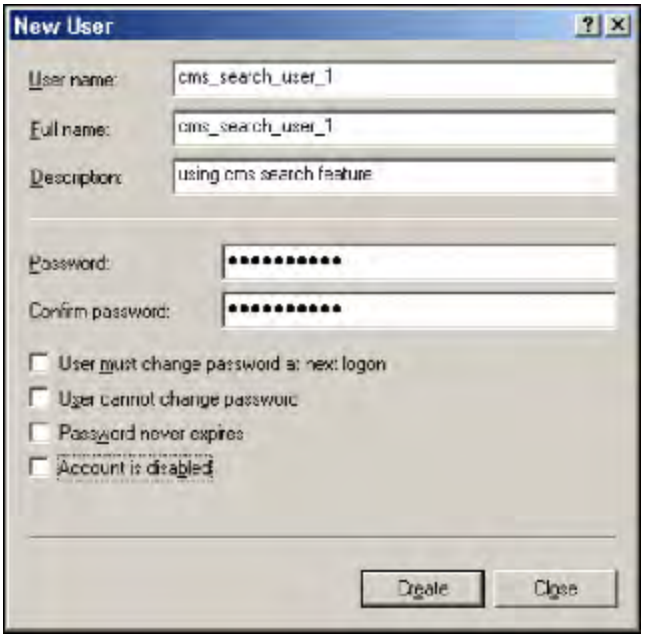
CMS Search application can be accessed for all users who are member of the group "**Xerox FreeFlow Copyright Management Service Search Users**", CMS administrator can add user to this group by using windows standard users and groups management facilities.

The group "**Xerox FreeFlow Copyright Management Service Search Users**" is created after the CMS server installed, the CMS administrator can add users to this group by following these steps.

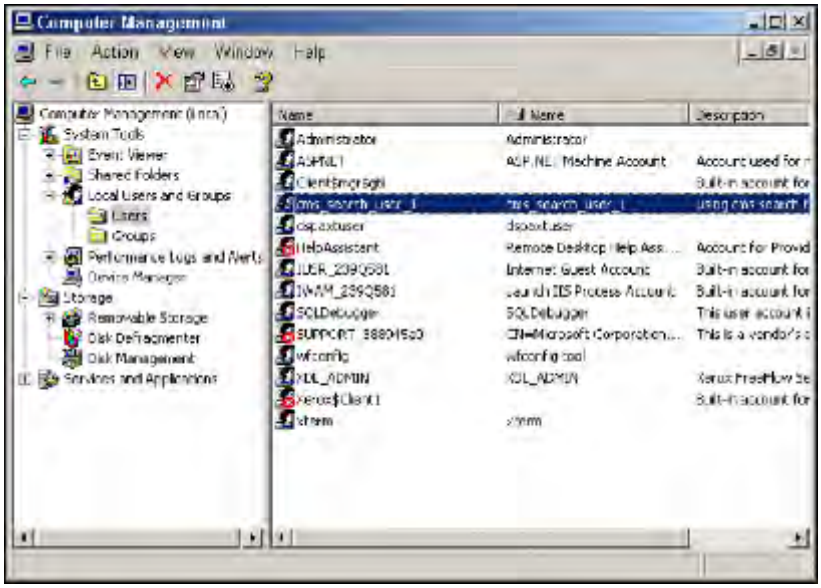
1. Right-click on the **My Computer** icon on the desktop.
2. Select Manage from the dropdown. The **Computer Management** window opens.
3. In the left pane, navigate to local **Computer Management > System Tools > Local Users and Groups> Users**, as shown below.



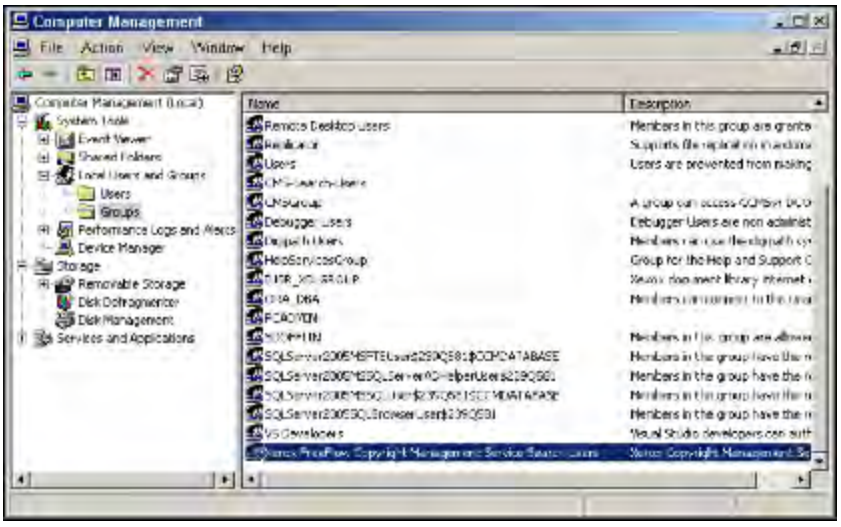
4. Right click **Users**, select **New User**, the **New User** window pops up, enter all user information in the text boxes as shown below.



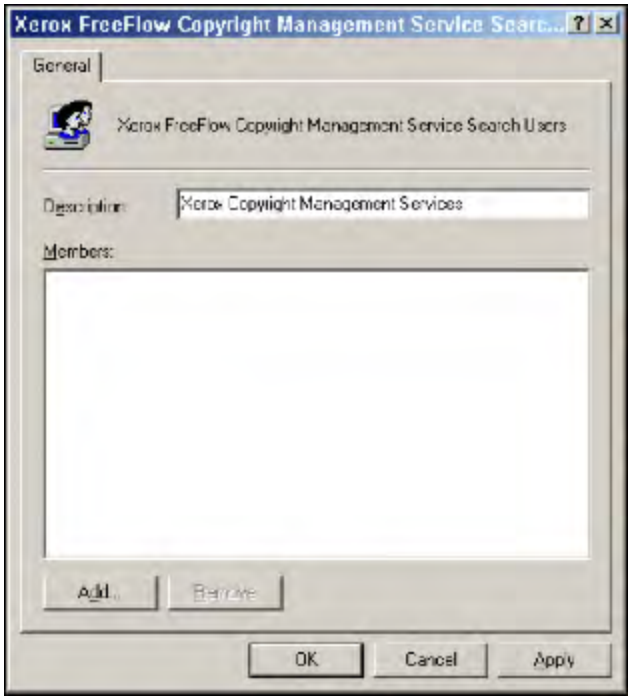
5. Click **Create** button, the created user will be shown at users list,see following window.



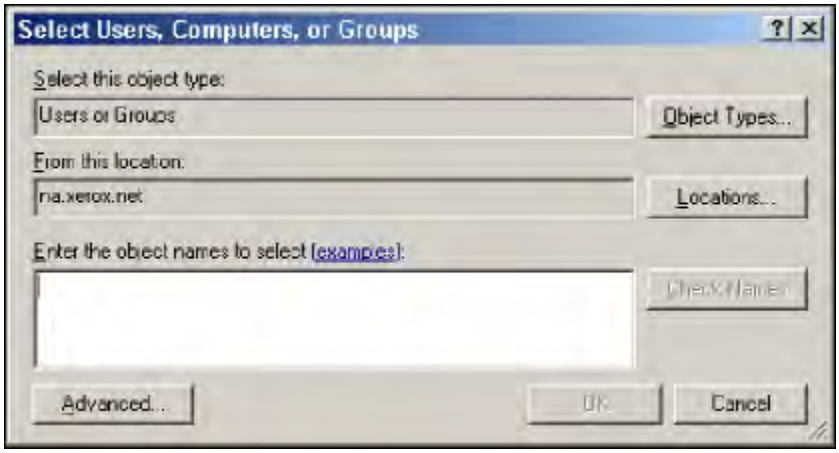
6. Double click **Groups** to see all groups.



7. Right click group **Xerox FreeFlow Copyright Management Service Search Users**, select **Add to Group**, the following window shows up.

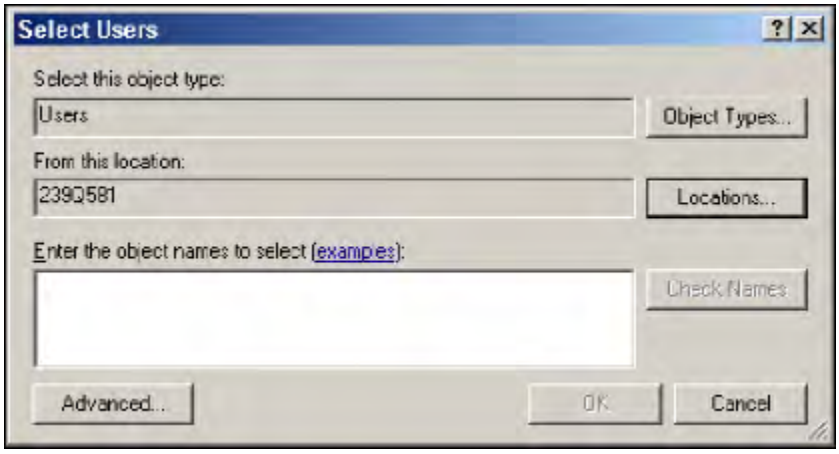


8. Click **Add** button, the **Select Users, Computers, or Groups** window shows up.

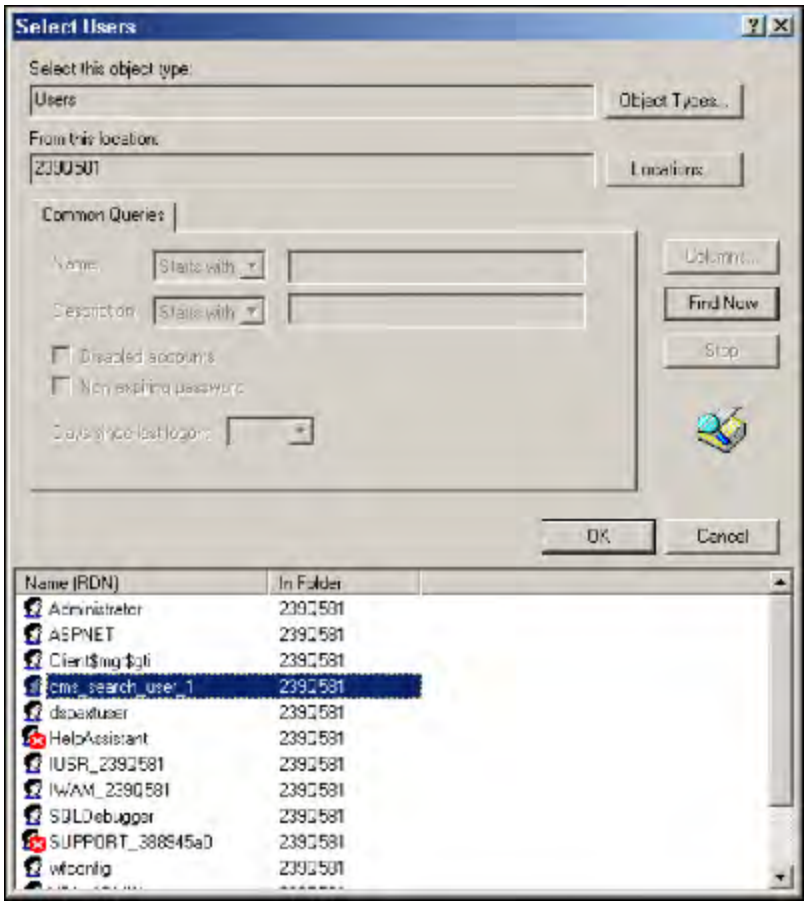


9. Click **Object Type** button, select **Users**, and click **OK**.

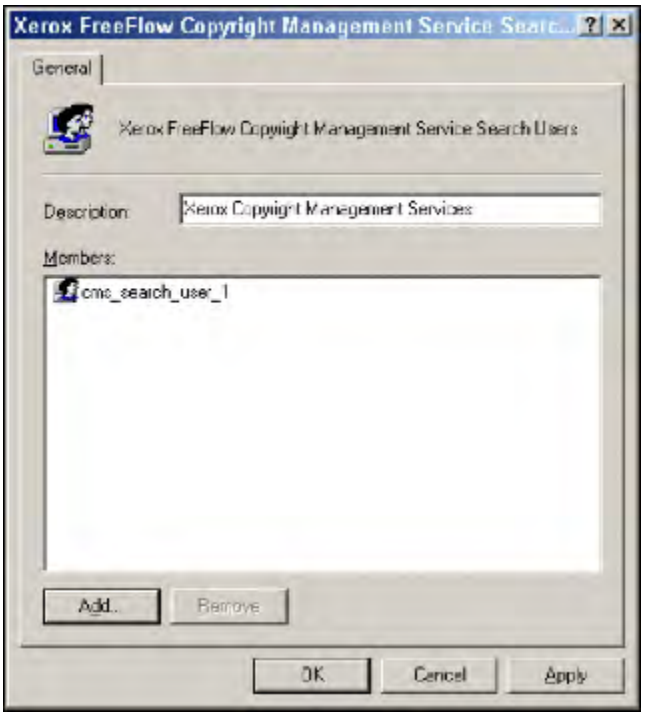
10. Click **Locations** button to select the location where user created.



11. Click **Advanced** button, and click **Find Now** button, highlight the user you want to add to the group. See following window.



12. Click **OK** button, you will see the user is added to the group.

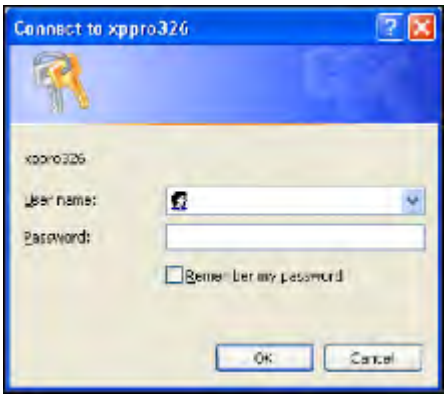


13. Click **Apply** and **OK**, to close this window. Close all the windows of **Computer Management.**

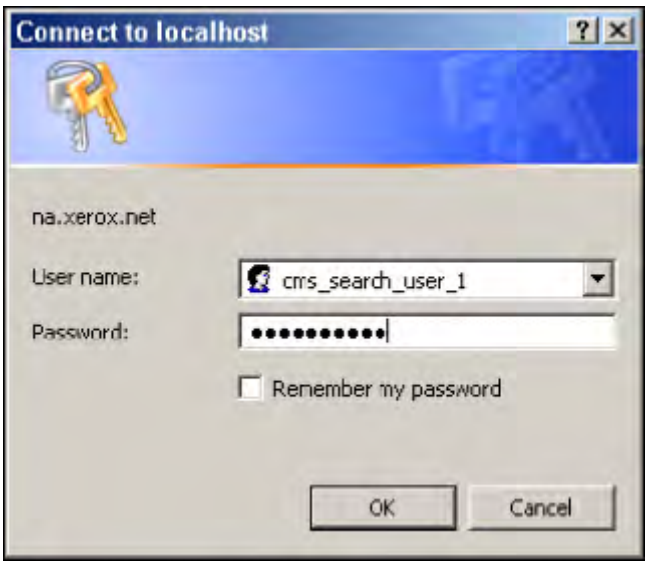
    A user is added to Xerox FreeFlow Copyright Management Service Search Users group now.

14. Launch the CMS search application URL **http://<Server-IP>:port/CMSSearch/CMSSearch.aspx**.

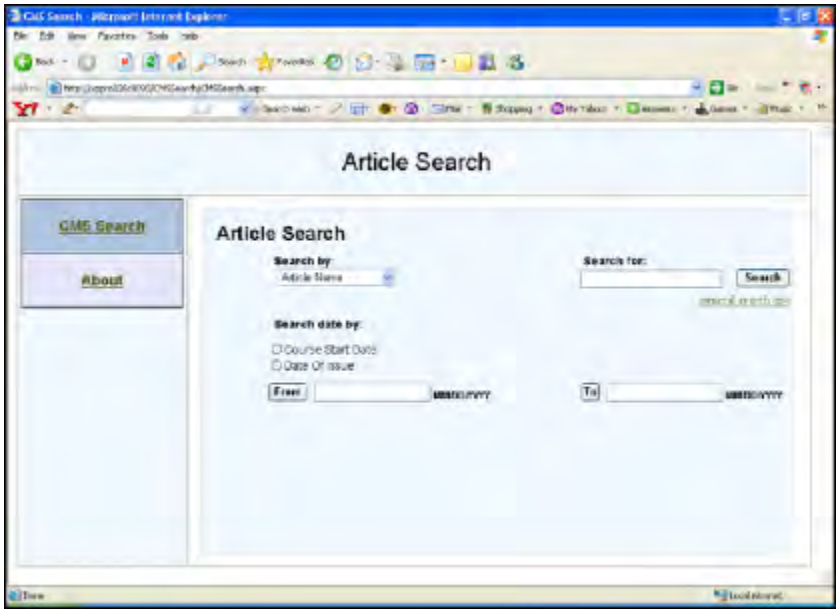
    The user will be asked for the authentication.



15. Provide the username/password of the user belonging to '**Xerox FreeFlow Copyright Management Service Search Users ' Group**. Such as above example.

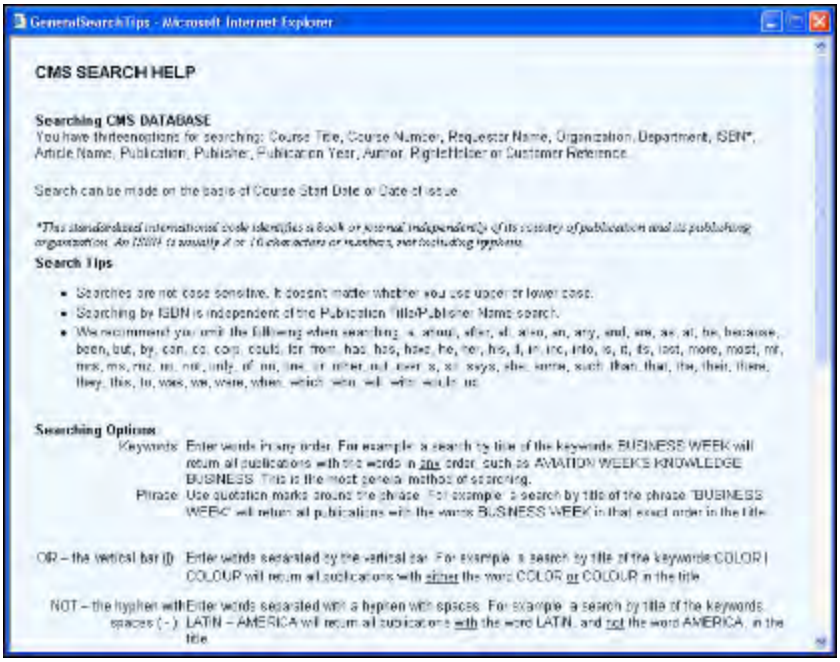


After valid authentication user will go to main search screen.


Article Search
CMS Search
About
Article Search
Search by:
Search for:
Search
Search date by:
Course Start Date
Date Of issue
From
To

SEARCH ARTICLES

1. Click '**general search tips**' link to go through searching.

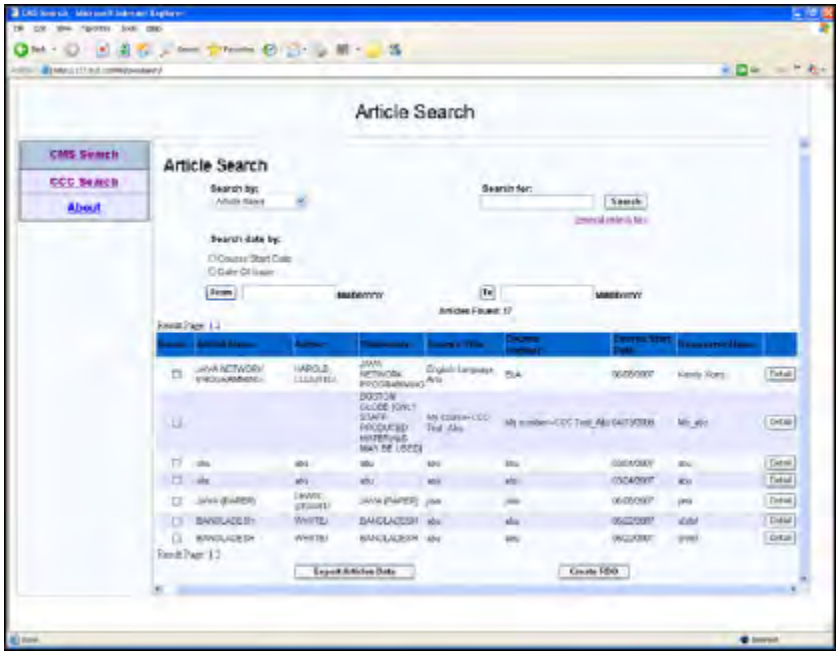


2. Articles can be searched on the basis of
   - Course Title
   - Course Number
   - Requestor Name
   - Organization
   - Department
   - ISBN
   - Article Name
   - Publication
   - Publisher
   - Publication Year
   - Author
   - RightsHolder
   - Customer Reference

   The user can also search an article for date on the basis of 'Course Start Date' OR 'Issue Date'.

