Staff User's Guide

Version 2.0 (SFX 3)

The bridge to knowledge

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Part I

Introduction

Part I contains the following:

- **Section 1: Introducing Verde** on page **19**

1

Introducing Verde

This section includes:

- **The Verde KnowledgeBase – Central, Global and Local** on page **19**
- **Verde Modules** on page **20**
- **Additional Verde Features** on page **22**

Verde is an Electronic Resource Management system designed to facilitate a library's management of the information and workflows necessary to evaluate, acquire, and maintain e-resources in accordance with the library's business and license terms.

The Verde KnowledgeBase – Central, Global and Local

Ex Libris maintains a Central KnowledgeBase (CKB) that contains a broad range of the electronic resources available in the global e-market. The CKB includes e-interfaces, e-standalones, e-packages, and e-constituents, as well as their linked work records. It is continually updated to reflect changes in the global e-market.

Your Verde installation includes a Global KnowledgeBase (GKB) that is a copy of the CKB. The GKB facilitates collection management decisions by helping you locate resources and serves as the basis for the creation of the local Verde KnowledgeBase (LKB) for your Verde instance. Through regular updates from the CKB, known as **KB updates**, the GKB also provides you with information about new resources.

When Verde is first installed, the LKB is created from the GKB. As you begin working with the Verde system, the LKB is localized. Specific e-products are activated and attribute records (such as local acquisition, license, and access records) are linked to the activated e-products. New e-products and work records, known as locally created e-products and work records, may also be created in the LKB. Periodically, through the KB updates, changes in the CKB are transferred via the GKB to the LKB.

Verde Modules

Verde has five modules:

- Verde Tasks
- KB Manager
- KB Tools
- My Details
- Admin (displayed only for user with administrator permissions)

By default, the KB Manager module is displayed when you log in to Verde.

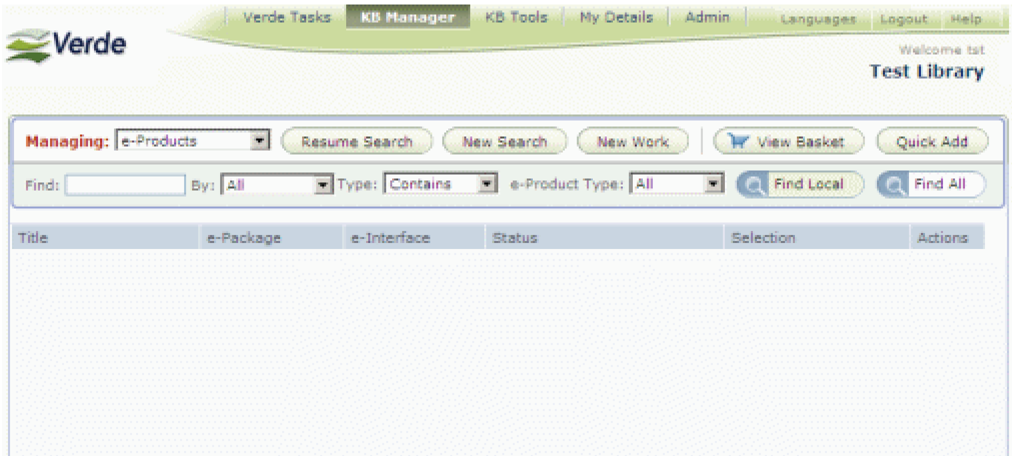

Figure 1: KB Manager

After logging in to Verde, you can do the following:

- Review basic information about your Verde installation, such as the operating system on which Verde is being run, the Verde server name, and the Verde version, service pack version, KnowledgeBase level, and Oracle version that is installed. All of this information appears in a pop-up window that opens when you click the Verde logo in the upper-left corner of the KB Manager module.

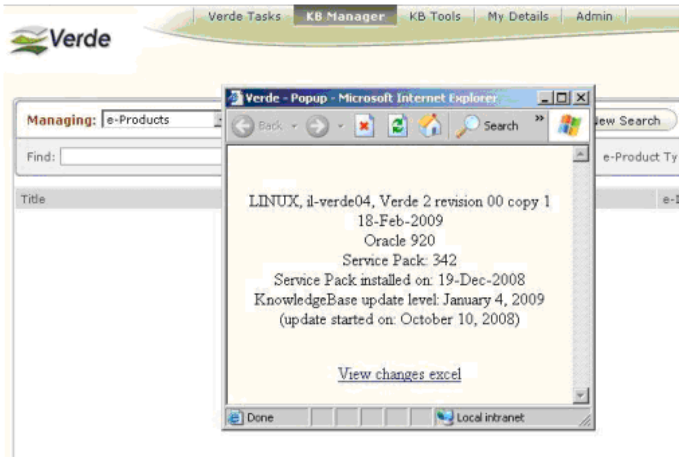

Figure 2: About Verde

- Review the Verde release notes by clicking the **View Changes Excel** link in the Verde information pop-up window.
- Change the language in which the Verde user interface is displayed by clicking **Languages** in the top right corner

