

Alma Essentials -- Acquisitions Licenses

Welcome to this training session on acquisitions in Alma. In this session, you'll learn about licenses, and how to create them in Alma.

Many electronic resources require licenses from the vendors that provide the resources. Alma's functionality does not change based on license information; instead, you enter that license information into Alma for tracking and informational purposes. That way, the original license can be filed for safekeeping, and anyone at your institution can find the license information by looking in Alma instead. Also, if your institution uses Primo VE, you can configure it to display the relevant license terms to patrons. See the Primo VE training and documentation for more details.

To add a license, select Alma's Acquisitions menu and, in the Acquisitions Infrastructure section, select Licenses. By the way, you need the Alma role of License Manager to be able to add a license. On the Licenses and Amendments page, click Add License. If someone at your institution has created a license template for this vendor, you can start by loading one of those templates, to save yourself some work. If the vendor has provided to you an XML file using the standard format for Online INformation eXchange for Publication Licenses, or ONIX-PL, then choose that option. For this example, choose Manually.

The mandatory fields for a license are the Name, the License code, and the Start date. You will probably want to add the Licensor, and the list shows those vendors that have been configured with a Vendor Type of Licensor. The Signed by fields can be populated from the list of Alma users at your institution. Use the License review status field to track the status of a license that hasn't yet been accepted and signed by your institution.

On the License Terms tab, enter the terms from the license you received from the vendor. The terms are organized into several groups, including Terms of Use, Restrictions, Perpetual Rights, and more. Some fields contain a drop-down menu of choices, and other fields are for entering text. By the way, if the vendor's license contains terms that don't appear on this list, someone at your institution with the Acquisitions Administrator role can change the license configuration to add those terms.

For more details on all the fields in a license, see the documentation in the Knowledge Center.

The Inventory tab will start filling up after you assign this license to various e-resources, either at the portfolio level or the collection level.

The Purchase Order Lines tab will eventually list all the places you added this license as part of a purchase.

The other tabs are not as commonly used; details are available in documentation.

Back on the Summary tab, if you save this license as a template, then next time you need to create a license from this vendor, you'll be able to choose this template and save time filling out the rest of the license.

When you are done, click Save.

Back at the Licenses and Amendments page, if you want to edit the license you just created, use the row-action Edit. This is also where you can Duplicate the license if you want to create a new license that has a lot of the same Terms. And this is where you can create an amendment to a license, if that is needed.

And that is how you set up licenses in Alma!