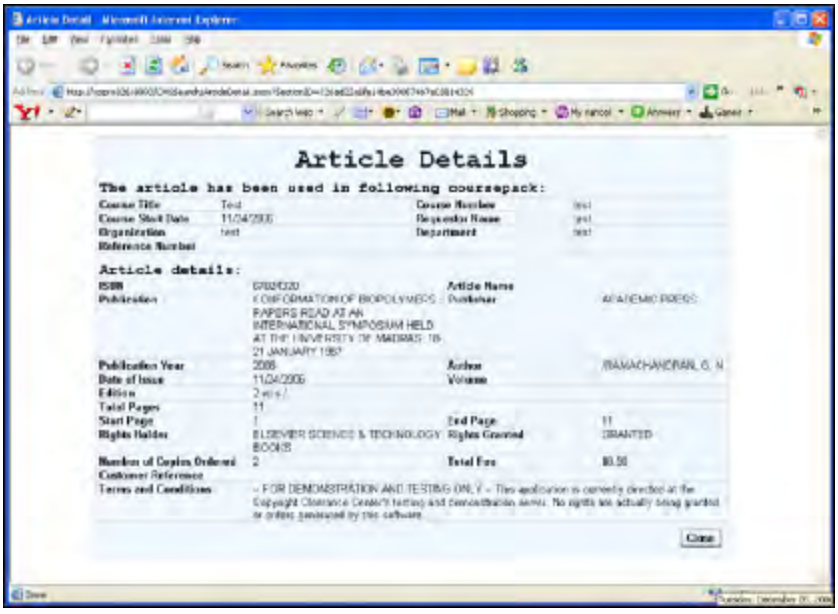
3. Select **Search** by from dropdown list, and enter search criteria at **Search for** text box, click **Search**button.

All search results will be displayed in tabular form.



SEE ARTICLE DETAILS

1. Click **Detail** button to see the details for any article. **Detail** button is available with every row in data grid.
2. An article details window will appear with all the details of an article.

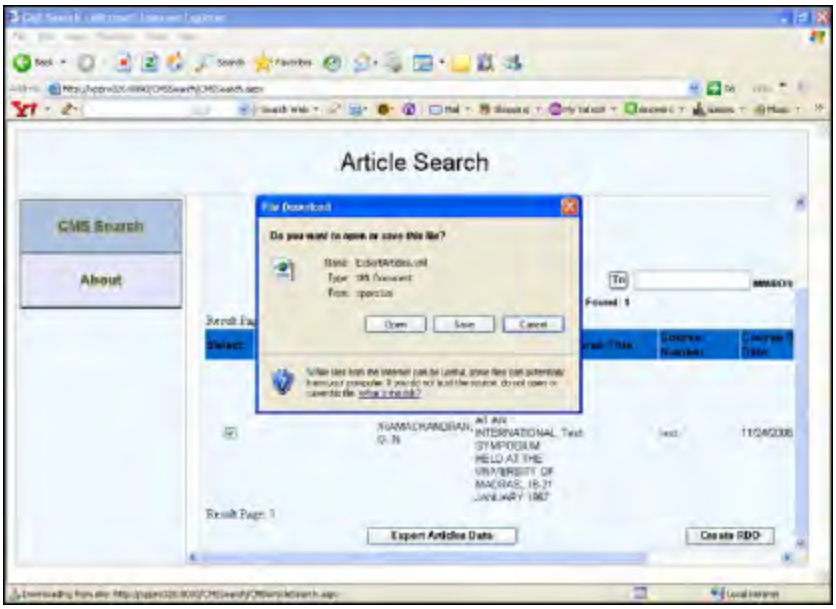


3. Click **Close** button to close this window.

EXPORT ARTICLES

1. Search Articles can be exported to a XML file. The user can select the desired articles from the search results by checking checkbox along with each article record.
2. Click button **Export Articles Data**. File Download Dialog box will pop up and user can download ExportArticles. xml to any desired directory on his/her local machine by clicking **Save** button.

Note: The created coursepack file only contains the "Copyrights" data for the article, it does **NOT** *contain the actual content pages.*

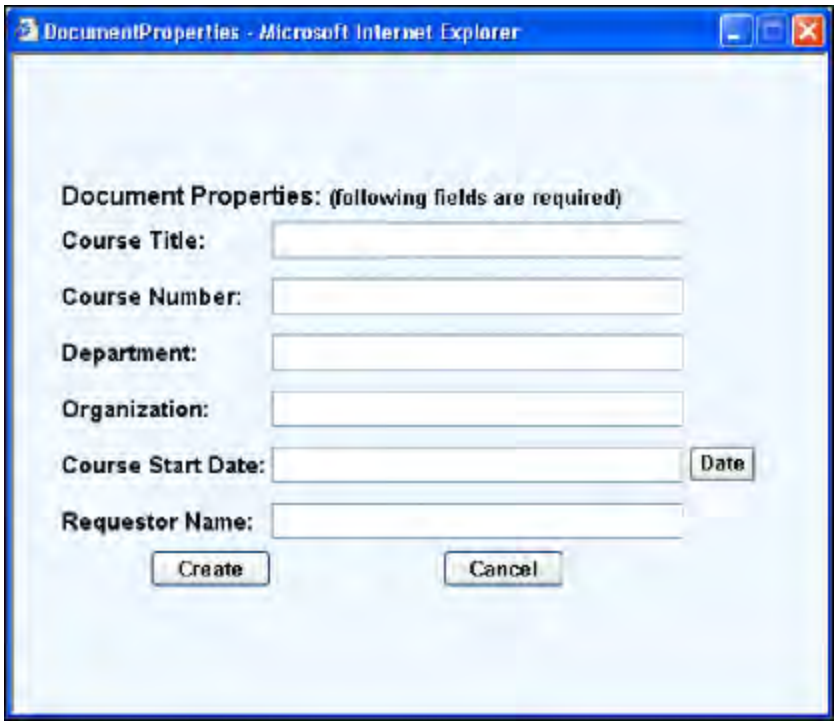


CREATE COURSEPACK

User can create a coursepack file(.rdo) with copyright metadata.

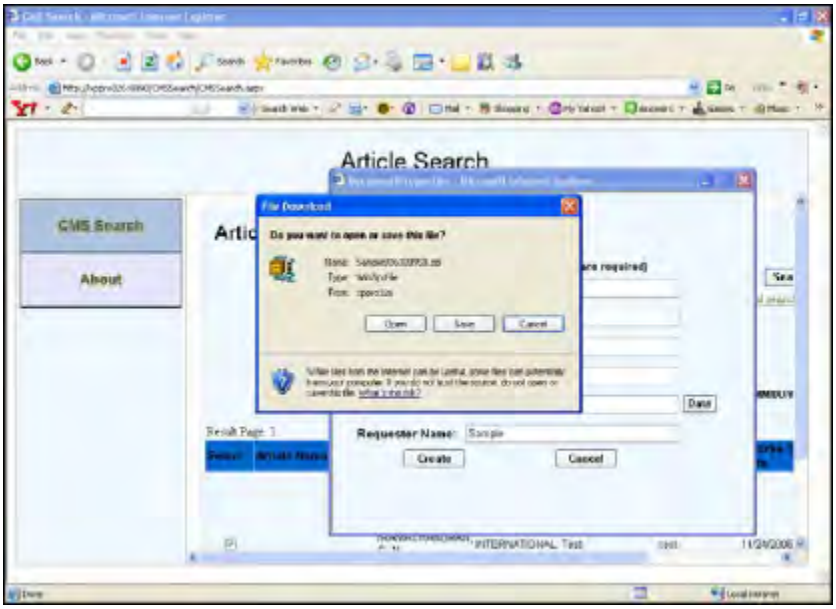
1. Select Articles from search results by checking the checkboxes.
2. Click **Create RDO** button.

3. Document UI page asking for the Document Properties will pop up.



4. Provide all the information of CoursePack level (this information is required for coursepack creation).
   - Course Title
   - Course Number
   - Department
   - Organization
   - Course Start Date
   - Requestor Name
5. Click **Create** button
6. **CoursePack** will be created and zipped. File Download dialog box will appear, user can download the zipped RDO file to his/her local machine by clicking **Save** button .

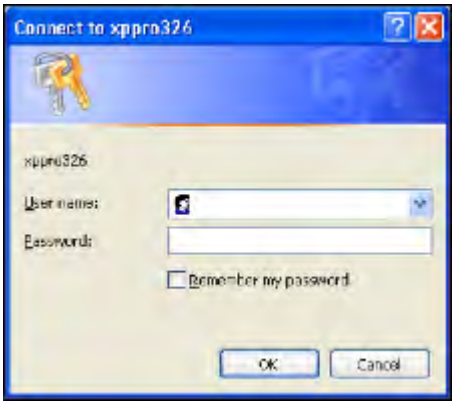
Note: The created coursepack file only contains the "Copyrights" data for the article; it does NOT contain the actual content pages.


Article Search
CMS Search
About
Requester Name:
Create
Cancel

Working with CCC Search

1. Launch the URL http://<Server-IP>:port/CMSSearch/CMSSearch.aspx .

   The user will be asked for the authentication.

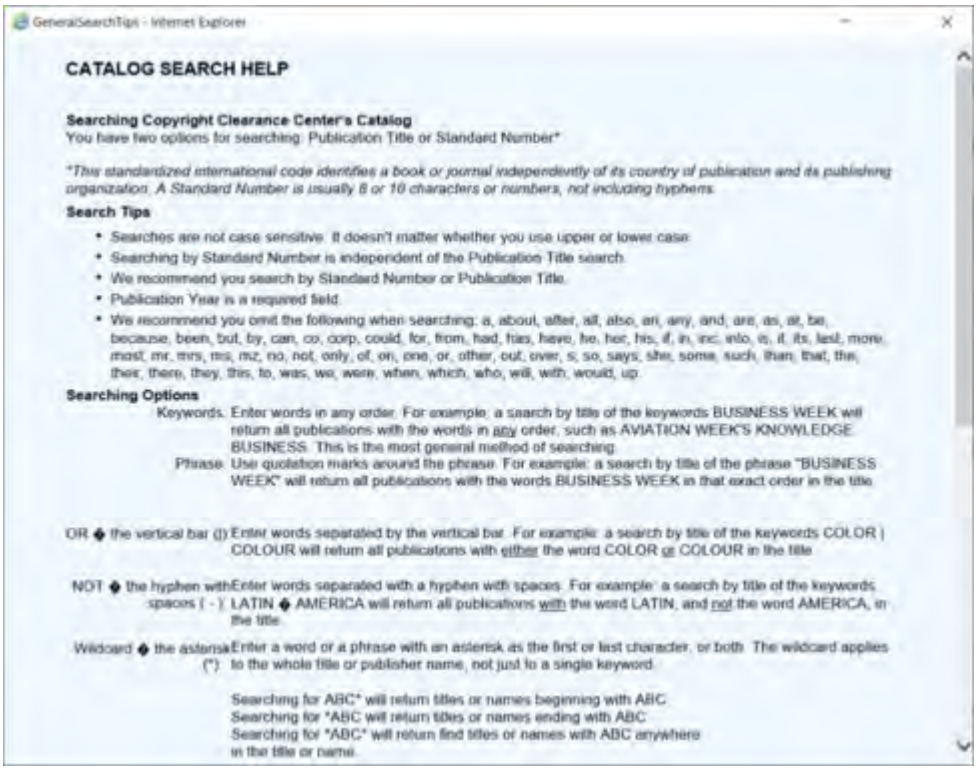


2. Provide the username/password of the user belonging to 'Xerox FreeFlow Copyright Management Service Search Users' Group.

   After valid authentication user will go to main search screen. Click **CCC Search** link in left panel.

Search Articles

1. Click '**general search tips**' link to go through the Catalog Search Help.

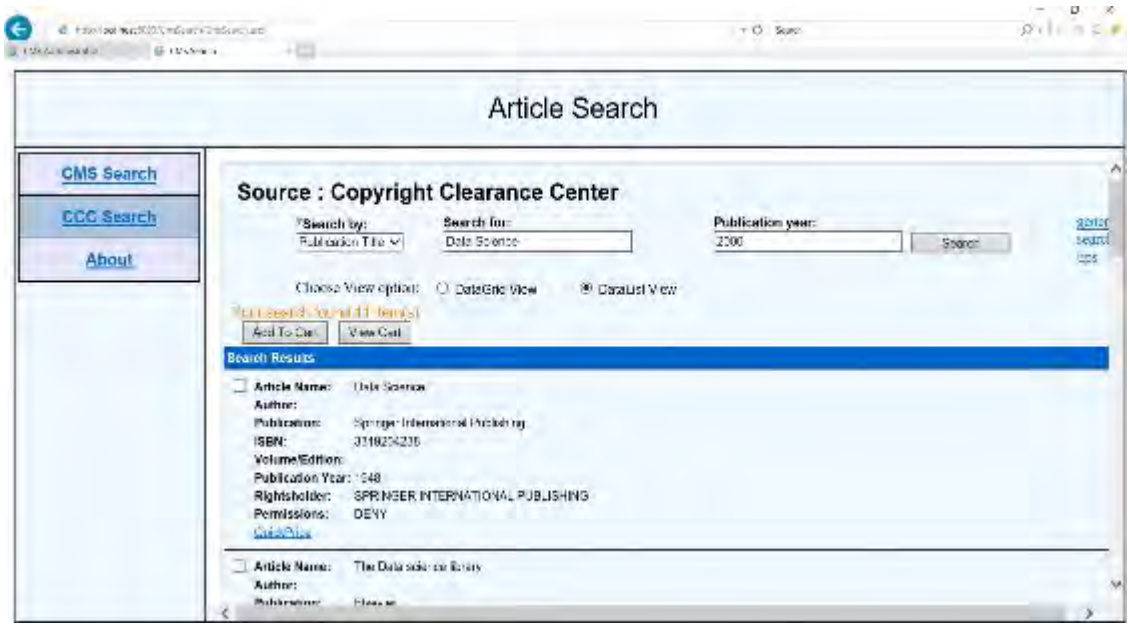


2. Select the appropriate search criteria from **Search by** dropdown box:
   - Publication Title
   - Standard Number/ISBN
3. Publication Year is a required field for the Article Search through the CCC's Academic API.

4. Enter search criteria string at Search for text box, press Search button. You will get all the articles from CCC's Academic API.

   Note: As mentioned on the screen, CCC Search returns only 100 articles at most. If you do not find your article among the results, you may want to add more specific key words for your search.

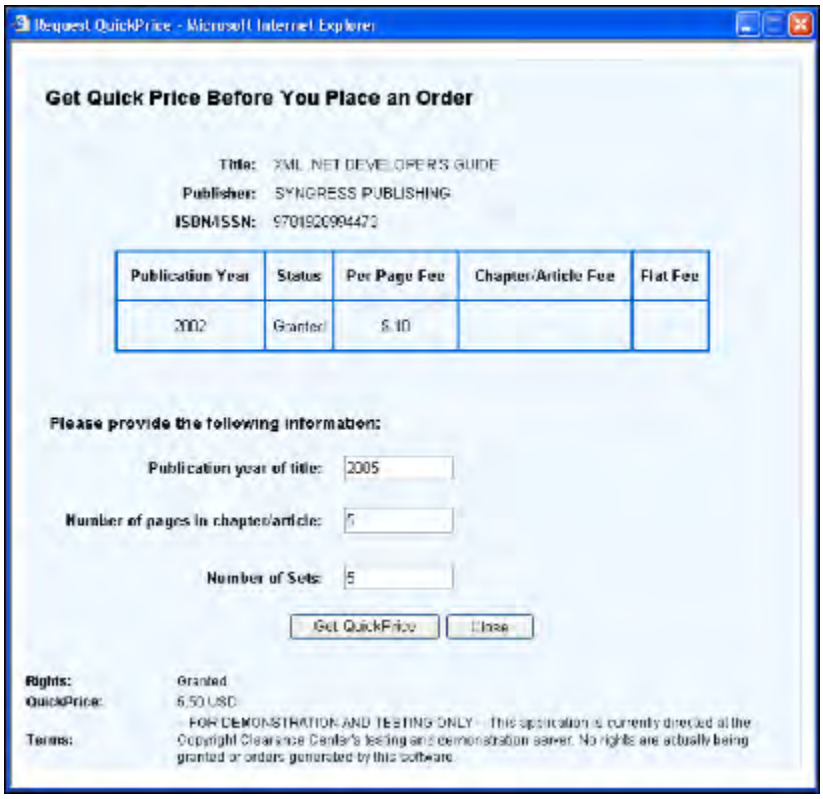
5. You can choose '**DataList View** ' to get the search results in paragraph format.



GET QUICKPRICE FOR AN ARTICLE

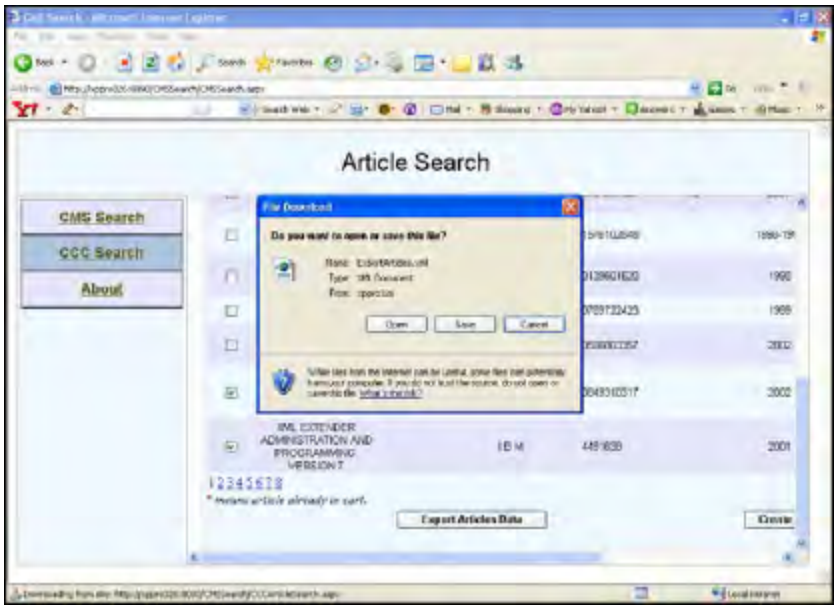
1. Click **QuickPrice** command button available with every Article Record.
2. Quick Price window pops-up.

3. Provide following required inputs to get the Quick Price for an article:
   - Publication year of title
   - Number of pages in chapter/article
   - Number of Sets
4. After providing all the above input, click button **Get QuickPrice**. You will get the results below.



EXPORT ARTICLES

1. Search Articles can be exported to an XML file. The user can select the desired articles from the search results by checking checkbox along with each article record.



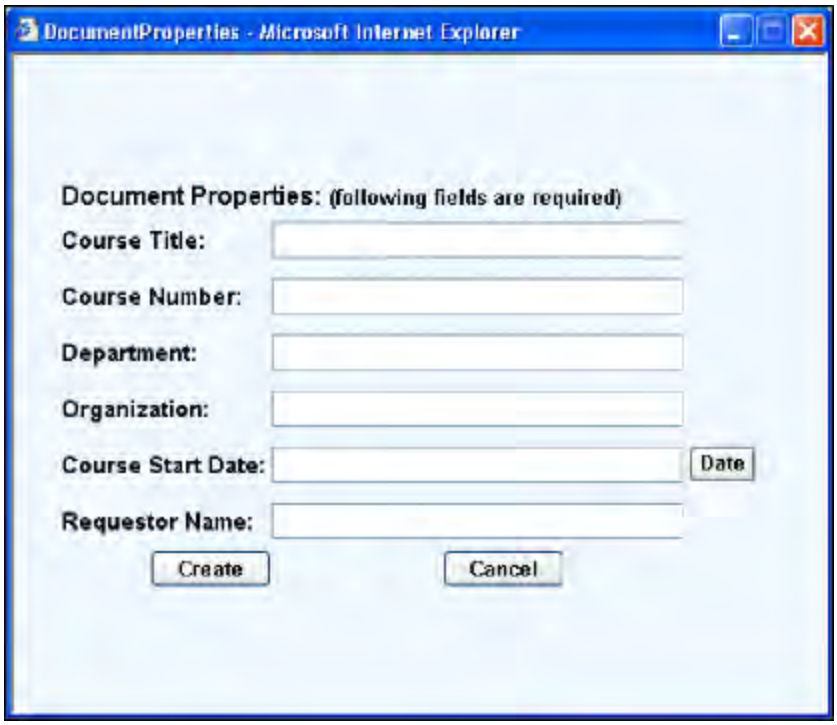
2. Click button **Export Articles Data**. File Download Dialog box will pop up and user can download ExportArticles.xml to any desired directory on his/her local machine by clicking **Save** button.