Figure 3: Language Menu

- View your user name and the instance in which you are currently working (in the top right corner)
- Edit your personal information in the My Details module
- Navigate from module to module by clicking the module tabs in the menu bar

You can perform the following tasks in each module:

- **Verde Tasks** – View assigned and unassigned tasks that were generated by the Verde workflow engine. For information on the Verde Tasks module, see **Verde Tasks** on page **491**.

- **KB Manager** – Manage e-products and their attributes, libraries, and organizations. For information on the KB Manager module, see **Introducing the KB Manager Module** on page **27**.
- **KB Tools** – Schedule and run reports, tasks, and loaders, as well as view the output of reports, tasks, and data loads. For information on the KB Tools module, see **Introducing the KB Tools Module** on page **245**.
- **My Details** – Change your login name, password, e-mail, and other personal information. For information on the My Details module, see **My Details** on page **487**.
- **Admin** (only if you have administrative permissions) – Perform administrative functions such as managing Verde users and setting default values for relevant Verde entities. For information on the Admin module, see **Introducing the Admin Module** on page **497**.

Additional Verde Features

The following additional Verde features exist:

- Verde supports both single-instance environments as well multi-instance, or **shared consortium**, environments. In a shared consortium environment, one of the Verde instances serves as the central instance, while the other instances function as member instances. For information on working in a shared consortium environment, see **The Shared Consortium Environment** on page **563**.
- Verde can be used as a single point of maintenance for e-resource data that is shared by your library's suite of automation tools. For information on working with Verde in conjunction with SFX, Aleph, or Voyager, see **Introducing Verde Interoperability** on page **599**.
- Verde supports the searching and sorting of Chinese and Korean titles, including special search and sort functionality for the Taiwan zone. For information on searching and sorting Chinese and Korean titles, see **Support for Chinese, Japanese, and Korean** on page **635**.
- Verde handles 13-digit ISBNs as follows: When a 13-digit ISBN is inserted into the Verde database (either manually or using a loader) and a matching 10-digit ISBN exists, the 10-digit ISBN is saved and displayed. The 13-digit ISBN is also saved and indexed, so that the e-product may be found by searching for either the 10-digit or the 13-digit ISBN. To apply this handling of 13-digit ISBNs, the Verde database should be re-indexed using UTIL V/12. For information on this utility, see **Using UTIL V/12 to Re-index the Verde Database** on page **639**.

- When two users work simultaneously on the same record, the second user to submit changes receives the following error message:

Figure 4: Lock Functionality

If you click **reload**, the changes that were made by the first user are saved and the changes that were made by the second user are deleted. If you click **override**, the changes that were made by the first user are deleted and the changes that were made by the second user are saved. Note that this lock functionality applies to all e-product attributes (except usage and workflow), as well as libraries and organizations. However, it is not supported for work records.

- In addition to the fields that exist in each e-product or e-product attribute record, each Verde instance may define its own local fields to store additional information. The Verde administrator can create such fields for the e-product itself, as well as for the acquisition, license, access, admin, trial, cost, and usage e-product attribute records. Once the administrator has defined such fields, they are displayed in the Local Fields tab of the appropriate e-product or e-product attribute record. For information on creating local fields, see **Configuring Local Fields** on page **558**. For information on searching for existing local fields, see **Searching for e-Products** on page **32**.

Part II

KB Manager Module

Part II contains the following:

- **Section 2: Introducing the KB Manager Module** on page **27**
- **Section 3: Overview of e-Product Management** on page **29**
- **Section 4: Work Records** on page **43**
- **Section 5: e-Product Lists** on page **49**
- **Section 6: e-Product Attribute Records** on page **55**
- **Section 7: e-Product Records** on page **77**
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- **Section 9: Acquisition Records** on page **119**
- **Section 10: License Records** on page **139**
- **Section 11: Access Records** on page **155**
- **Section 12: Admin Records** on page **167**
- **Section 13: Trial Records** on page **181**
- **Section 14: Cost Records** on page **189**
- **Section 15: Usage Records** on page **193**
- **Section 16: Workflows** on page **199**
- **Section 17: Organization Management** on page **229**
- **Section 18: Library Management** on page **235**

2

Introducing the KB Manager Module

The KB Manager module supports the management of key Verde entities, such as the e-product and its attributes, as well as related libraries and organizations.

