

Licenses

How are license records managed in Alma?

Alma features a dedicated license management module which conforms to the DLF-ERMI standard. In addition to these standard license fields libraries may also add their own library defined fields to the license record:

The screenshot shows the 'Add License Term' form. It has several input fields: 'Name *', 'Code *', 'License Term Type *' (with a search icon and 'Look-up or select' text), 'License Section', and 'Order In Section'. The 'Order In Section' dropdown is open, showing options: 'FREE-TEXT', 'NUMERIC', 'LicenseTermsYesNo', and 'LicenseTermsPermittedProhibited'. There is also a 'Display To Public' checkbox. At the bottom right, there are three buttons: 'Add', 'Close', and 'Add and Close'.

Libraries can customize the staff-facing user interface forms so that only relevant license terms display to staff.

Alma enables staff to quickly and easily create a license record that captures detailed information about the terms of a license or contract. It also enables the creation of an addendum or amendment for a license which serves to identify additional titles covered by the existing license (e.g., when a library adds new titles and overall license terms do not change), or to modify the terms associated with a particular resource or group of resources.

The License Details in Alma is comprised of several tabs:

- A summary tab, which gives information such as the name, status, and start and end dates of the license;
- A License Terms tab, which gives information regarding the Terms of Use, Restrictions, Perpetual Rights, etc. of a license;
- An Inventory tab, which lists the active and historical packages associated with the license;
- A PO Lines tab listing all PO Lines linked to the license
- An Amendments tab link amendments to the master license record
- A History tab recording all changes made to the license record
- A Notes tab for registering notes about the license
- An Attachments tab for where electronic versions of the license can be uploaded

An example of the inventory tab on the license record:

Resource Name	Active From
1 Gale Cengage Communications & Mass Media Collection	03/24/2013
2 Gale Cengage Computer Database	12/14/2011
3 Gale Cengage Criminal Justice Collection	12/11/2011
4 Gale Cengage General Business File ASAP	11/04/2014
5 Gale Cengage General Science Collection	12/08/2015
6 Gale Cengage Insurance and Liability Collection	01/23/2017
7 Gale Cengage LegalTrac	09/10/2015
8 Gale Cengage Pop Culture eCollection	12/14/2015
9 Gale Cengage Popular Magazines	10/27/2015
10 Gale Cengage Psychology Collection	12/11/2011
11 Gale Cengage Religion Philosophy Collection	03/24/2016
12 Gale Cengage Vocations and Careers Collection	10/08/2015


An example of the Notes tab:


Created On	Updated On	Updated By	Note
1 11/26/2015	11/26/2015	Hannah Wagner	John from finance told me that in the coming days we will receive new terms and should upload them to the license.
2 03/26/2015	03/26/2015	Anna Allen	What would we do with the new fields on the summary tab?
3 12/22/2011	12/22/2011	Jim Benson	Have they sent the amended terms yet?
4 12/12/2011	12/12/2011	Super User	What happens regarding the addition of new portfolios? Are they automatically added
5 12/12/2011	12/12/2011	John Evans	I think Anne already wrote to them
6 12/12/2011	12/12/2011	Cathy Owen	We need to check the original terms of the print copy

Alma supports managing licenses and amendments, including active dates, statuses associated with the negotiation process, notes, and an audit trail of edits. Staff may also upload one or more digital files to a license, which may then be viewed at any time through Alma. The following image shows the ease of use of uploading digital licenses:

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
1 License.pdf	application/...	114.9...	Mary Ann Barlow	12/14/2015 04:15	https://www.almauniversity.../Electronic/Gale/License.pdf	Primary license agreement	Uploaded
2 Gale license agree...	application/...	42.5Kb	Mary Ann Barlow	12/14/2015 04:12	http://www.almauniversity.e.../providers/restrictions/Gale%20license%20agree...	Amendment to previous license terms	Uploaded

In the repository search, a staff operator can easily navigate to the license details of a particular electronic resource by clicking on the "Other Details" hyperlink in the record.

13  **Gale Cengage General Academic ASAP International**

Type: Aggregator package  **Orders: 1**

Services: Full Text (Available)

Interface Name: Galegroup

Linking Level: Article

Creation Date: 2016-08-10 00:43:23

Modification Date: 2016-08-10 00:43:23

Process type: Acquisition

Available For Other details

Related Records	0
Orders	1
Licenses	1
Courses	0
Reminders	0

The license management functionality is seamlessly integrated into the acquisitions process, making it simple for library staff to conduct trials, place orders, activate, evaluate, and renew electronic resources in an ongoing cycle:

Summary and Inventory Information

Electronic Collection type Aggregator package

Interface Description

Process type **Acquisition**

Access type Current Perpetual

Acquisitions and License Information

PO Line POL-44737 X ☰

Activation date **08/23/2016**

License Gale X ☰ ↻

It is also possible for the library to configure and display license terms to end users in the Primo discovery interface. The library determines the information that is displayed:

Full text available at: [Gale Cengage Academic OneFile](#) Hide license ^

Available from 1993 until 2007

License Terms

- Walk in User Note: Walk in use allowed
- Concurrent User: 10
- Course Reserve Electronic Copy: Permitted
- Digitally copy: Prohibited
- Print copy: Permitted
- Scholarly sharing: Uninterpreted
- Distance education: Permitted
- Interlibrary loan print or fax: Not Applicable
- Interlibrary loan electronic: Permitted
- Interlibrary loan secure electronic transmission: Permitted
- Interlibrary loan record keeping required indicator: Yes

Does Alma support amendments to licenses?