CREATE COURSEPACK

User can create a coursepack file(.rdo) with copyright metadata.

1. Select Articles from search result by using checkboxes.
2. Click **Create RDO** button.

3. Document UI page asking for the Document Properties will popup.

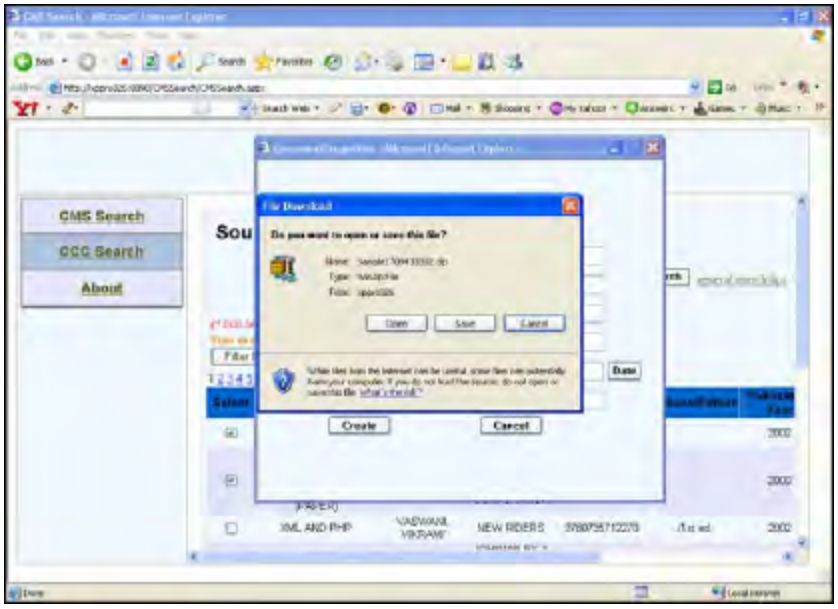


4. Provide all the properties for CoursePack level(these properties are required for coursepack creation).
   - Course Title
   - Course Number
   - Department
   - Organization
   - Course Start Date
   - Requestor Name

5. Click button **Create**.
6. **CoursePack** will be created and zipped. File Download dialog box will appear, user can download the zipped RDO file to his/her local machine by click **Save** button.

Note:

The created coursepack file only contains the "Copyrights" data for the article, it does NOT contain the actual content pages.



FILTER SEARCH

The user can narrowdown the searchresult by using

Filter Search option.

1. Click **Filter Search** button. A popup comes.

2. Select the column name and value for filtering the search results.

   Following are the Columnsfor which user can filter the search:

   - Article Name
   - Author
   - Publication
   - ISBN
   - Publication
   - RightsHolder
   - Permission

3. Click **Submit** button. The search resultswill be filteredon the basis of criteria entered.

ADD SEARCHED ARTICLE TO CART

1. Select articles using check boxes.
2. Click **Add to Cart** button.

   Selected articles will be added to the cart.

3. The user can select articles in Cart and can do 'Export Articles Data' and 'Create RDO' using button 'Export Articles Data' and 'Create RDO' respectively.
4. The user can select the articles in cart and click button **Remove Article(s)** to remove the articles from the cart.

VIEW CART

1. Click button **View Cart**.
2. All articles available in cart will be displayed in pop up window.
3. The user can select articles in Cart and can Export Articles Data and can Create RDO using button **Export Articles Data** and **Create RDO** respectively.
4. The user can select the articles in cart and click button **Remove Article(s)** to remove the articles from the cart.

Error Messages

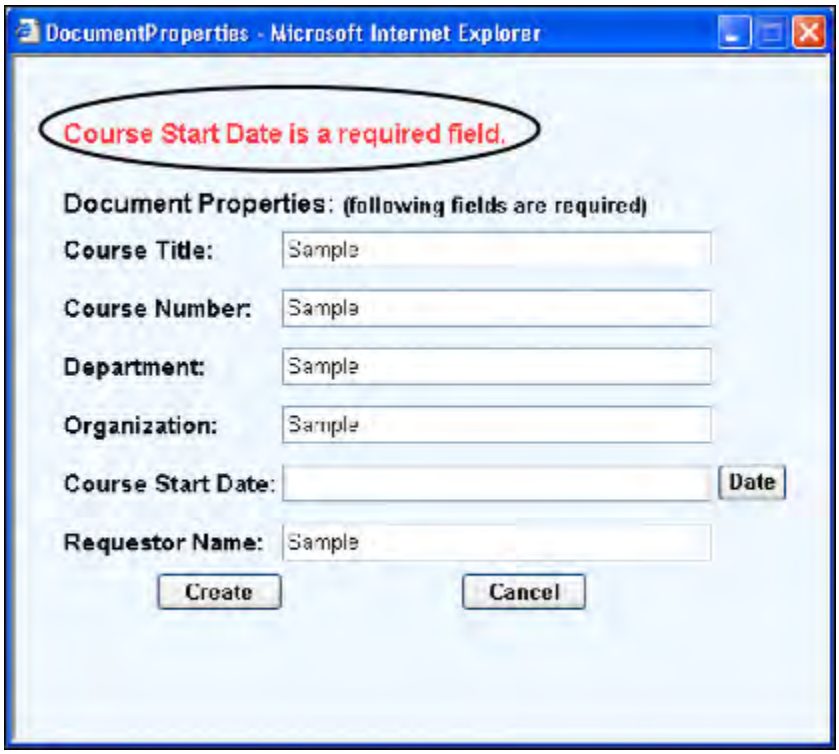
CCC SEARCH

1. If user does not select any article(s) and click the button **Export Articles Data** an error comes.

2. If user does not select any article(s) and click **Create RDO** button, an error comes.

3. When user selects the article(s) and click **CreateRDO** button to create CoursePack, Document properties UI interface comes asking for the Document Properties. All fields here are required.

   If user does not provide any of the input, an error occurs and it is shown as in the screen below:

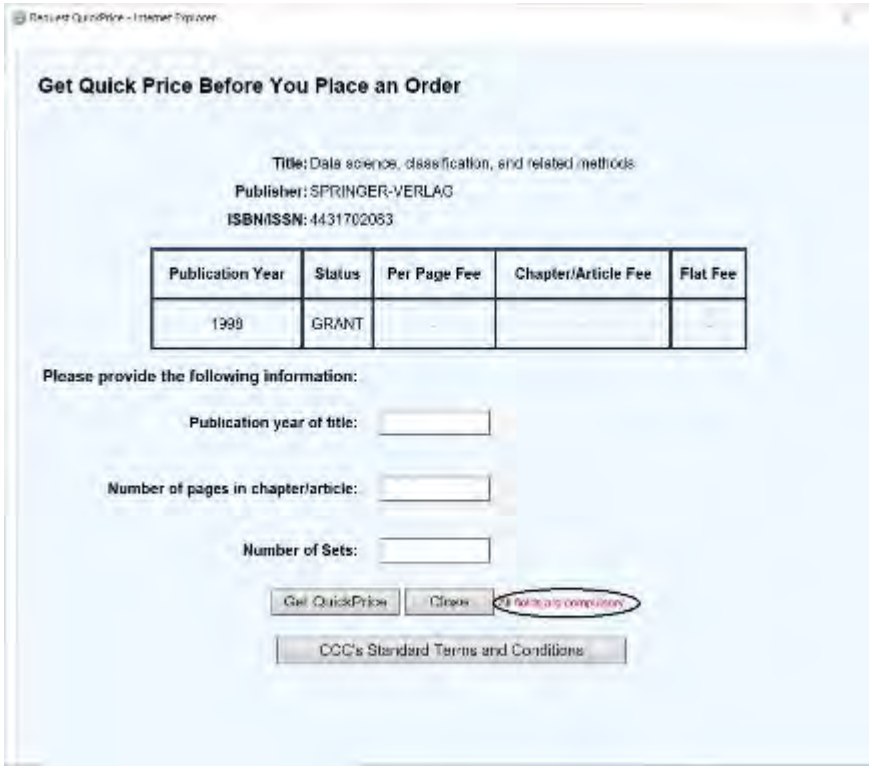


   Similarly, an error will occur if user does not provide Course Number OR Organization OR Course Start Date OR Name.

CCC SEARCH

1. If user does not provide any '**Search For**' criteria or if the 'Search For' criteria provided is of one character an error comes.

2. If user does not provide any of the input values while querying for **Quick Price** of an article an error comes



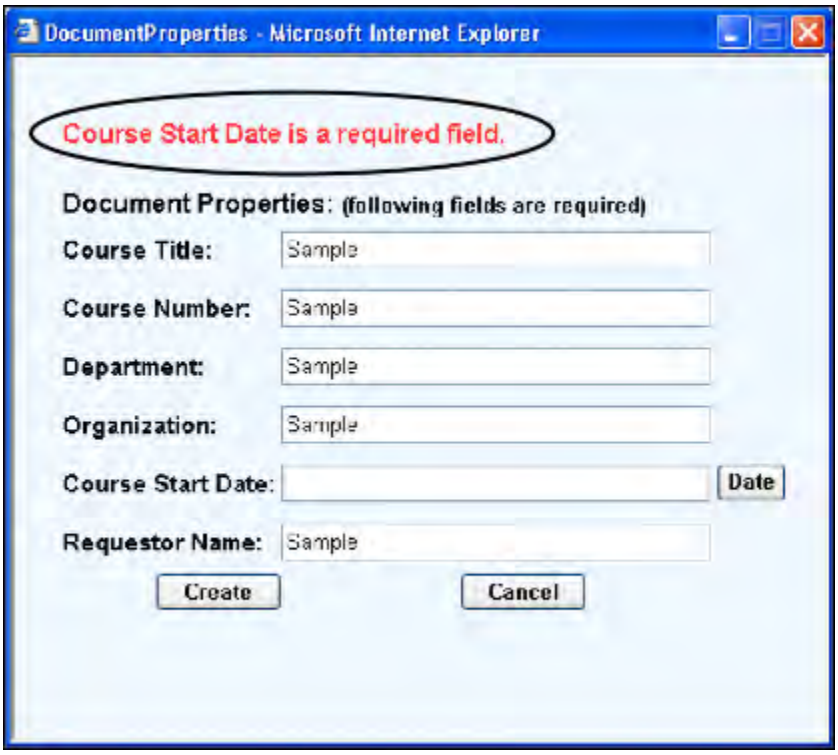
The user should provide all the input values: **Publication year, Number of pages** and **Number of Sets**.

3. If user does not select any article(s) and click the button **Export Articles Data**and error comes.

4. If user does not select any article(s) and click **Create RDO** button, an error comes.

5. When user selects the article(s) and click **Create RDO** button to create CoursePack, Document properties UI interface comes asking for the Document Properties. All fields here are compulsory.

   If user does not provide any of the input, an error comes.



   Similarly, an error will occur if user does not provide Course Number OR Organization OR Course Start Date OR Requestor Name.

CMS: CCMOrder.exe

Xerox FreeFlow Makeready allows you to place copyright permission orders with the CCC. These orders are known as Automatic or Research Orders. The permission orders are cleared by the CCC as Granted, Denied, Pending, Contact Rights Holder Directly, or Forwarded to Rights Holder.

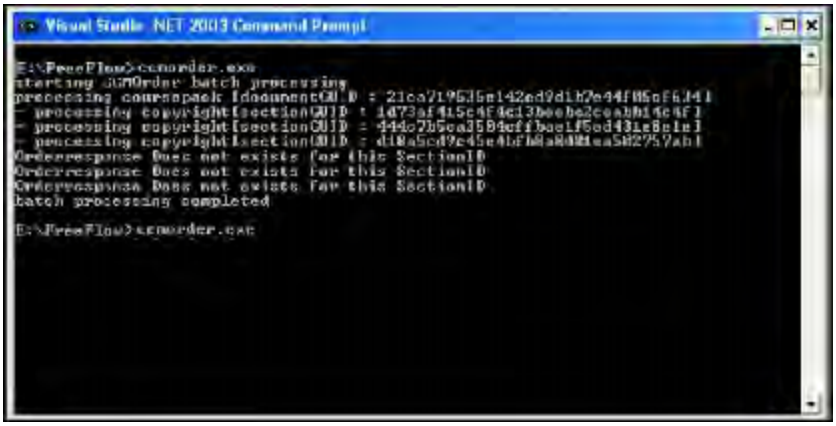
The permissions that are Granted or Denied are final; the permission Contact Rights Holder Directly has to be managed directly with the rights holder since the CCC does not provide permission in this case.

After processing, the CCC staff clears Pending or Forwarded to Rights Holder permissions periodically, and these permissions are converted to Granted or Denied. Check the status such pending orders using the CCMOrder.exe utility, which needs to be executed on a periodic basis. As installed, this utility does not run periodically. Ideally, this utility should be executed nightly or twice weekly through the "Scheduled Task" facility provided by Windows XP. This utility can be used from the command line on an as-needed basis.

This chapter explains the how to use the utility and its output.

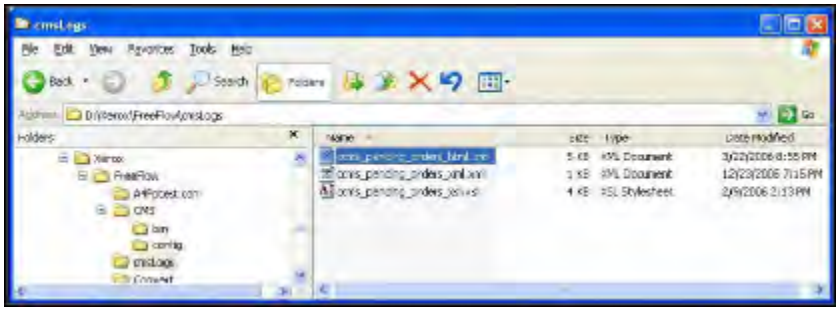
Pending Order Handling

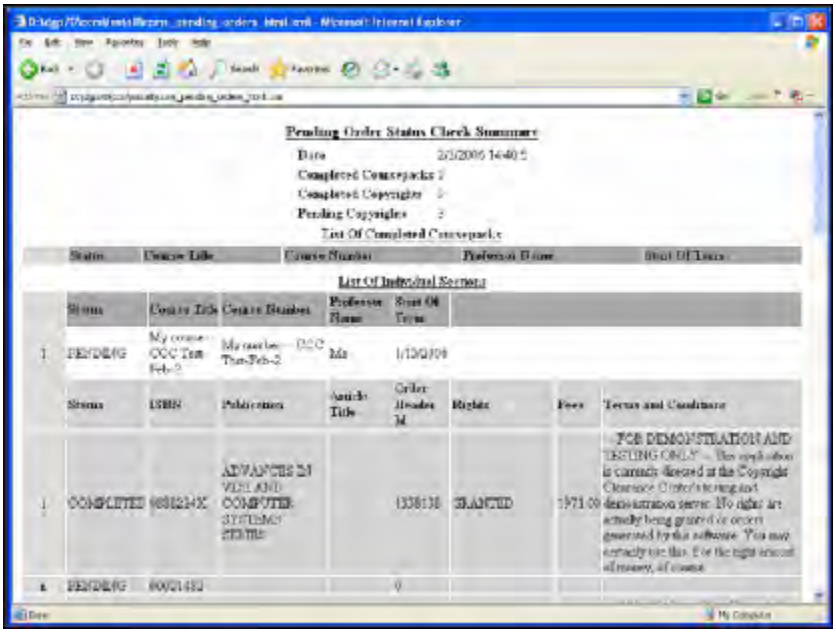
The CCMOrder.exe utility is located where Xerox FreeFlow Makeready Copyright Management is installed. This utility does not require any parameter and can be invoked as **ccmorder.exe**.



The utility writes out a few log messages, but none requires any action. This utility produces a status listing file of its activity to the path "PendingOrderActivityLogPath" in the configuration file. The path MUST be set to the correct directory, for example, if the FreeFlow software is installed at d:\FreeFlow, then the value for "PendingOrderActivityLogPath" should be set to "d:\Xerox\FreeFlow\cmsLogs".

The file "ccms_pending_orders_html.xml" contains the summary of order statuses for each coursepack that had one or more pending sections. This file should be viewed with Microsoft Internet Explorer 6.0 or higher. If a coursepack has 1 "pending" section, and if it gets finalized, then it will be declared as a "Completed" coursepack; if a coursepack remains 1 or more "pending" sections, then it is considered a "pending" coursepack.

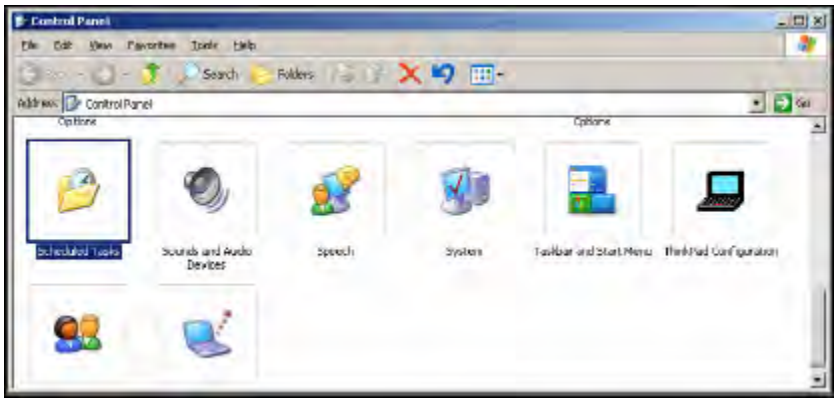




Note: This status file, "ccms_pending_orders_html.xml", is overwritten every time CCMOrder.exe is run. However, the order statuses are recorded in the database, and you can view the individual Coursepack summary page on the CMS Administration user interface.

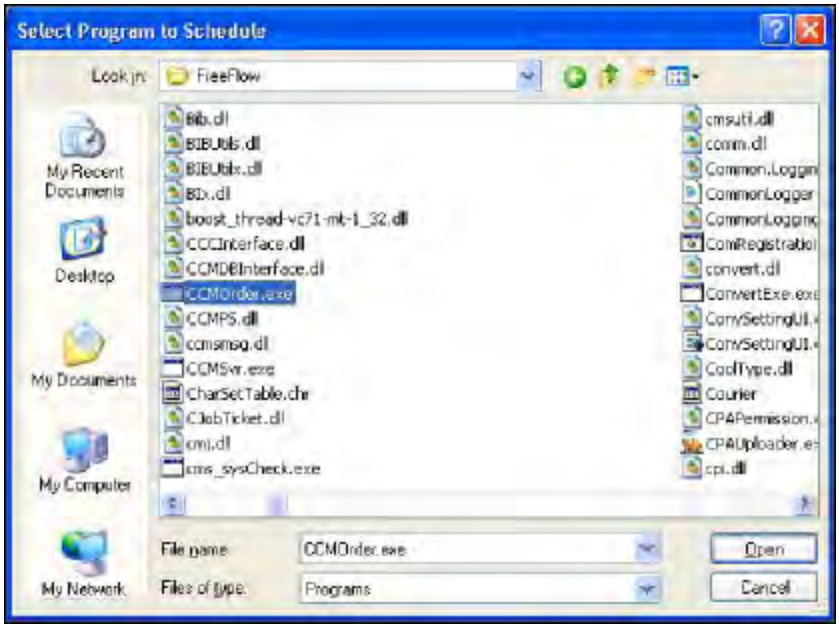
Scheduling CCMOrder to run periodically

1. Select **Start > Settings> Control Panel**, and double-click on **Scheduled Tasks**.



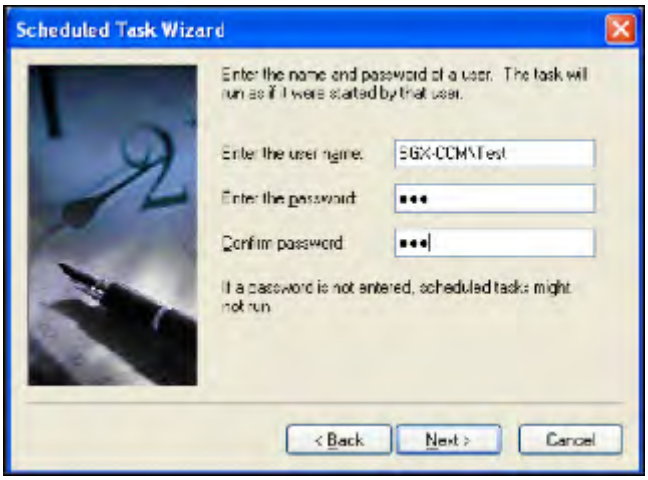
2. In the Scheduled Tasks window, click on **Add Scheduled Task**. The wizard that helps you schedule your task opens.