By default, when you enter the KB Manager module, the e-product management area is displayed. To view the library or organization management area, select **Libraries** or **Organizations**, respectively, from the **Managing** drop-down list.

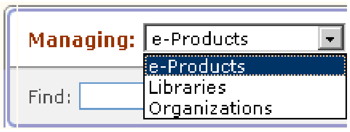

Figure 5: Managing Drop-Down List

For information about the e-product management area, see **Overview of e-Product Management** on page **29**.

For information about the organization management area, see **Organization Management** on page **229**.

For information about the library management area, see **Library Management** on page **235**.

3

Overview of e-Product Management

This section includes:

- **e-Product Types** on page **29**
- **Getting Started in the e-Product Management Area** on page **32**

An e-product is the main type of entity managed by Verde. This section describes the five types of e-products that exist within the Verde system and explains how to begin working in the e-product management area.

e-Product Types

The following types of e-products exist within the Verde system:

- e-interface
- e-package
- e-constituent
- e-standalone
- e-print

The above e-product types are described in this section.

e-Interface

The e-interface is the means by which electronic resources are accessed. *EBSCOhost* and *Highwire Press* are examples of e-interfaces. e-Interfaces are included as separate records in Verde because they may be acquired and licensed independently of the electronic resources that are accessed via the interface.

e-Package

An e-package is a grouping of one or more electronic e-products (known as **e-constituents** in Verde). Examples of e-packages include *JSTOR Arts and Sciences I*, *Elsevier ScienceDirect*, and *EBSCO Academic Search Premier*. There are two distinct types of e-packages:

- **Aggregator Packages**

  Aggregator packages are inclusive. When an aggregator package is selected in Verde, all its e-constituents are automatically included in the package by defaul and acquisitions and licensing can be performed only at the level of the package. However, you can define one or more e-constituents related to an aggregator package as independent. Independent e-constituents do not inherit e-product status, selection status, or activation dates from the parent package and are essentially like e-constituents that belong to selective packages.

  Examples of aggregator packages include: *EBSCO's Academic Search Premier* or *Academic Search Elite*, *ProQuest's ABI Inform* with full text, and *JSTOR Arts and Sciences I*.

- **Selective Packages**

  Selective packages contain multiple e-constituents from which a library can select. Examples of selective packages include: *Elsevier's ScienceDirect*, *Wiley's InterScience*, and *Oxford University Press via Highwire*.

  There are two types of selective packages: complete and partial. All selective packages created by KB updates are of the partial package type.

  Selective packages are treated by the KB update as follows:

  - e-Constituents of active selective complete packages are updated so that their e-product status, selection status, and expiration date match those of the e-package to which they belong. The activation date matches the date on which the KB update was applied.
  - e-Constituents of active selective partial packages are not activated.

  For more information about KB updates, refer to the document, *KnowledgeBase Update Process and Instructions*.

  The complete and partial types of selective packages should match the SFX auto-activate statuses. To set the selective package type according to the SFX auto-activate status, use the localization process. For details on this process, see **Localizing Records** on page 533.

NOTE:
A package can be linked to one e-interface only.

e-Constituent

An e-constituent is an electronic resource or e-product that is part of a package. The most common example of an e-constituent is a single electronic journal that is part of a package. For example, the journal *Brain Research* is an e-constituent in the *ScienceDirect* e-package. However, e-constituents can also be e-journals, e-books, or electronic products of other types that are sold by groupings (or packages).

An e-constituent can be linked to only one package. It cannot be linked to another e-constituent or directly to an e-interface. As a result, there must be a separate e-constituent record in every package in which an electronic journal is offered. For example, in addition to being an e-constituent in *EBSCOhost Electronic Journals Service*, the *Journal of Early Modern History* also has an e-constituent record in the e-packages *SwetsWise* and *Ingenta Select*.

e-Standalone

An e-standalone is an individual electronic resource that is linked directly to an e-interface. The most common examples of e-standalone resources are Abstract and Indexing databases. However, electronic journals that are not sold via a package or e-books sold separately can also be represented as e-standalone records. Examples of e-standalone resources are *Medline* and *D-Lib*. An e-standalone resource is linked to an e-interface and has no e-constituents.

e-Print

An e-print represents the print version of an electronic resource that is often relevant to the electronic version for acquisition and licensing purposes. An e-print record has different fields than true electronic e-products, but in other ways is similar to an e-product.

e-Print records can be created manually or imported using a batch program. They are used in Verde for information and reporting purposes only. e-Print records are not linked to any other e-products and are associated with work records only (for information on work records, see **About Work Records** on page **43**).