Alma supports the option for creating amendments to a license. The amendment will be linked to the original license record, but can be populated with all the elements relevant for license definition – e.g. defining license terms, license status, etc.

Name	License code	License type	Licensor Code	Status	Review Status	Start date	End date	Signed on
1 Gale	GALE1	Amend...	0-011	Active	Accepted	12/11/2011	-	11/01/2011
2 Gale 2015 Amendment	GALE2015	Amend...	0-011	Active	Accepted	08/18/2015	-	08/18/2015

The default status values for licenses are:

- Active
 - The license is activated and in use
- Deleted
 - Marks the license as deleted. Deleted licenses can be re-activated. Relevant only when updating an existing license.
- Draft
 - The license is created but not in use
- Expired
- Retired

In the History tab, users can view changes to licenses.

Date	Operator	Field Name	Old Value	New Value
1 05/10/2017 22:44	Marliese Thomas	Signed by	Anna Allen.A	Marianne Thomas
2 02/01/2016 08:10	Super User	Signed on	2011-11-01	2015-11-01
3 11/29/2015 20:37	Andrew French	Signed by	-	Anna Allen.A
4 10/03/2015 18:12	Super User	End date	2016-07-01	-
5 10/02/2015 15:04	Hannah Wagner	End date	-	2016-07-01

Can templates be created as a basis for defining new license records?

A license can be saved as a license template or a license negotiation template. Saving a license as a template saves the license summary, license terms, group settings, and administrators information for use when creating a new license or a new negotiation license.

Electronic portfolios Title Advanced

License Details Save as template Print license Cancel Save

Gale 1

Creation date 12/11/2011 Created by Cathy Owen License type License

Summary License Terms Inventory PO Lines Amendments Group Settings Administrators History Notes Attachments

<p>Name * Gale</p> <p>License status Active</p> <p>Signed by Jim Benson -ezec</p> <p>Second party's Signed by</p> <p>Start date * 12/11/2011</p>	<p>License code * GALE</p> <p>Licensor 0-011</p> <p>Signed on 11/01/2015</p> <p>Second party's Signed on</p> <p>End date</p>
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Does license management include fields for signatory and signing date?

Alma supports these fields. Please see the screenshot below:

The screenshot shows a license record form with the following fields:

- Name: Gale
- License status: Active
- License code: GALE
- Licensor: 0-011
- Signed by: Marianne Thomas
- Signed on: 11/01/2015
- Second party's Signed by: (empty)
- Second party's Signed on: (empty)

Does Alma create an audit trail of changes made to a license?

Alma tracks all changes made to a license in the History tab of the license record:

The screenshot shows the History tab of the license record. The report type is set to "License changes". The audit trail table is as follows:

Date	Operator	Field Name	Old Value	New Value
1 05/10/2017 22:44	Marliese Thomas	Signed by	Anna Allen.A	Marianne Thomas
2 02/01/2016 08:10	Super User	Signed on	2011-11-01	2015-11-01
3 11/29/2015 20:37	Andrew French	Signed by	-	Anna Allen.A
4 10/03/2015 18:12	Super User	End date	2016-07-01	-
5 10/02/2015 15:04	Hannah Wagner	End date	-	2016-07-01

Changes either of the license or the license terms can be viewed as show in the the screen capture above.

Can digital copies of license agreements be uploaded and stored in Alma?

Staff may upload one or more digital files to a license record, which may then be viewed and/or downloaded at any time:

The screenshot shows the Attachments tab of the license record. The table lists the following attachments:

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
1 License.pdf	application/...	114.9...	Mary Ann Barlow	12/14/2015 04:15	https://www.almauniversity.../Electronic/Gale/License.pdf	Primary license agreement	Uploaded
2 Gale license agree...	application/...	42.5kb	Mary Ann Barlow	12/14/2015 04:12	http://www.almauniversity.e.../providers/restrictions/Gale%20license%20agree...	Amendment to previous license terms	Uploaded

Can licenses be retrieved by specific criteria?