3. Follow the prompts as appropriate, and select **CCMOrder.exe** as the program to run.

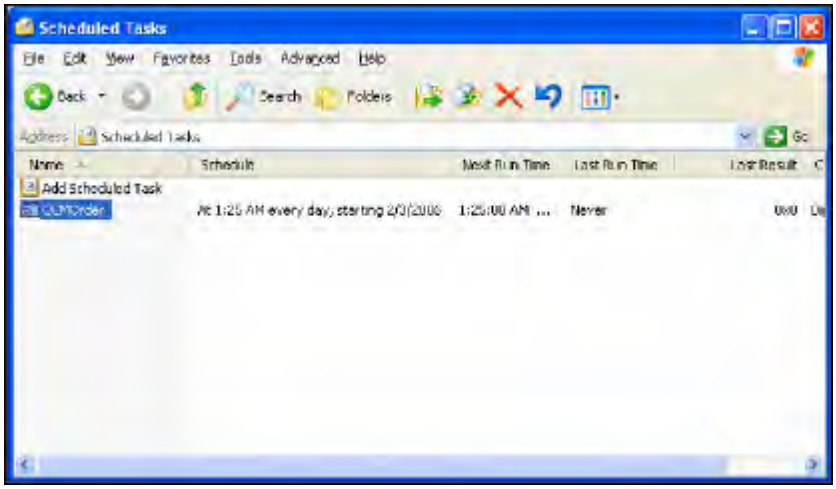


4. Select it to run Every Day, if you prefer. Then select the time of day to run the program.

5. When prompted, provide the user name and password for this program execution.



6. After you select **Finish**, the CCMOrder.exe appears in the Scheduled Tasks window, as shown below.



Database Utilities

CMS stores data in a Database system. As your installation generates more coursepacks, the size of the database increases, and periodically the database should be purged of older coursepack data. Also, the database should be backed up periodically so it can be recovered if something goes wrong with the machine. The two utilities described here help you with backup,purge, and restore.

Purging Data

The data purge utility allows the user to:

- Back up data to an xml file.
- Back up data to an xml file, as well as purge/remove the backed up data from the database.
- Remove data from the database without backing it up.

These functions operate based on the "start of term" (SOT) date of the coursepacks stored in the database.

1. Open a command window, and change the directory to the location in which the DBPurge.exe is installed.
2. DBPurge.exe takes exactly three arguments:

   DBPurge [SOT] [RETAIN/REMOVE] [DEL]/[DIRPATH]

   - **First argument**: [SOT] - A valid date (Start of Term) in MM/DD/YYYY format. This is a required argument. All data for a coursepack with the Start of Term the same or earlier than the given date is backed up and/or removed.
     - **Second argument**: Can be [RETAIN] or [REMOVE]. This argument is used along with the third argument. If RETAIN is used, then the third argument must be a DIRPATH. If REMOVE is used, then the third argument can be DEL or DIRPATH.

       Note: You must use the REMOVE and DEL combination with extreme care, since the database deletion is a non-recoverable operation.

     - **Third argument**: Can be a string "DEL" or [DIRPATH]. DEL: Its only valid value is DEL. DIRPATH: The Windows path to a directory for keeping the purged records. *This directory must exist,and it must be empty.*

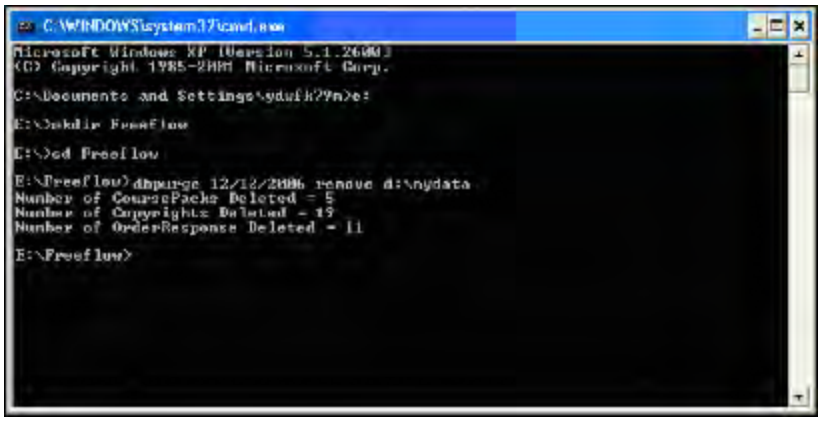
   For example:

   If you want to delete without saving the records for which the StartOfTerm is earlier than 6/11/2003, then the command should be:

   DBPurge 06/11/2003 REMOVE DEL

   If you want to delete the records for which StartOfTerm is earlier than 12/12/2006, and you also want to save these deleted records in a file in a specified directory (say, d:\mydata), then the command should be:

   DBPurge 12/12/2006 REMOVE d:\mydata



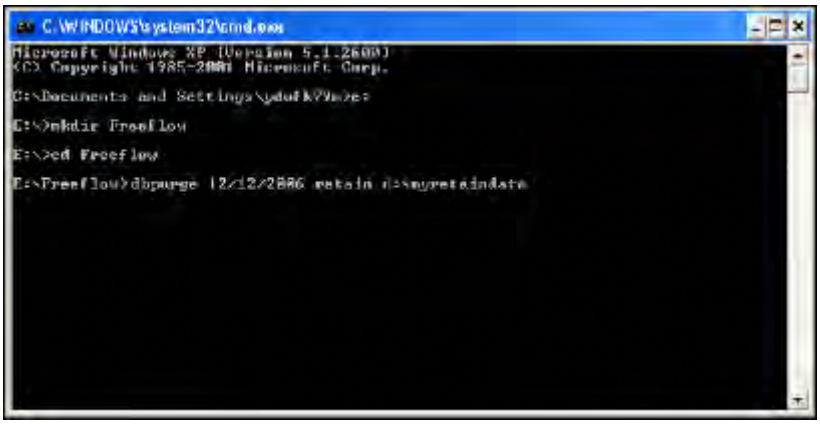
The number of objects purged displays in the command window, as shown above.

If you want archive the records where StartOfTerm is earlier than 12/12/2006, but only want to save these records in an XML file in the specified directory (say, d:\mydata), the command should be:

DBPurge 12/12/2006 RETAIN

d:\myretaindata.

It is recommended that this operation is run weekly or daily to preserve the data.



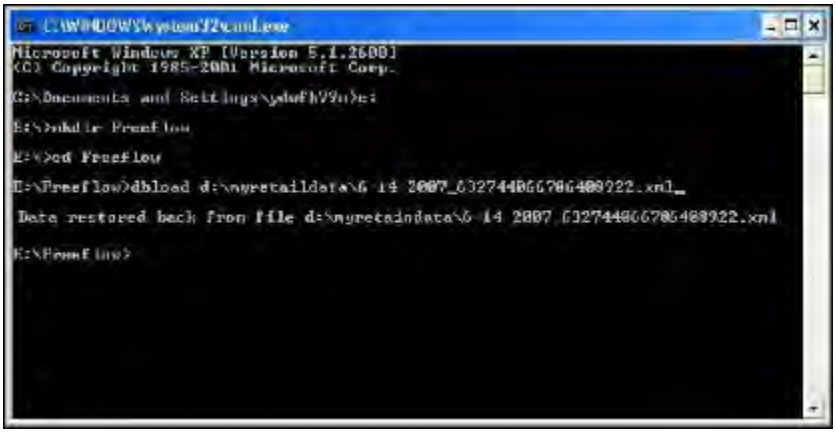
Restoring Data

The DBLoad utility allows a user to upload the data saved by the DBPurge back to the CMS database.

1. Open a command window and change the directory to where DBLoad.exe is installed.
2. DBLoad.exe takes one command-line argument: DBLoad FILEPATH FILEPATH should be the full path of the file that needs to be loaded into the Database.
3. Type the command DBLoad FILEPATH - for example:

   DBLoad D: \ccm\common\temp1\1-10-2006_632725036701216059.xml

Note: Only those files whose schema is the same as that of the CCM database will be loaded. If the file is damaged or unreadable, the utility returns an error.



Note: Only those files whose schema is the same as that of the CCM database will be loaded. If the file is damaged or unreadable, the utility returns an error.

Detail Error Messages and Remedial Actions

FreeFlow Makeready software and FreeFlow Copyright Management Service (CMS) report descriptive errors and the numeric error code. This chapter explains the source of the errors, including possible corrective actions.

Error Code Table

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
-	Unknown Error	This could occur on a CMS Client if the CMS Server goes down or reboots while there is an active connection to it. To recover, try closing FF Makeready on CMS Client and restart it. If the error persists, reboot the CMS Client.
-	Request Copyright Price Error (COM Error)	See Error Code 2.
1	Success	All worked as expected. No error message is shown in such cases. No corrective action is required.
2	Call to CCM server failed (Server error due to some failure)	This error is usually due to incorrect configuration, and sometimes (though very unlikely) due to network or operating system failures. Corrective action: Check the configuration and ensure that the CCMSvr.ini and CRApi.ini files have correct values for the server IP Addresses. Another reason for this failure is incorrect configuration of the CMS Server and CMS Client as described in the *Multiple CMS Client Configuration* chapter.
3	Record mark deleted	This occurs if you attempt to delete a record that is already marked deleted. If that is not the case, report this problem to Xerox Support.
4	This error occurs if database record (coursepack or copyright) does not exist.	1: This could occur if a coursepack is deleted from the CMS UI or purged from the database. 2: This occurs if the RDO file is old or is brought into a CMS system in which it was not originally used to place copyrights order.

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
		If one of the above cases is true, the corrective action is to place a new order from the new RDO, and then all the new records will be placed in the CMS. The other alternative is to restore the previously purged records in the database. The error should then go away. If none of the above applies, report this problem to Xerox Support with all related details.
5	CCC Gateway Call error. [CCC Gateway unrecoverable error]	If the system was in operation already and this occurred, it could be due to transient problems. 0: Repeat the operation to see if the issue goes away. 1: Check that the system has correct configuration; specifically check that the ProxyServer IP address or passwords have not changed. 2: Check that your installation has internet connectivity by using a browser and going to a known working **internet** site. 3: Check that your username and password account information with CCC is still correct. 4: Check with the CCC to see if their web site is not down, if they have upgraded the system, or if their URLs have changed. If none of the above applies, report this problem to Xerox Support with all related details.
6	DB connection error at server side	This error is *usually* due to an incorrect configuration, and *sometimes* (though very unlikely) due to network or operating system failures.

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
		1: Check the configuration, and ensure that the CCMSvr.ini and CRApi.ini files have correct values for the server IP addresses. 2: Open a browser and try connecting to the CMS UI to perform a search function. 3: Ensure that the CMS Server is being operated by a user with access rights to the CMS server in case, if the CMS Server was installed by an administrative user but not made available for an operator to use, this error may occur. If everything was working, and suddenly this error occurs and persists, report this problem to Xerox Support with all related details.
7	Any internal DB error at server side	This should not occur. Report this problem to Xerox Support with all related details.
8	Copyright section is not manual and hence Order Response structure can not be updated	This should not occur. Report this problem to Xerox Support with all related details.
9	Order cancelled already	This might occur if an already "cancelled" order with the CCC is being cancelled again. It is also possible that someone called the CCC directly to cancel this order or of the CCC had cancelled this order on its own. If none of the above, report this problem to Xerox Support with all related details.
10	Order invoiced already	This may occur if an "invoiced" order is being modified or cancelled. Neither of these operations is allowed. If none of the above, report this

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
		problem to Xerox Support with all related details.
11	Manual copyright	This should not occur. Report this problem to Xerox Support with all related details.
12	Failed to connect CCM server	If the system was operational and this error occurs, check for any operating system configuration changes and/or check the system's firewall setting. This error is *usually* due to incorrect configuration, and *sometimes* (though very unlikely) due to network or operating system failures. As a corrective action: Check the configuration and ensure that the CCMSvr.ini and CRApi.ini files have correct values for the server IP Addresses. If the error persists, report this problem to Xerox Support with all related details.
13	Unknown Exception	This should not occur. Report this problem to Xerox Support with all related details.
14	COM exception	If the system is already operational and the error occurs, then check for any operating system configuration changes and/or check the system's firewall setting. This error is *mostly* due to incorrect configuration, and *sometimes* (though very unlikely) due to network or operating system failures. As a corrective action: check the configuration, and ensure that the CCMSvr.ini and CRApi.ini files have correct values for the server IP Addresses.

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
		If the error persists, report this problem to Xerox Support with all related details.
15	Check for missing required field in struct CoursePackInfo & struct CopyrightInfo and check for GUID for null only	This should not occur. Report this problem to Xerox Support with all related details.
16	Inputs are not valid e.g. AddSpecialOrderCopyrightToCourse-pack() returns InValidInputs if ISBN is not NULL and publicationYear is not valid (between 1000 to 3000)	This should not occur. Report this problem to Xerox Support with all related details.
100	Missing Required field [CCC Gateway]	If this occurs, check for a detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent orders or order modification is invalid and take the corrective action. If the problem cannot be resolved, report this problem to Xerox Support with all related details.
101	Inputs are not valid [CCC Gateway]	If this occurs, check for detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent orders or order modifications is invalid and take the corrective action. If the problem cannot be resolved, report this problem to Xerox Support with all related details.
102	Input field lengths exceeded limits [CCC Gateway]	If this occurs, check for a detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
		orders or order modifications is invalid and take the corrective action. If the problem cannot be resolved, report this problem to Xerox Support with all related details.
103	Invalid input value. User-provided input values conflict.	If this occurs, check for a detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent orders or order modifications is invalid and take the corrective action. If the problem cannot be resolved, report this problem to Xerox Support with all related details.
200	Invalid Username/Password.	The CCC username and password provided to CMS server are not correct. Provide the correct Username and Password. One way to verify the correct username and password is by going to the www.copyright.com site and logging in to see if that works.
201	Unauthorized access. Username provided does not have privilege to access (modify, cancel, or check status) the order header or order detail.	This might occur mostly because the order you are trying to modify or cancel was ordered by a different account from your organization. The other possibility is that your account with the CCC changed, but you imported some old coursepack into the system, and this coursepack has orders on the old account. If the error persists, check with the CCC to see if there is an issue with your account; if so, report this problem to Xerox Support with all related details.
202	We are currently unable to process	If the error persists, check with the

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
	this request. Please retry within 15 minutes or contact your system administrator.	CCC to see if there is an issue with your account; if so, report this problem to Xerox Support with all related details.
203	Party account on hold. The user is a registered user. However, the party with which they are associated has an on hold account. The user is not authorized to make further transactions.	If the error persists, check with the CCC.
204	Order detail has already been invoiced or cancelled. Order details cannot be modified after they have been invoiced or cancelled. Order details cannot be cancelled after they have been invoiced.	The most likely reason for this error is that someone has cancelled the order outside the CMS server by calling the CCC directly; it might also be an old or incomplete order coursepack from a previous term, and an attempt is being made to change the permission/copy count. If this occurs, note the OrderID and contact the CCC for further processing.
205	Unknown order header ID. The order header ID supplied does not match any of the order detail ID in our records.	This should not occur. Report this problem to Xerox Support with all related details.
206	Unknown order detail ID. The order detail ID supplied does not match any of the order detail IDs in our records.	This should not occur. Report this problem to Xerox Support with all related details.
207	Cannot find work with given cccWorkInst. Fees cannot be calculated. The work can be requested as a special order. [CCC Gateway]	If this occurs, check for a detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent orders or order modifications is invalid and take the corrective action. If the problem cannot be resolved, report this problem to Xerox Support with all related details.

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
208	Order header cannot be created.	This should not occur. Report this problem to Xerox Support with all related details.
209	Order detail cannot be created.	This should not occur. Report this problem to Xerox Support with all related details.
210	Order detail cannot be modified.	This should not occur. Report this problem to Xerox Support with all related details.
211	Order detail cannot be cancelled.	This should not occur. Report this problem to Xerox Support with all related details.
212	Order detail has already been committed.	This should not occur. Report this problem to Xerox Support with all related details.
213	Order detail cannot be committed.	This should not occur. Report this problem to Xerox Support with all related details.
214	[Obsolete error code]	This should not occur. Report this problem to Xerox Support with all related details.
215	This order has not been committed. It is in a transitional state and cannot be modified or viewed.	Retry this operation after some time; if the error persists, report this problem to Xerox Support with all related details.
216	Fees cannot be calculated at this time [CCC Gateway]	Retry this operation after some time; if the error persists, report this problem to Xerox Support with all related details.
217	Request exceeds the number of pages/copies authorized by the rights holder. The right can be either "Denied" or "Forward to Rights holder" depending on the work. [CCC Gateway]	This is an error from the CCC. Take the corrective action based on the message. You can also check for a detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent orders or order modifications is invalid and take the corrective action.

ERROR CODE	DESCRIPTION	POSSIBLE EXPLANATION OR CORRECTIVE ACTION
218	Your request exceeds a system limit. Please reduce the quantity requested to obtain permission. [CCC Gateway]	This is an error from CCC. Take the corrective action based on the message. You can also check for a detailed error message in the Windows Application Event log. Look for the Type: Error and Category: CCM. The detailed message should indicate which field on one of the recent orders or order modifications is invalid and take the corrective action.
500	Not a valid match Search match count should be 1 (match count > 1)	This is a rare scenario in which the CCC has more than one record for a single ISBN. If your ISBN is valid, you can place a "Research Order" for this item; if that does not work, call the CCC.
501	No match found (match count is 0)	This occurs either because there was a mistake in entering an ISBN number or, if the ISBN was correct, the CCC currently does not have this item on their order list. You can place a "Research Order" for this item, and it would be shown as a "Pending" order, which will get cleared once the CCC has cleared this order. But if such "Pending" orders are not cleared from the CCC in a reasonable amount of time, you must call them with the OrderID.

Multiple CMS Client Configuration

This chapter explains how to configure a CMS Client to work with a CMS Server. Before using the configuration described here, first install the CMS Server, ensure it is operational, and then install the CMS Client.

After these steps, the configuration described in this chapter helps you establish a connection between a CMS Client and a CMS Server.

A single CMS Server can be used by three Makeready client stations. It is required that one of the Makeready stations is also running the CMS Server. Thus, the installer allows one of these choices:

- **CMS Server**: Install Makeready and CMS Server (including the DataBase)
- **CMS Client**: Install Makeready and CMS Client

The CMS Server configuration is completely self-contained, while the CMS Client configuration requires you to use the CMS service installed on another machine. After the CMS Server and the CMS Client are installed, and the CMS Server is working correctly, the following steps should be followed so the CMS Client can use the CMS Server.

There are two network configurations for the CMS Server and CMS Client(s):

- **Domain Based Configuration**: In this configuration, the CMS Server and CMS Client machines are part of a Windows domain controlled by a domain administrator. This is a recommended configuration, since it is more secure.
- **Independent Workgroup Based Configuration**: In this configuration, the CMS Server and CMS Client machines are not in a Windows domain; rather, each one is in its own workgroup. This is not a recommended configuration, since is less secure.

For the **Domain Based configuration**, you should do the following on the CMS Server machine:

1. Create a "CMSGroup" user group and add members to it.
2. Configure DCOM security properties and configure DCOM access rights for CMSGroup.
3. Configure the Firewall for DCOM communications to CMS Service. Complete the following step on the CMS Client machine(s)
4. Configure DCOM security properties.

For the **Independent Workgroup Based configuration**, complete the following steps on the CMS Server machine

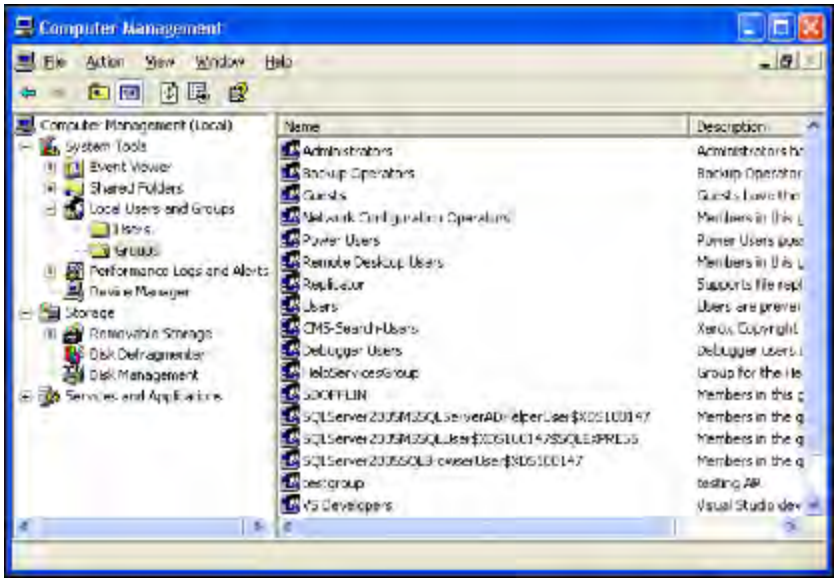
1. Configure DCOM security properties and configure DCOM access rights for "Anonymous Logon".
2. Configure the Firewall for DCOM communications to CMS Service. Complete the following step on the CMS Client machine(s):
3. Configure DCOM security properties.

Domain Based Configuration Steps

CREATE THE CMSGROUP USER GROUP AND ADD MEMBERS TO IT

Create a group for multiple Makeready clients:

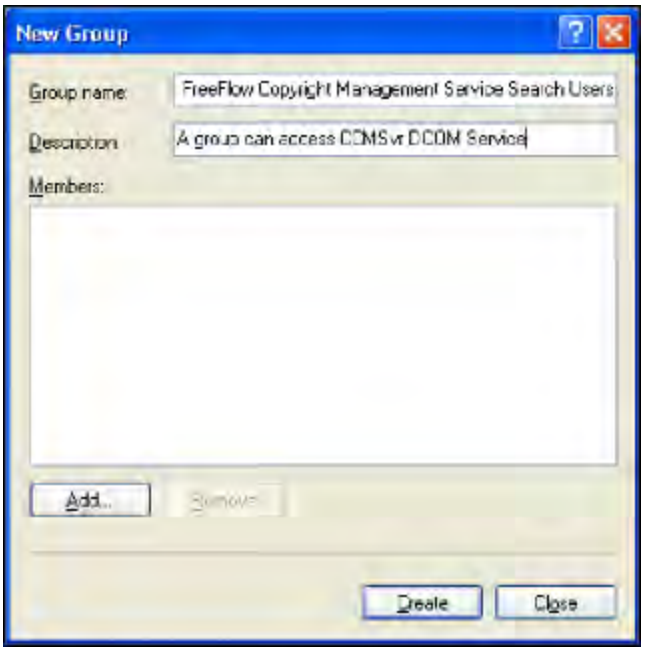
1. Right-click on the **My Computer** icon on the desktop.
2. Select **Manage** from the drop-down. The Computer Management window opens.
3. In the left pane, navigate to local **Computer Management > System Tools > Local Users and Groups> Groups**, as shown below.



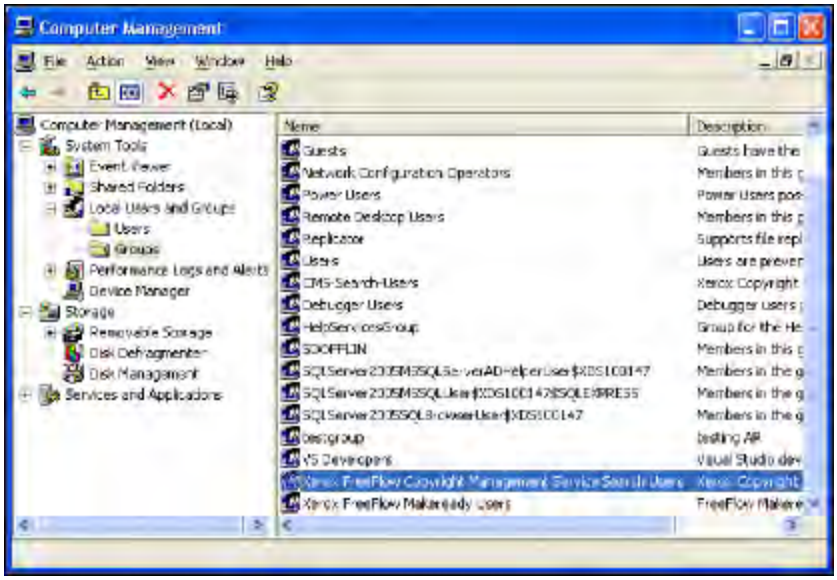
4. Right-click on **Groups**, and select **New Group**. A **New Group** window opens.

5. Enter a group name and, if desired, a description.

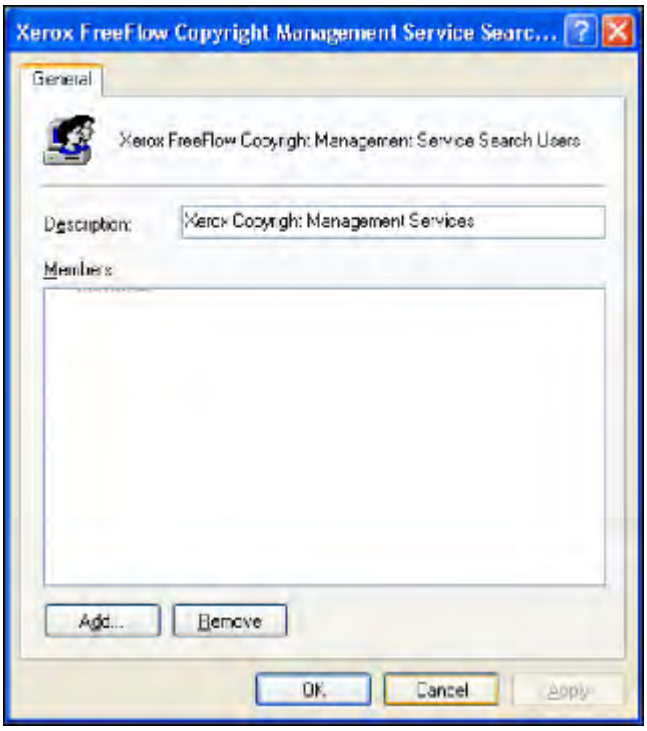
   The example below shows Xerox FreeFlow Copyright Management Service Search Users as the group name.



6. Click the **Create** button. A new group is created.



7. Double-click the newly created group **Xerox FreeFlow Copyright Management Service Search Users**. The Xerox FreeFlow Copyright Management Service Search Users Properties window opens.



8. Select the **Add** button to add the "Domain user" under whose permission the CMS Server will be running to this group. In the example window shown below,this user is **usx02592**.

9. Select **OK**. The user is added as a member of the **CMSGroup**
10. Select **Apply**, and select **OK**. The CMSGroup has been created.

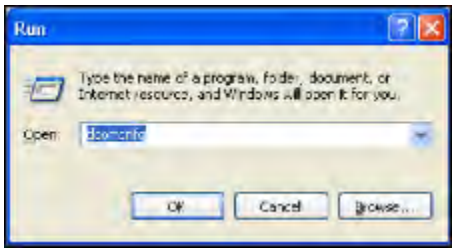
    Next, you will add another domain user(s) under whose permission the CMS Client will be running on the client machine. In the example window shown below, such a user is **usx11860**.

11. Select **Apply**, and select **OK**.

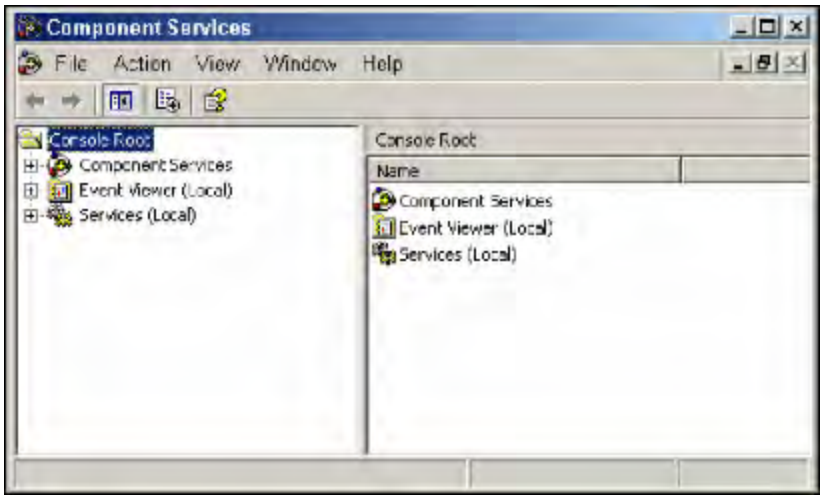
    Creation of the **CMSGroup** is complete.

CONFIGURE DCOM SECURITY PROPERTIES AS WELL AS CONFIGURE DCOM ACCESS RIGHTS FOR CMSGROUP

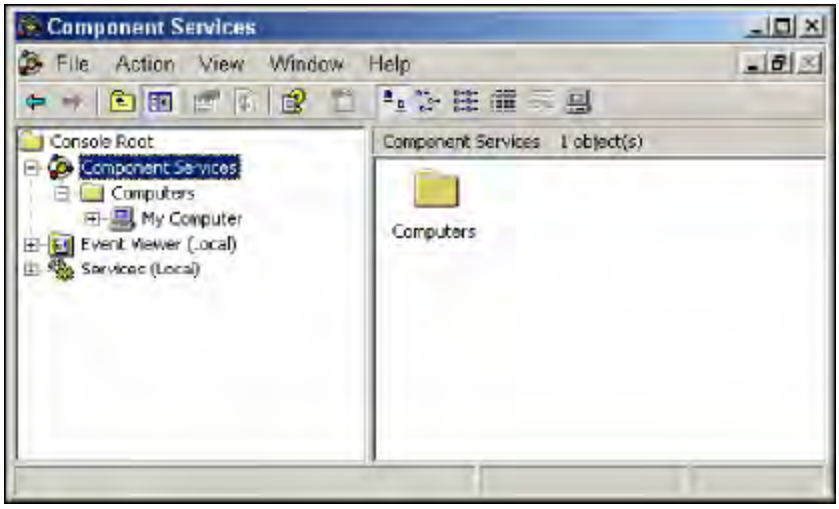
1. From the **Start** menu, select **Run**. The Run window opens.
2. Enter <**dcomcnfg**> in the Open field, as shown below.



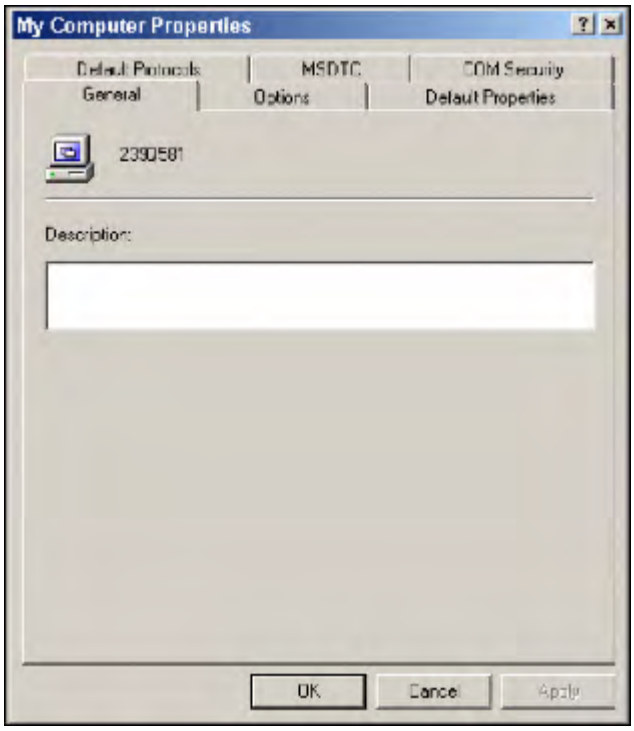
3. Select **OK**. The **Component Services** window opens.



4. Select the **Component Services** node in the left pane, and click the **+** [plus] sign next to Computers. The My Computer icon appears.



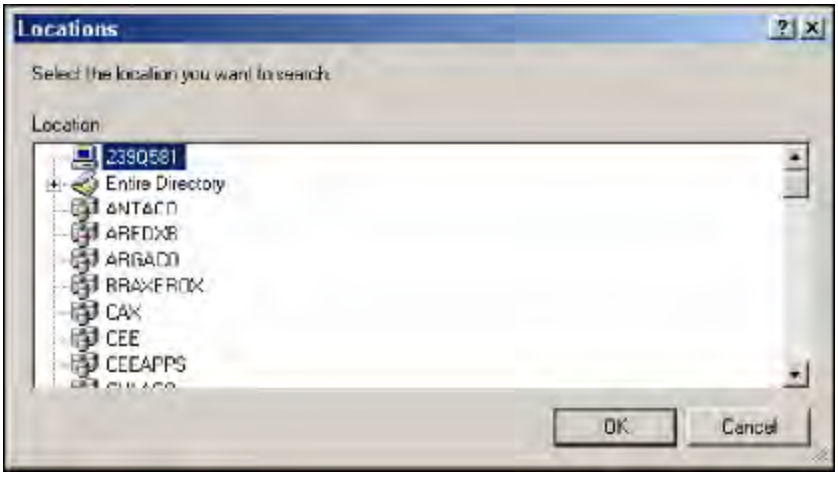
5. Right-click on **My Computer** and select **Properties** from the dropdown. The My Computer Properties window opens.



6. Select the **Default Properties** tab, and select the settings shown in the following illustration.

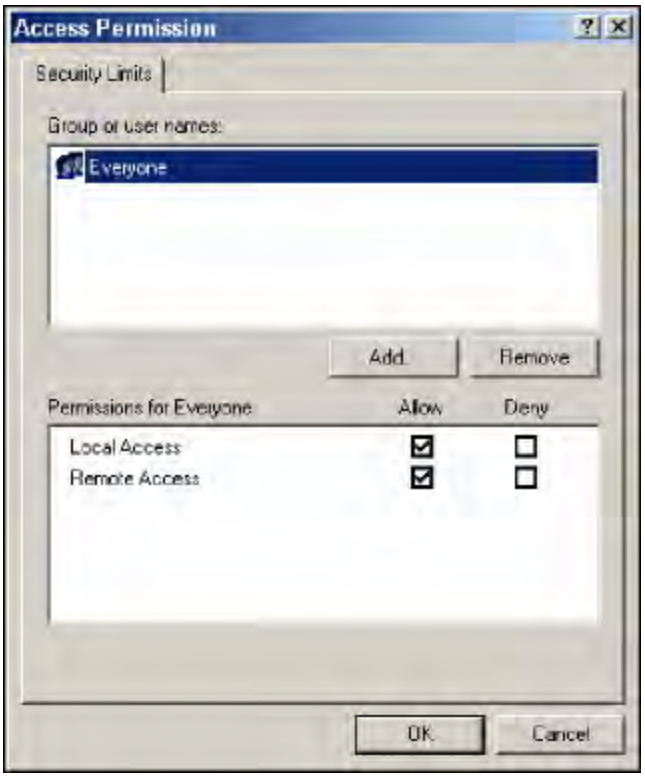
7. Select the **COM Security** tab, and then click the **Edit Limits** button under **Launch and Activation Permissions**. The **Launch Permission** window opens.

8. Click the **Add** button, and select the CMS Server machine name by clicking on the **Locations** button. In the following illustration, the server machine's name is **239Q581**.



9. Select the server machine,and select **OK**. The Select Users or Groups window opens.
10. Enter **<Xerox FreeFlow Copyright Management Service Search Users>**, the newly created group name, in the **Enter the object names to select** field.
11. Select **OK**. The group is added to the **Launch Permission.**
12. Mark all the check boxes under **Allow** in the Permissions for CMSGroup field. Select **OK** to close this window.

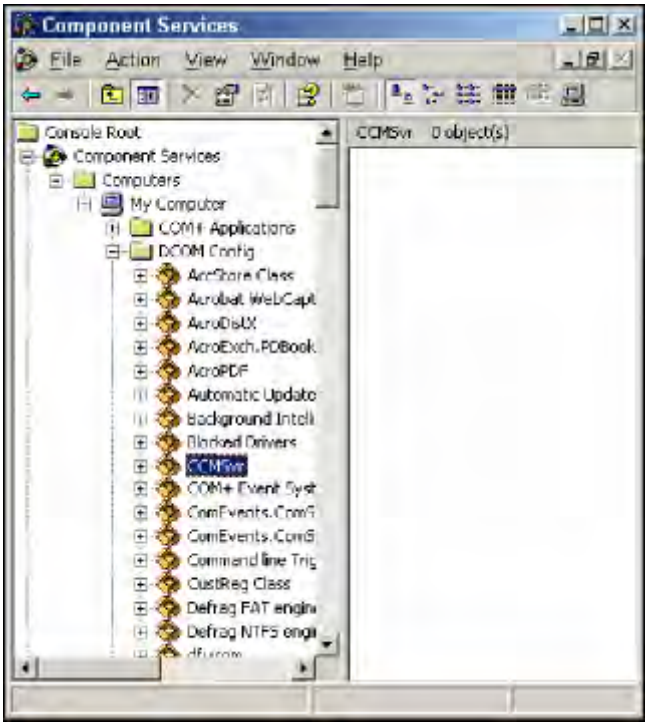
13. On the **COM Security** tab, select the **Edit Limits** button under **Access Permission**. The **Access Permission** window opens.



14. Select the **Add** button to add the group **Xerox FreeFlow Copyright Management Service Search Users** to the **Group or user names** list. Use the same steps you took to add the group to the **Launch Permission**. Mark all the check boxes under **Allow**, as shown below.

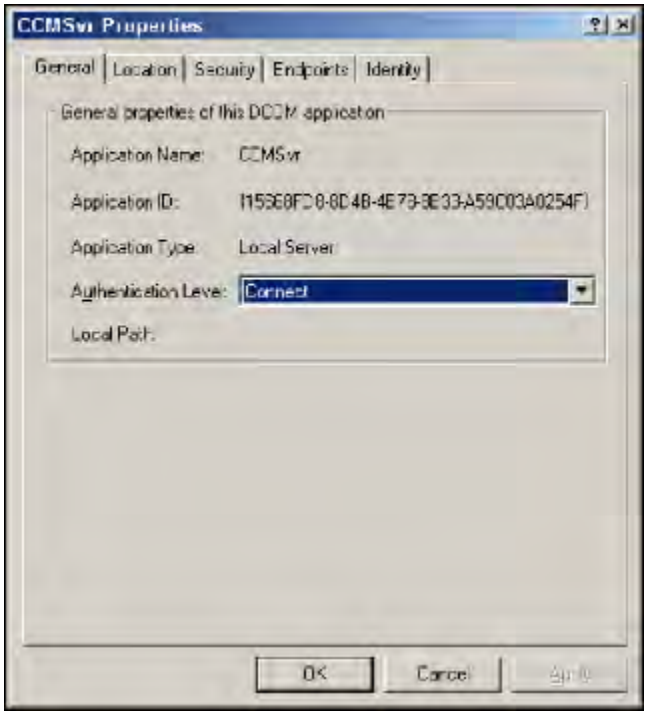
15. Select **OK** to close this window.