The list of licenses can be filtered - for example by status (as seen in the following screen capture). Specific licenses can be retrieved using the search function. The Advanced Search option allows for retrieving licenses by a number of different parameters:

Licenses and Amendments

1 - 20 of 46

Status :

Name ▲	
1	AIP
2	AIP
3	Alexander

- All
- Active
- Deleted
- Draft
- Expired
- Retired

1 - 20 of 46

Status : All Review Status :

Name ▲	
1	AIP
2	AIP
3	Alexander

- All
- Pending
- Accepted
- Rejected
- In review

Licenses ▾

🔍 Look-up or select ▾

Licenses ▾

- License Code
- Licensor
- Name
- Start date
- End date
- Signed on date
- Review Status
- License Terms >

How can license terms be displayed or suppressed from public view?

Library staff are able to configure and display license terms to end users in the Primo discovery interface. The configuration table allows for defining the license terms that will display to the public.

	Name	License Term Type	License Section	Display To Public
1	Accessibility compliance indicator	LicenseTermsYesNo	<input type="text"/>	Yes ▾
2	All rights reserved	LicenseTermsYesNo	Terms of Use ▾	No ▾
3	Applicable Copyright Law	FREE-TEXT	<input type="text"/>	Yes ▾
4	Archiving right	LicenseTermsYesNo	Perpetual R ▾	No ▾
5	Archiving format	FREE-TEXT	<input type="text"/>	Yes ▾
6	Archiving note	FREE-TEXT	<input type="text"/>	Yes ▾
7	Authorized User Definition	FREE-TEXT	<input type="text"/>	Yes ▾
8	Citation requirement detail	FREE-TEXT	Terms of Use ▾	Yes ▾
9	Clickwrap modification clause indicator	LicenseTermsYesNo	<input type="text"/>	Yes ▾

The library determines the fields that display in the “View It” tab of a search record’s results

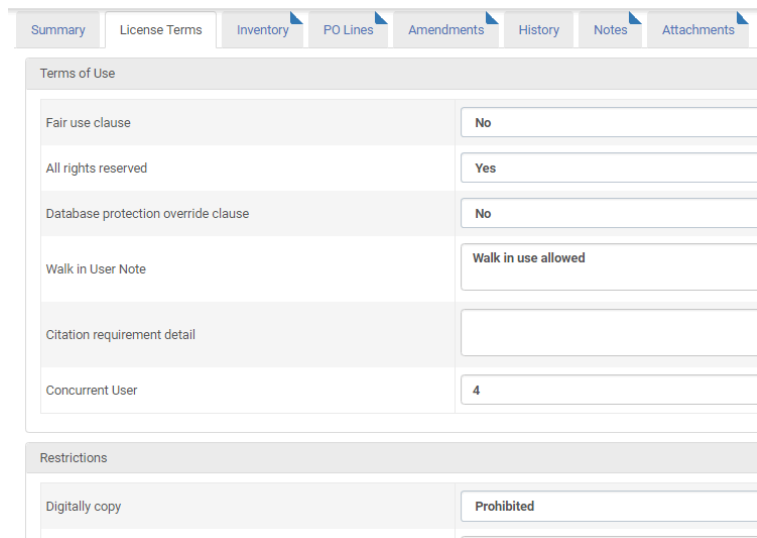
License Terms

- Walk in User Note: Walk in use allowed
- Concurrent User: 10
- Course Reserve Electronic Copy: Permitted
- Digitally copy: Prohibited
- Print copy: Permitted
- Scholarly sharing: Uninterpreted
- Distance education: Permitted
- Interlibrary loan print or fax: Not Applicable
- Interlibrary loan electronic: Permitted
- Interlibrary loan secure electronic transmission: Permitted
- Interlibrary loan record keeping required indicator: Yes

Can Alma display only those fields that the library uses and not the rest?

License configuration in Alma allows for the non-display in the license record of unwanted fields.

An example of customized licensing elements can be seen below:



The screenshot shows the Alma license configuration interface. At the top, there are tabs for 'Summary', 'License Terms', 'Inventory', 'PO Lines', 'Amendments', 'History', 'Notes', and 'Attachments'. The 'License Terms' tab is selected. Below the tabs, there are two main sections: 'Terms of Use' and 'Restrictions'. The 'Terms of Use' section contains several fields with dropdown menus: 'Fair use clause' (No), 'All rights reserved' (Yes), 'Database protection override clause' (No), 'Walk in User Note' (Walk in use allowed), 'Citation requirement detail' (empty), and 'Concurrent User' (4). The 'Restrictions' section contains one field: 'Digitally copy' (Prohibited).

Does Alma support loading licenses in ONIX-PL format?

Alma supports the integration of ONline Information eXchange for Publication Licenses (ONIX-PL) with license standards that conform to Digital Library Federation (DLF) standards. Alma maps fields from the ONIX-PL XML file to fields in the DLF-based license template.

Fields that are mapped from ONIX-PL take on the attributes and characteristics of the DLF fields (such as Order and whether or not a field appears in the license itself), as configured by the Alma Acquisitions Administrator. Thus a field that has been mapped from ONIX-PL to Alma may not show in the license even though it is in use, depending on the settings of the DLF field to which the ONIX-PL field is mapped.

Total views:

5548