16. Open the **Component Services** window, and locate the **CCMSvr** server, as shown below.

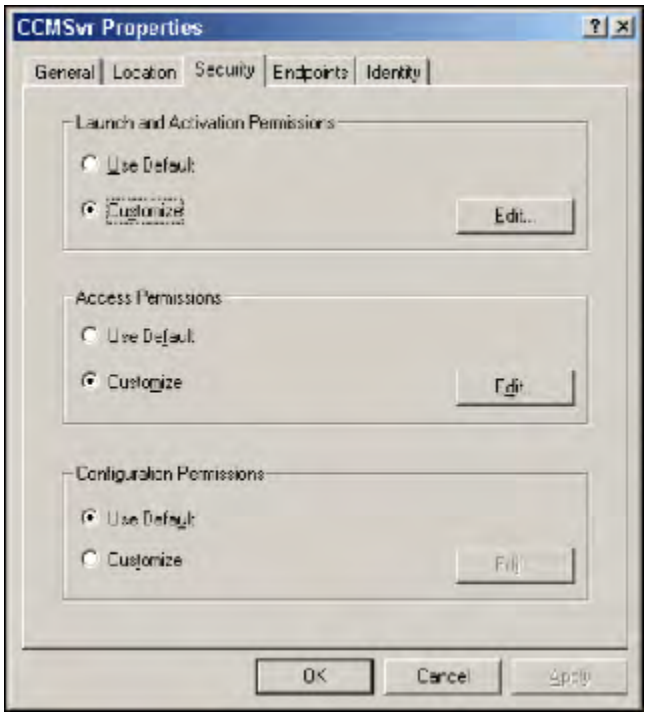


17. Right-click on **CCMSVr** and select **Properties** from the drop-down. The **CCMSvr Properties** window opens.

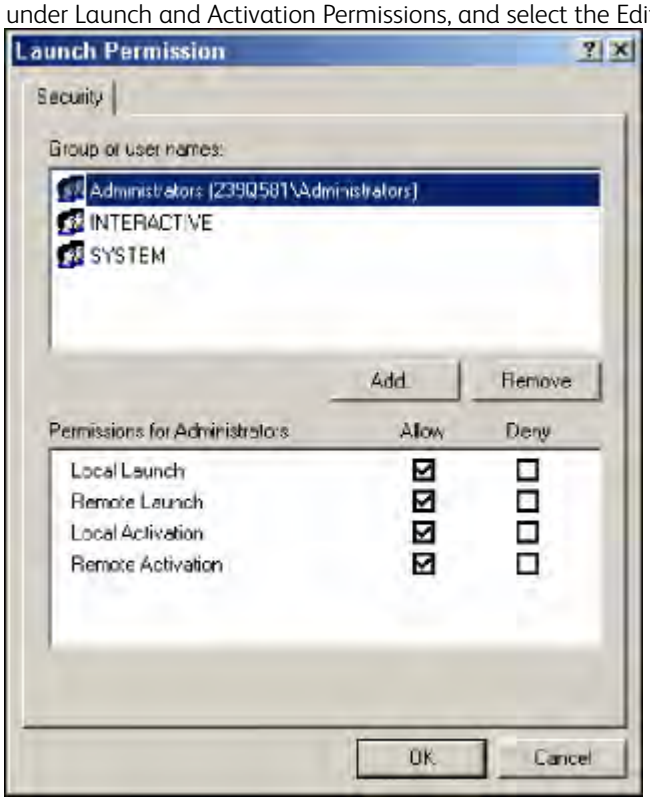
18. In the Authentication Level drop-down, select **Connect**



19. Select the Security tab.



20. Select the Customize radio button under Launch and Activation Permissions, and select the Edit button. The Launch Permission window opens.



21. Select the Add button to add Xerox FreeFlow Copyright Management Service Search Users to the list. Mark all the check boxes under Allow, and select OK.

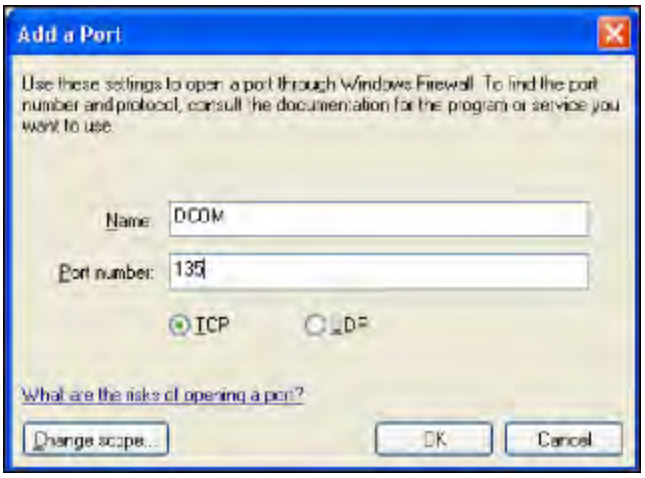
22. Select OK to close this window.
23. Select the Customize radio button under Access Permissions, and select the Edit button.
24. Add the CMSGroup to the Group or user names list, and mark all the check boxes under Allow.
25. Select OK to close this window.

26. Select the Identity tab, and select the This user radio button. Enter the user name and password for the Domain user under whose permission the CMS Server will be running. In the illustration below, the user is usx02592.

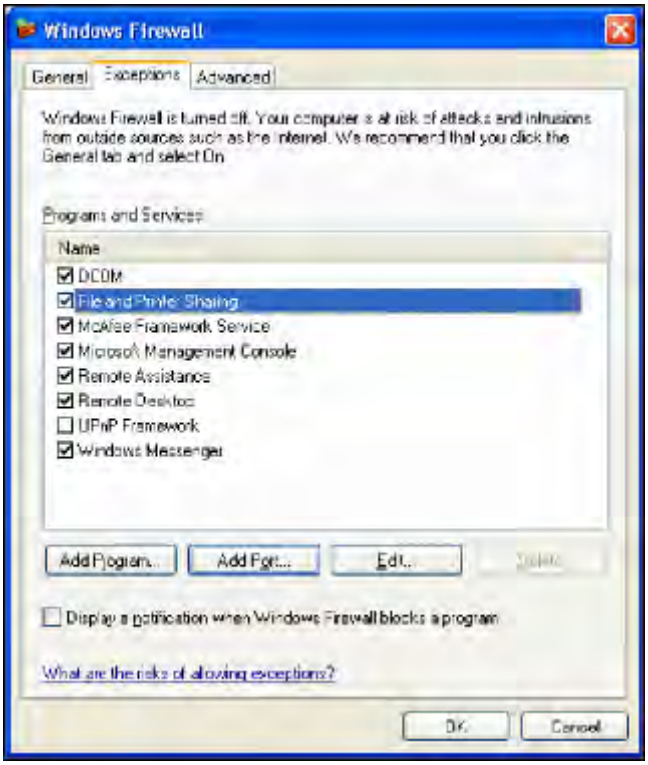
27. Select Apply and select OK to close all windows.

CONFIGURE THE FIREWALL FOR DCOM COMMUNICATIONS TO CMS SERVICE

1. Select **Start > Control Panel**.
2. Double-click on the Windows Firewall icon. The Windows Firewall window opens.
3. Select the **Exceptions** tab.
4. Select **Add Port**.The Add a Port window opens .
5. Fill in the DCOM in the Name text box and Port number fields as shown below .

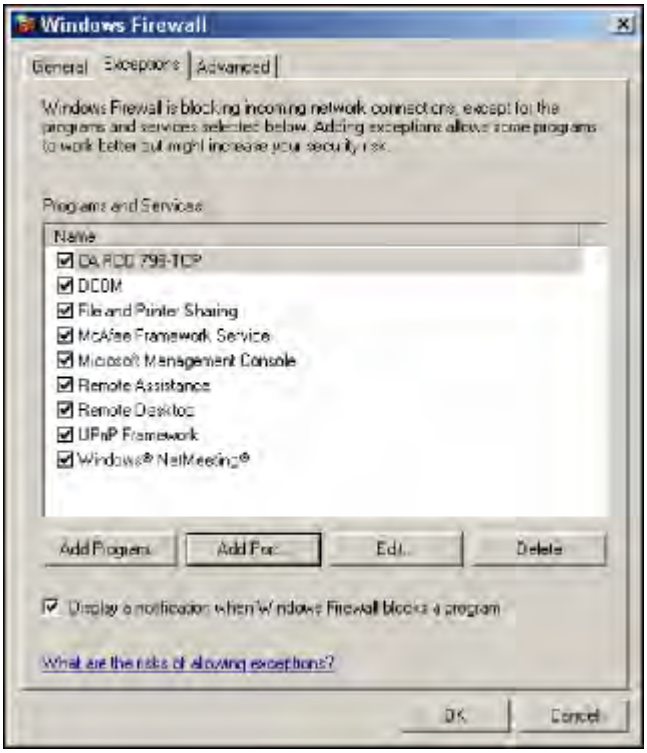


6. Select **OK**. The DCOM check box is marked, as shown below .

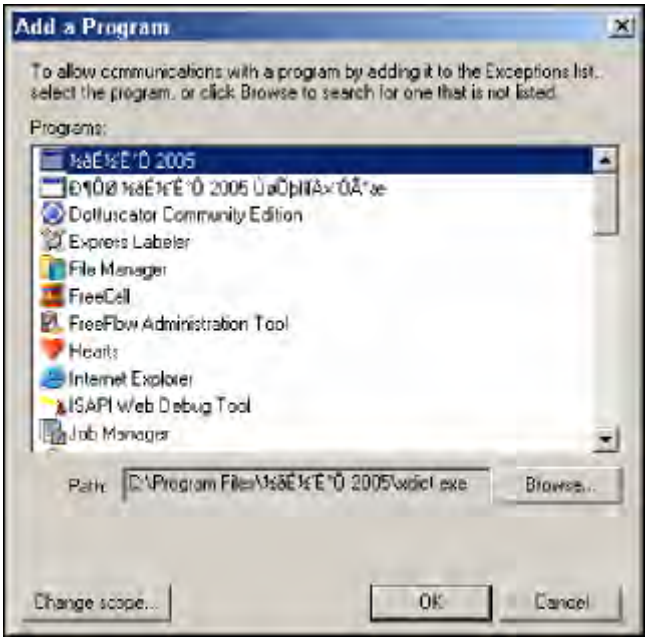


7. Select **OK**. This adds the DCOM port to the Windows firewall exceptions list.
8. Select **Start > Settings > Control Panel**, and then double-click on the Windows Firewall icon. The Windows Firewall window opens.

9. Select the **Exceptions** tab.

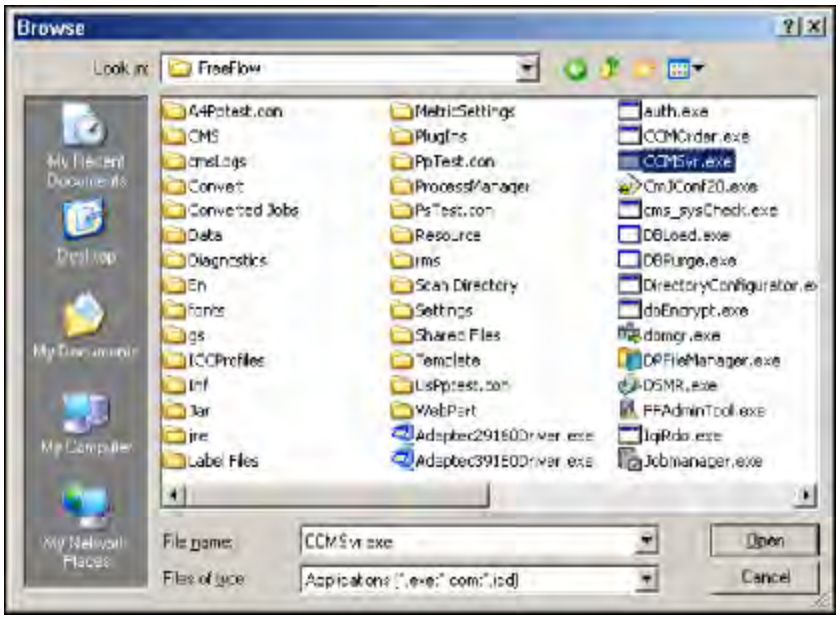


10. Select the **Add Program** button. The Add a Program window opens.

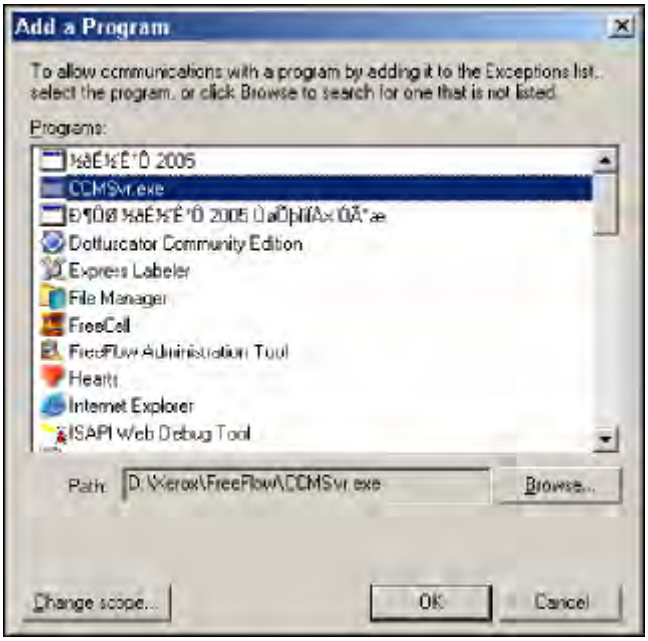


11. Click the **Browse** button.

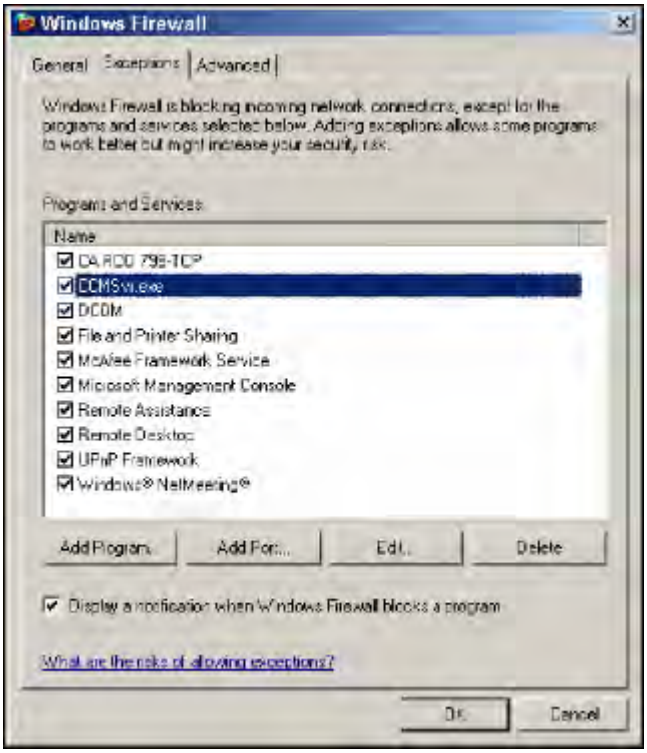
12. Locate the **CCMSvr.exe** file in the E:\freeflow directory.



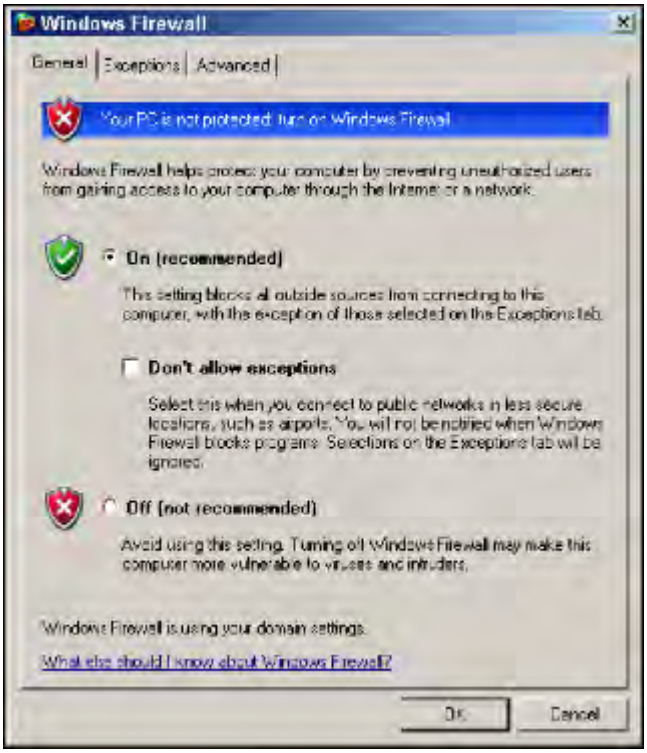
13. Select the **Open** button. This adds CCMSvr.exe to the Add a Program window, as shown below.



14. Select **OK**. The CCMSvr.exe file is added to the Windows Firewall Exceptions list, as shown below.



15. Select the **General** tab, select the **On** radio button,and select **OK** to enable the firewall.

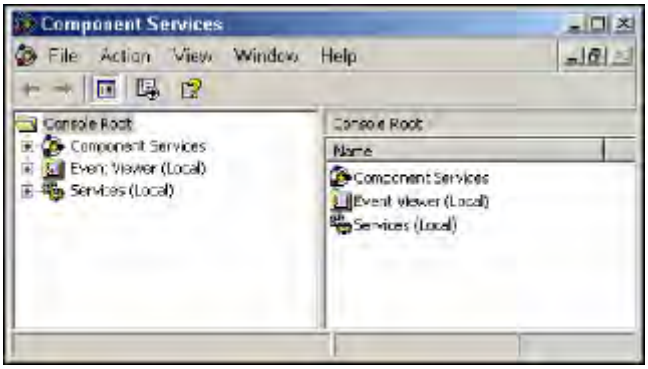


16. Close the Control Panel window. The CMS Server configuration is now complete.

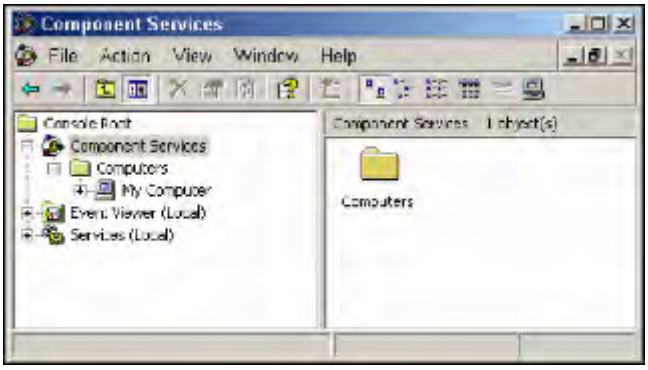
17. Restart the server machine.

CMS CLIENT MACHINE(MAKEREADY STATION) CONFIGURATION

1. Select **Start > Run**.
2. Enter <**dcomcnfg**> in the **Open** field, and select **OK**. The Component Services window opens.

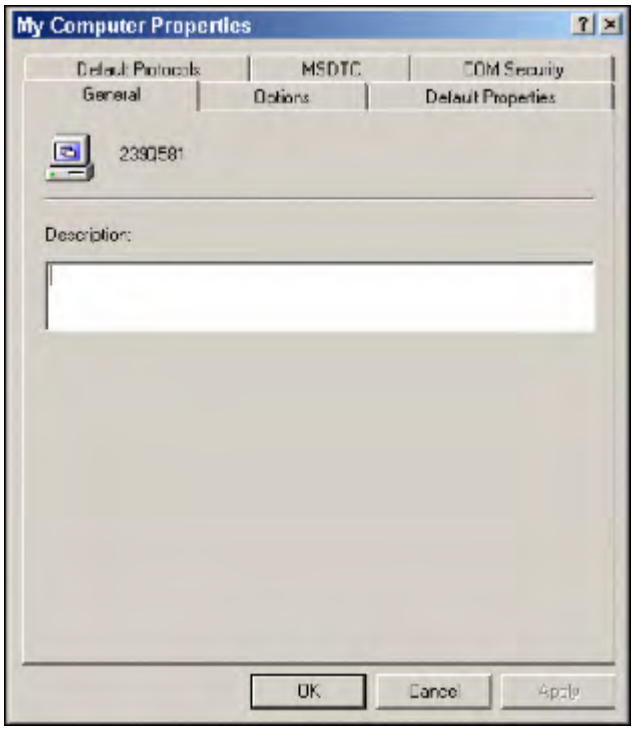


3. Click **Component Services** in the left pane. Click on the **+** sign next to Computers to show My Computer.

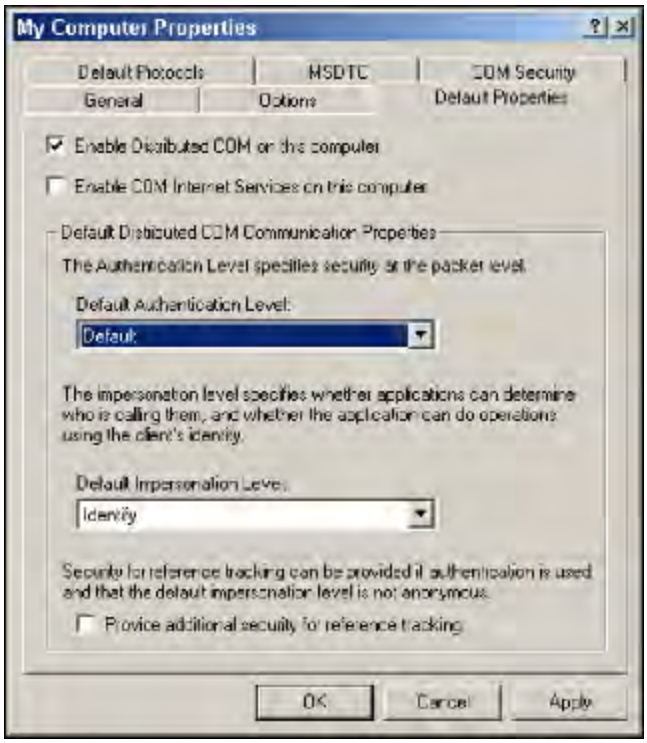


4. Right-click on **My Computer** and select **Properties** from the dropdown.

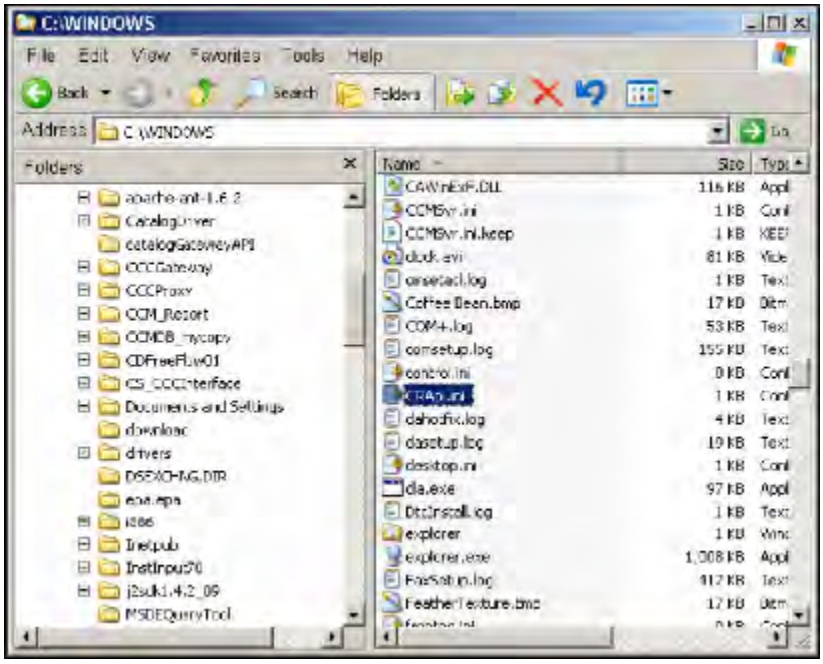
   The My Computer Properties window opens.



5. Select the **Default Properties** tab, and ensure that the **Enable Distributed COM on this computer** checkbox is marked, as shown below.



6. Open Windows Explorer. Locate the file **CRApi.ini** under C:\windows\.



7. Open the file CRApi.ini as text format. See the following:

   [CRApi]

   CRApiConnection=13.141.44.95

8. Change the value of CRApiConnection. Make it point to the IP Address of where the CCMSvr is running. In the above example, the IP address of the CCMSvris 13.141.44.95.
9. Save the CRApi.ini, and close the Windows Explorer window.

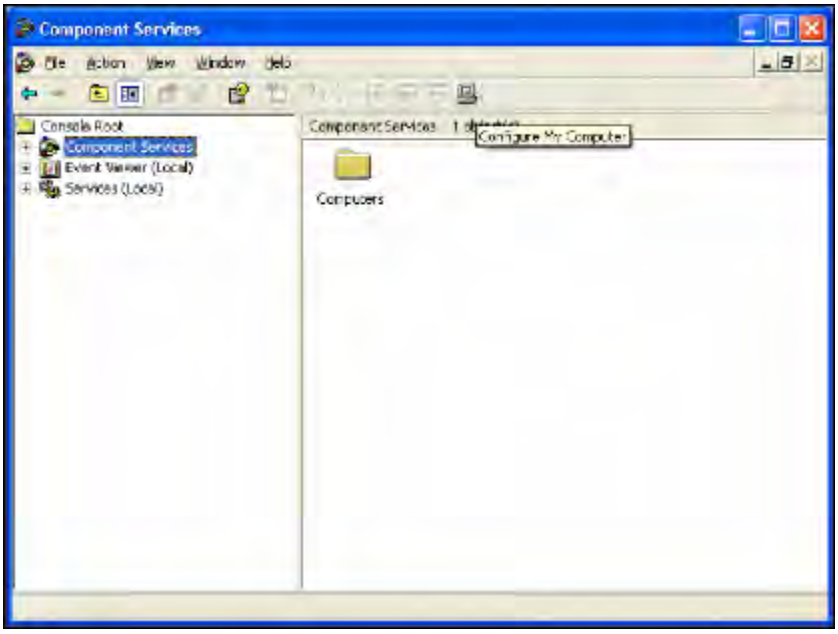
The CMS Client configuration is complete. You are ready to test the CMS Client working with the CMS Server. The best way to test it is by using "Quick Price" on the Makeready of the client machine.

Independent Workgroup Based Configuration

CONFIGURE DCOM SECURITY PROPERTIES AS WELL AS CONFIGURE DCOM ACCESS RIGHTS FOR "ANONYMOUS LOGON"

1. Select **Start > Run**.
2. Enter **<dcomcnfg>** in the **Open** field.

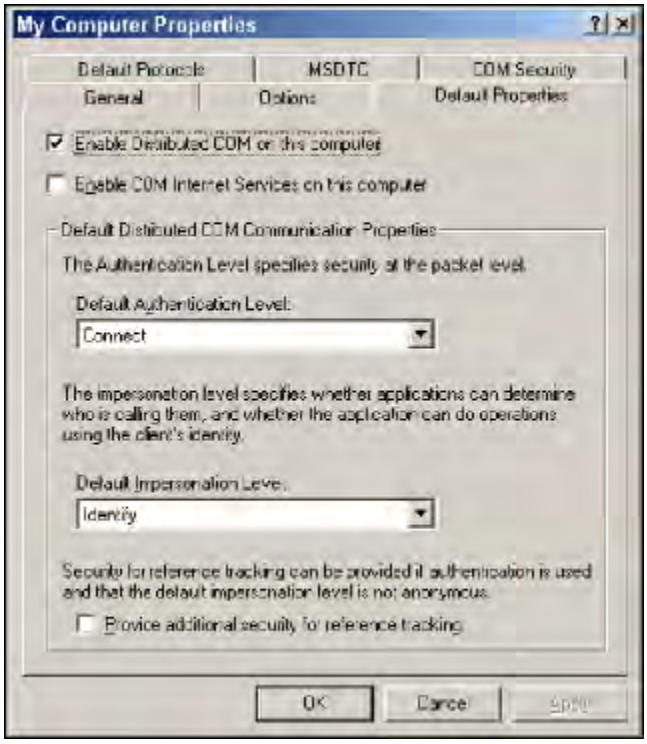
3. Select **OK**. The Component Services window opens.



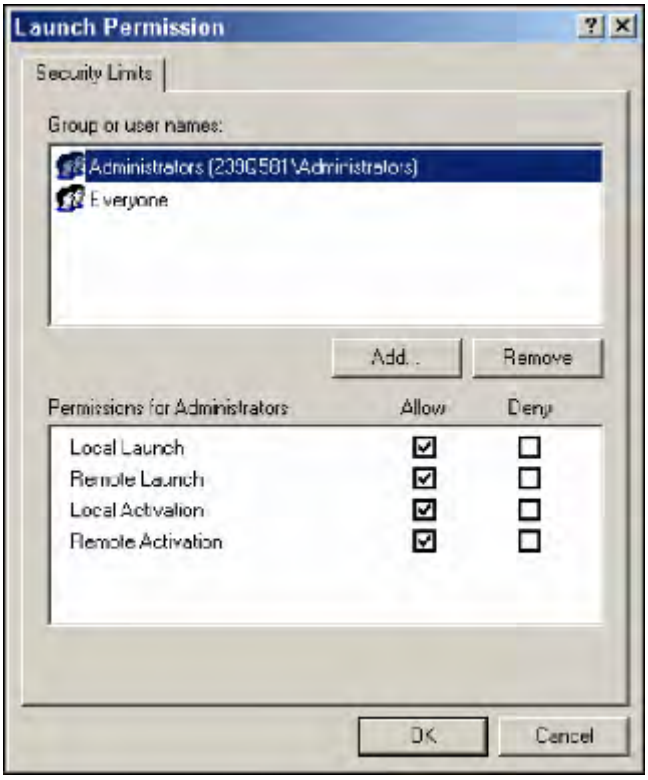
4. Select the Component Services node in the left pane, and then click on Computers. My Computer appears.

5. Right-click on **My Computer** and select **Properties**. The My Computer Properties window opens.

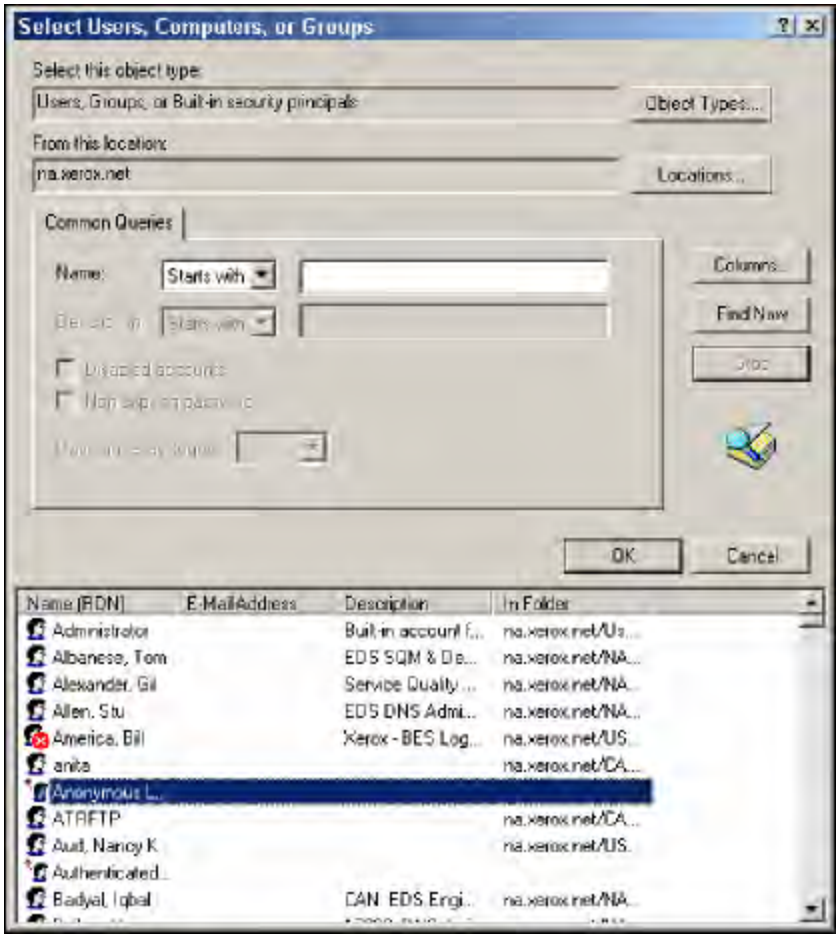
6. Select the **Default Properties** tab.
7. Select **Connect** from the Default Authentication Level drop-down. Select **Identify** from the Default Impersonation Level drop-down.



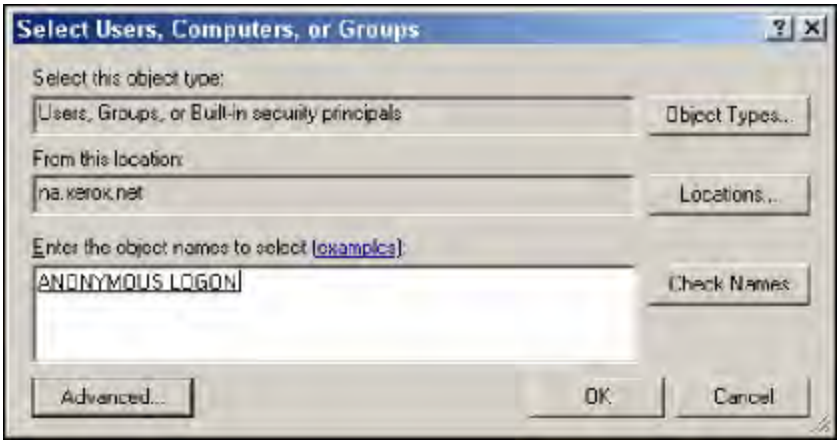
8. Select the **COM Security** tab.
9. Select the **Edit Limits** button under Launch and Activation Permissions. The Launch Permission window opens.



10. Select **Add**. Select the **Advanced** button in the window that opens to find the ANONYMOUS LOGON user name.



11. Select **OK** to add the ANONYMOUS LOGON to Select Users, Computers, or Groups.



12. Select **OK** to add the ANONYMOUS LOGON to the Group or user names list. Mark all check boxes under Allow, as shown below.

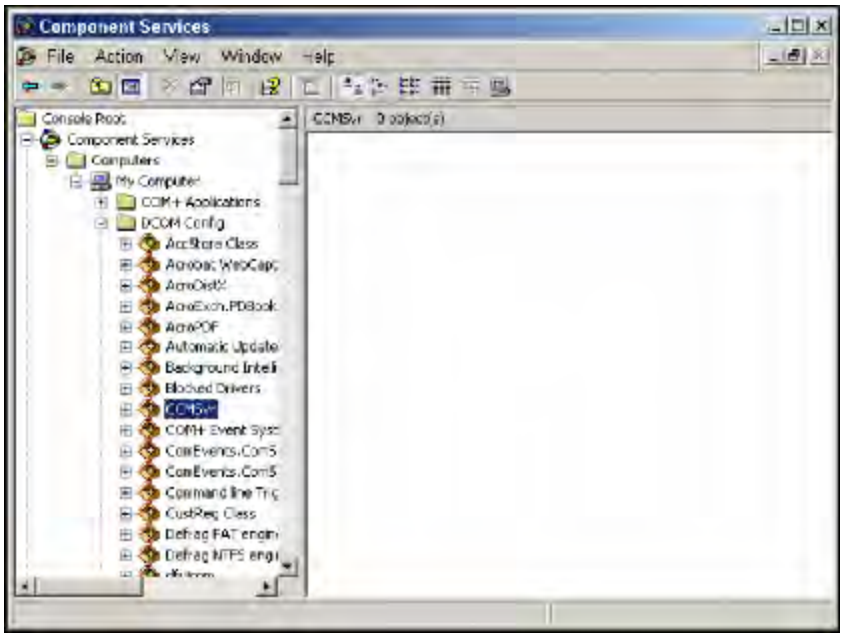
13. Select **OK** to close the Launch Permission window.

14. Select the **Edit Limit** button under Access Permissions.

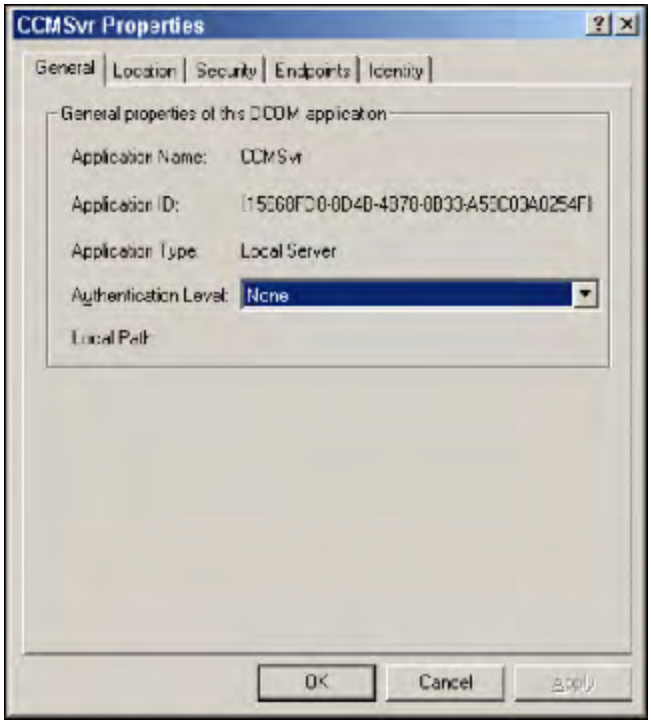
15. Select **Add** to add the ANONYMOUS LOGON to the Group or user names list.

16. Mark all the check boxes under Allow in the Permissions for ANONYMOUS LOGON area, as shown below.

17. Select **OK** to close the window of My Computer.
18. Open the Component Services window. Click **Component Services**, click **Computer**, and click **My computer**.
19. Click **DCOM Config**, and locate **CCMSvr**.

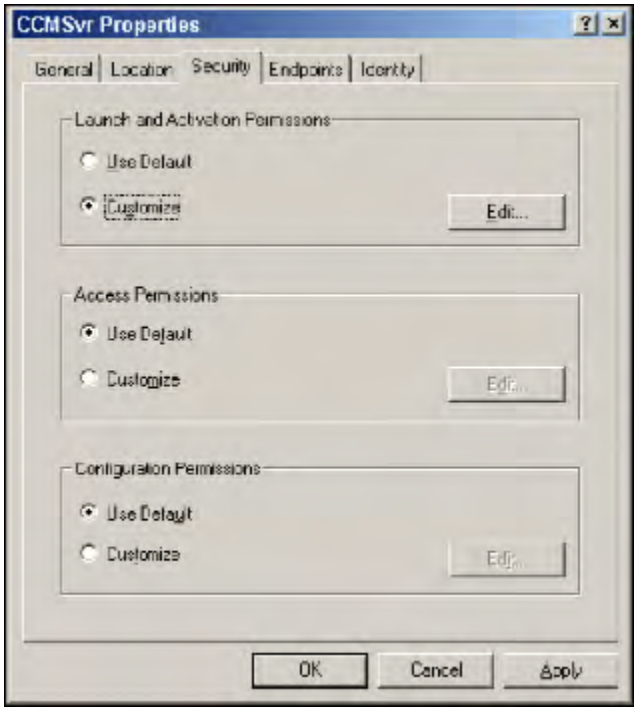


20. Right-click on **CCMSvr**, and select **Properties**. The CMSvr Properties window opens.
21. On the General tab, select **None** from the Authentication Level dropdown.



22. Select the **Location** tab, and make selections as shown below.

23. Select the **Security** tab. Select the **Customize** radio button under Launch Permissions, and click **Edit**



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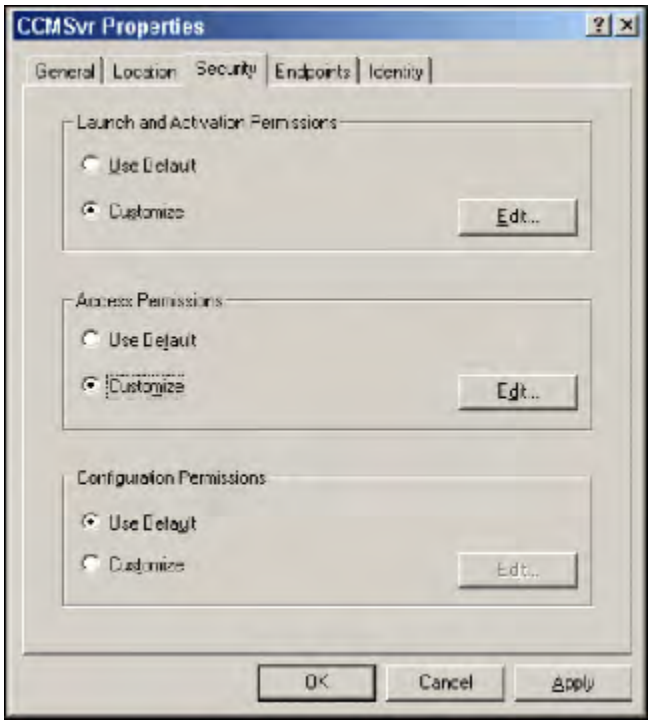
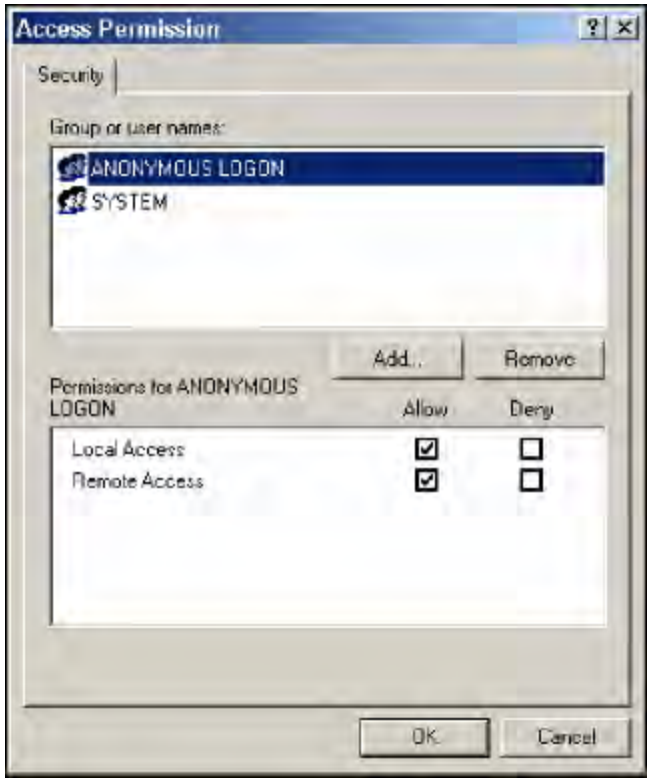
24. In the Launch Permission window, add the ANONYMOUS LOGON user to the Group or user names list by completing the same steps you took to add the ANONYMOUS LOGON to the Computer level. Mark all check boxes under Allow, as shown below.

25. Select **OK** to close the Launch Permission window.

26. Select the Security tab again. Select the **Customize** radio button under Access Permission, and click **Edit**.



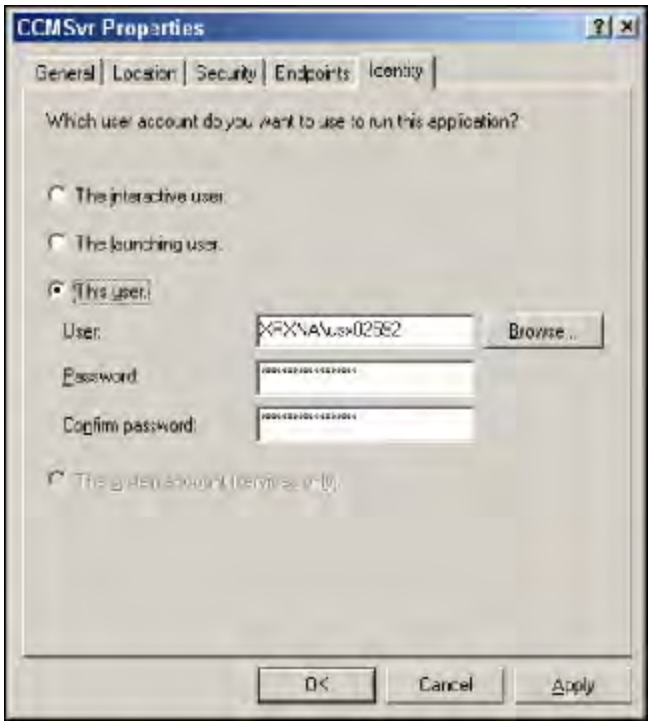
27. In the Access Permission window, add the ANONYMOUS LOGON user to the Group or user names list, and mark all the check boxes under Allow.



28. Select **OK** to close the Access Permission window.

29. Select the **Identity** tab. Select the **This user** radio button, and enter the User name and Password under whose account the CCMSvr will run.

Note: Make sure that this user has installed the Makeready and CMS Service, or that this user has the access rights to run both Makeready and CMS Service.

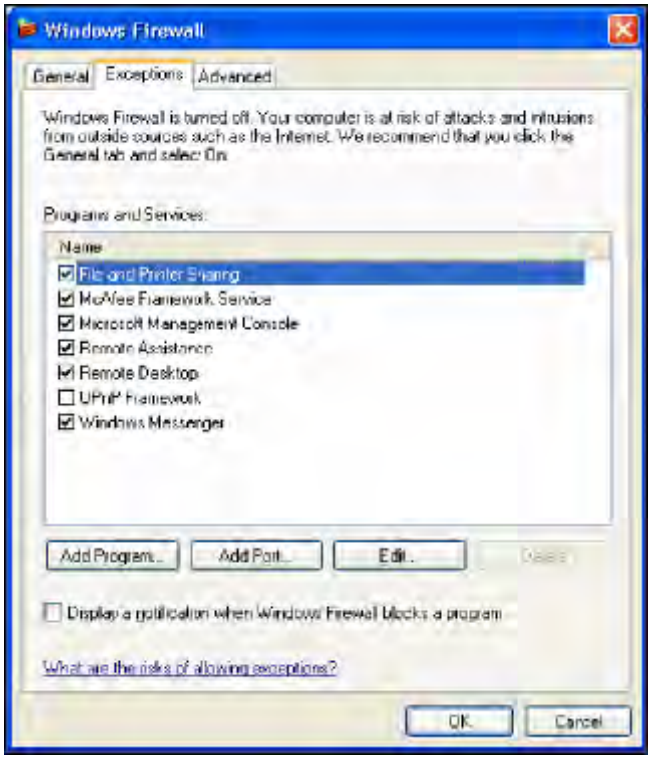


30. Select **Apply** and **OK** to close all windows of Component Services.

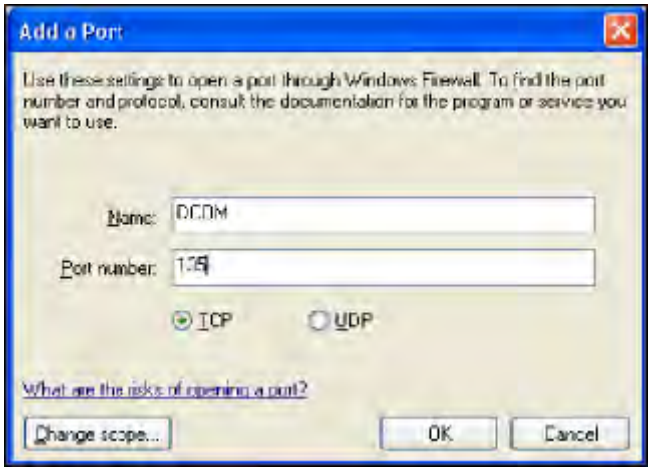
CONFIGURE THE FIREWALL FOR DCOM COMMUNICATIONS TO CMS SERVICE.

1. Select Start > Settings > Control Panel.
2. Double-click on the Windows Firewall icon. The Windows Firewall window opens.

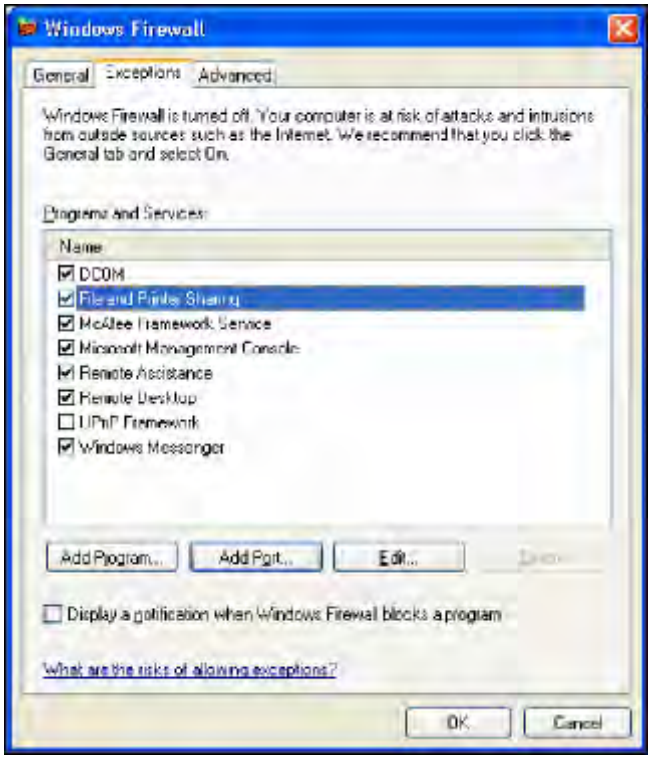
3. Select the Exceptions tab.



4. Select Add Port. The Add a Port window opens.
5. Enter <DCOM> in the Name field and <135> in the Port number field, as shown below.

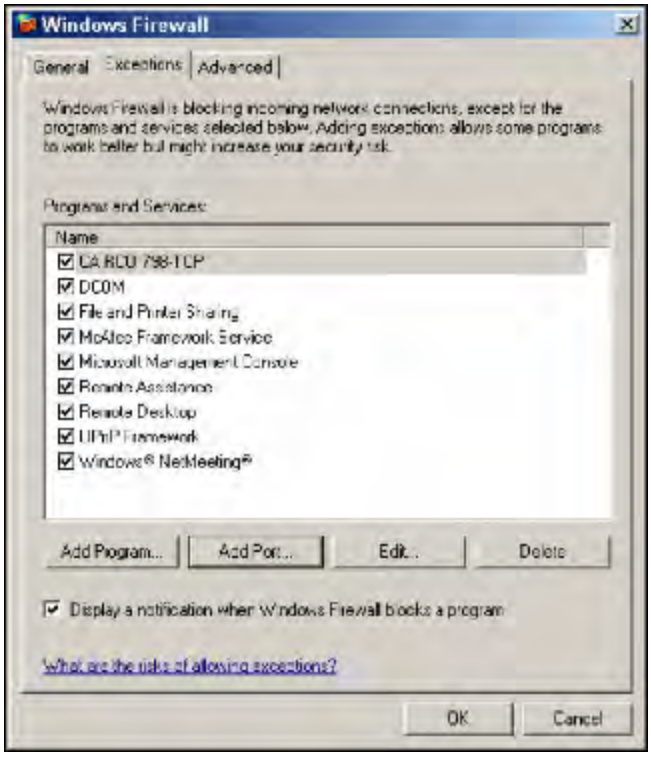


6. Select OK. The Windows Firewall window opens. Note that the DCOM check box is marked.



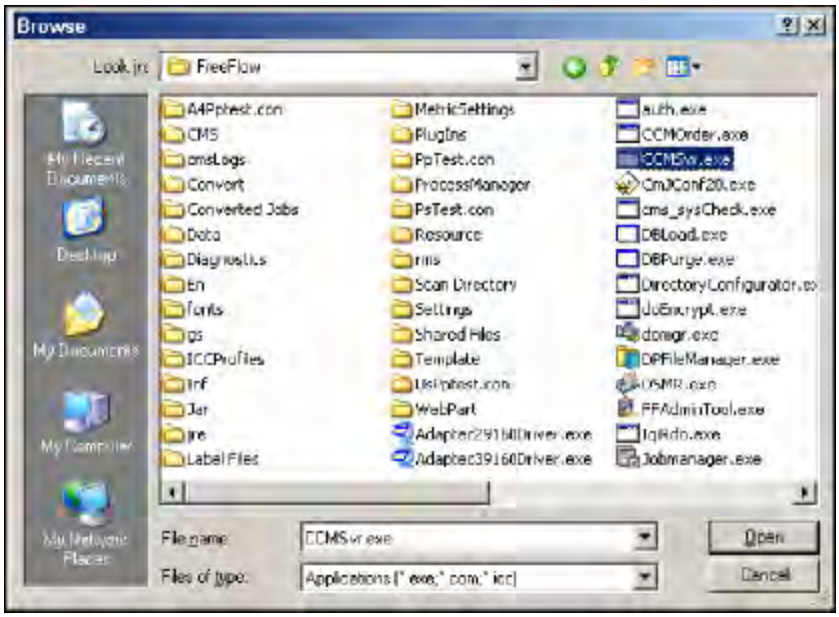
7. Select OK. This adds the DCOM port to the Windows firewall exceptions list.
8. Select Start > Settings > Control Panel.
9. Double-click Windows Firewall icon. The Windows Firewall window opens.

10. Select the Exceptions tab.

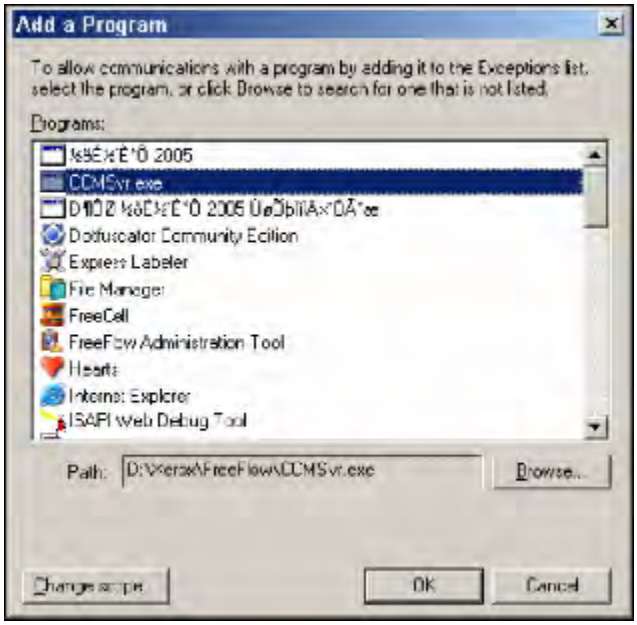


11. Select Add Program. The Add a Program window opens.

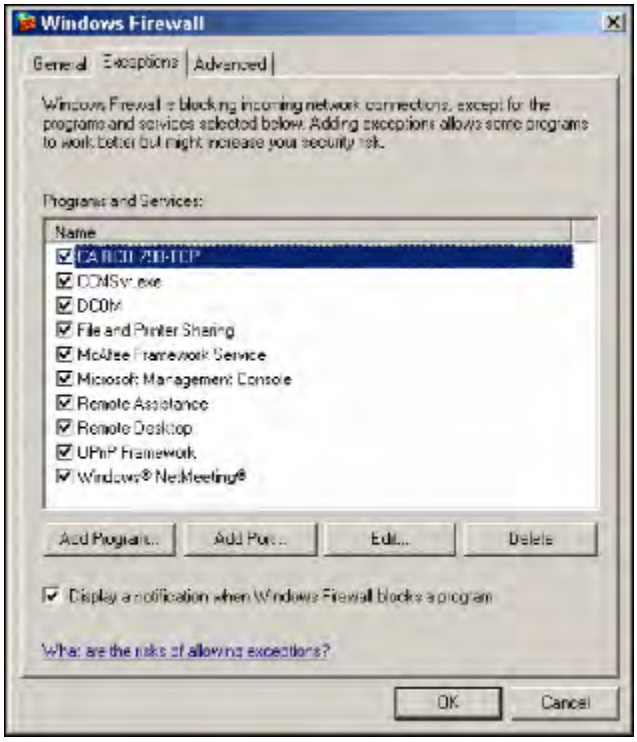
12. Click the Browse button. In the Browse window, locate and select the file CCMSvr.exe in its directory (for example, E:\FreeFlow).



13. Select Open. This adds CCMSvr.exe to the Add a Program window list.



14. Select OK. This adds CCMSvr.exe, which its check box marked, to the Windows Firewall Exceptions list.



15. Select the General tab. Select the On radio button.

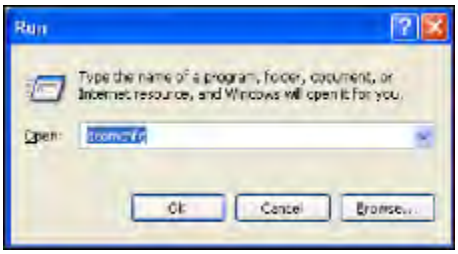
16. Select OK to enable the firewall.

17. Close the Control Panel window. The server configuration is now complete.
18. Restart the server machine.

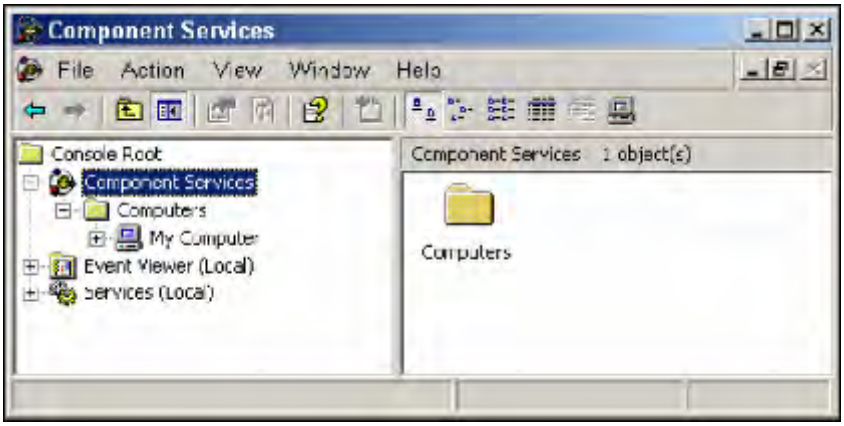
CONFIGURE DCOM SECURITY PROPERTIES ON THE CMS CLIENT MACHINE

On the Client Machine:

1. Select **Start > Run**.
2. Enter **<dcomcnfg>** in the Open field, and select **OK**.

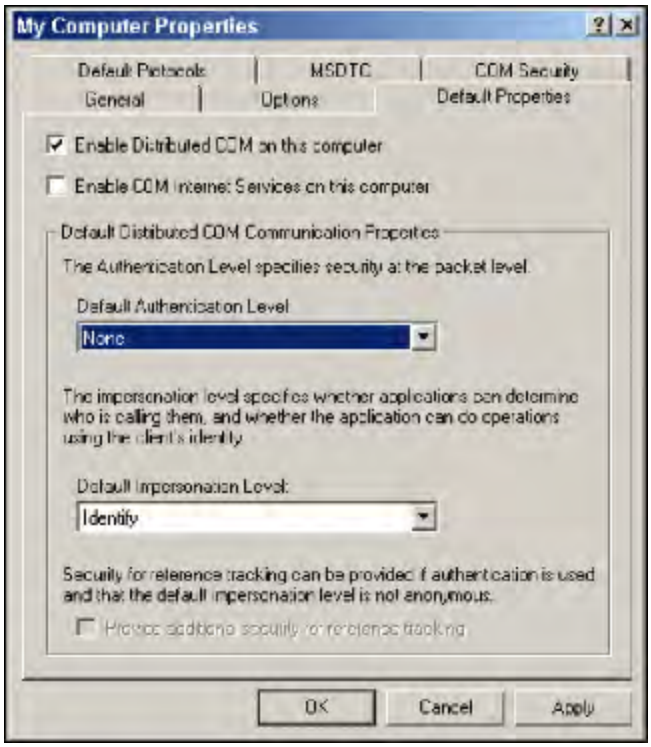


3. In the Component Services window, select the **Component Services** node in the left pane, and click the + sign next to the Computers folder. The My Computer icon appears.



4. Right-click on **My Computer** and select **Properties** from the dropdown. The My Computer Properties window opens.

5. Select the **Default Properties** tab. **Mark the Enable Distributed COM on this computer** check box, if it is not already marked.



6. Select **Apply** and select **OK** to close all windows.
7. Open the file CRApi.ini as text format. See the following: [CRApi] CRApiConnection=13.141.44.95
8. Change the value of CRApiConnection. Make it point to the IP Address of where the CCMSvr is running. In the above example, the IP address of the CCMSvris 13.141.44.95.
9. Save the CRApi.ini and close the Windows Explorer window.
10. Now the client's machine configurations steps are completed.

Repeat the same process for each CMS Client machine.

Field Names and Usage

This appendix contains:

- Course Title – User-entered title of the course. This title is the title of the coursepack.
- Course Number – User-entered number for the course.
- Course Start Date – User-entered start date when pages having copyright protection will be distributed. This could be the start of the semester for a university or college.
- Requestor Name – User-entered name of the person requesting this document.
- Requestor Phone – User-entered phone number of the person requesting this document.
- Requestor Email – User-entered email of the person requesting this document.
- Organization – User-entered organization of the person requesting this document.
- Department – User-entered department of the person requesting this document.
- Comment – User-entered comments.
- Operator name – Person who was logged in at the Makeready at the time of creation of this coursepack.
- Reference Number – User-entered number that will be associated with this document.
- Status – Status of the document. The status can be NEW or DELETED (the user has canceled this coursepack but has not removed it from the database).
- Creation Date – Date of creation using FreeFlow Makeready.
- Modification Date – date of last modification. Appendix: Field Names and Usage Copyright Management 9-2 Copyright Management User Guide
- Section Details: The following information is provided for each section in the document.
- Record Status – This section may be New or Deleted.
- Order Status – The status can be granted, denied, pending, contact rights holder directly, or ordered (for manual orders).
- Manual Order – Yes or no where yes represents user-supplied copyright information. On Makeready, the Manual Order radio button is selected.
- Customer Reference Number – User-entered number that will be associated with this section.
- ISBN/ISSN number – Unique identifier for this section.
- Article Name – Title of this section
- Publication Title – Title of the publication from which this section was derived.
- Publisher – Publisher of the publication.
- Publication Year – Publication year of the publication.
- Author – Author or editor name for the publication.
- Date of Issue – Date of issue for the publication.
- Volume number – volume number for the publication.
- Edition – Edition of the publication.
- Total Pages – Number of total pages in this section that have copyright protected information.
- Start page – Page number of first page of the section that has copyright protected information.
- End Page – Page number of the last page of the section that has copyright protected information.
- Order Placed Date – Date the order was selected by the user on Makeready.

- Order Completed Date – For those orders that require processing, the date that the response for that order request was received. For Manual Orders, it is the date Order was selected by the user on Makeready. Copyright Management Appendix: Field Names and Usage Copyright Management User Guide 9-3
- Creation Date – Date the Section was created and OK was on Makeready.
- Modification Date – Last date the order was modified.
- Order Head ID – References identifiers provided by the Copyright Clearance Center for tracking that order.
- Order Detail ID – References identifiers provided by the Copyright Clearance Center for tracking that order.
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