The following diagram illustrates the relationship between e-interface, e-standalone, e-package, and e-constituent e-products:

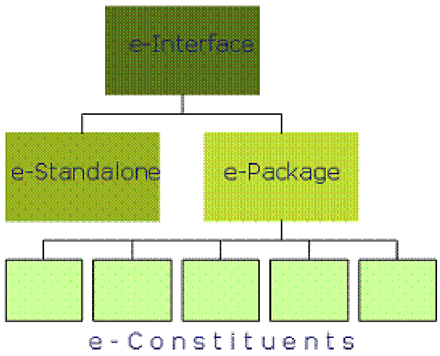

Figure 6: Relationships Between e-Products

e-Interface, e-standalone, e-package, and e-constituent e-products are supplied by Ex Libris as part of the Verde KnowledgeBase. Ex Libris recommends that a local e-product record be created only when a KnowledgeBase record does not exist for the particular e-resource. Existing e-product records contain references to records in other Ex Libris products and are updated regularly by Ex Libris via KnowledgeBase updates.

Getting Started in the e-Product Management Area

This section describes how to search for e-products in the e-product management area, how to view search results, and how to add e-products to your basket.

Searching for e-Products

To begin working with e-products within Verde, you must perform a search and retrieve a set of one or more e-products.

To search for e-products:

1 In the e-product management area of the KB Manager module, in the **Find** box, enter one or more search terms. Note that Verde supports the following Boolean operators: **AND, OR, NOT**. If one or more terms are entered without a Boolean operator, Verde performs a phrase search. For each term,

the * and ? regular expressions are supported. Note that at least two characters are required to precede a wildcard.

If the word **and**, **or**, or **not** is a part of a phrase—as, for example, in the title **Production and Operations Management**—you can search for the title in one of following ways:

- Put quotation marks around the word—for example, Production “and” Operations Management
- Put quotation marks around the string—for example, “Production and Operations Management”
- Put brackets around the word, for example, Production {and} Operations Management

Otherwise, it is interpreted as a Boolean operator and Verde searches for **Production** and **Operations Management**.

NOTES:

- If you enter a 13-digit ISBN number, Verde searches for either a matching 13-digit or 10-digit ISBN number. Similarly, if you enter a 10-digit ISBN number, Verde searches for either a matching 10-digit or 13-digit ISBN number.
- You can search ISBNs using the Identifier index, but not by selecting **All**.
- To search for reserved words, quotation marks should be used. For example, to receive search results for the string **About Campus**, use quotation marks around the string (**“About Campus”**) or around the reserved word (**“About” Campus**). For a list of reserved words, see **List of Reserved Words** on page **34**.

2 From the **By** drop-down list, select an index to search. Alternatively, you can select **All** to search an index that contains all fields in the work record (except ISSN, ISBN, eISBN, and eISSN for which you can search in the Identifier index) and the following fields from the e-product and its attribute records: **e-Product status**, **Selection status**, **e-Product type**, **e-Package type**, **Acquisition status**, and **License status**. For information about work records, see **About Work Records** on page **43**. For information about the functional fields in work records that are indexed and can be searched (including ISSN and ISBN), see **Work** on page **615**.

NOTE:
If you select **Local Fields** from the **By** drop-down list, Verde searches only for e-product, acquisition, license, and trial record local fields that are of the type **Value** and that meet the other criteria described below.

3 From the **Type** drop-down list, select one of the following search types:

- **Contains** – A keyword search for one or more search terms that appear anywhere in a record.
- **Exact Match** – A search that treats the search term as a phrase and looks for an exact match for the term being searched.
- **Starts With** – A search for records in which the search term appears at the beginning of the field. It is most useful for searching for a record title.

4 From the **e-Product Type** drop-down list, select the default, **All**, to search within all the e-product types, or select one of the five e-product types to search within the selected e-product type only.

5 If you are working in a single-instance environment, click one of the following options to define the scope of your search.

- **Find Local** – These searches are performed in the local KnowledgeBase and retrieve matching records that have been created locally, or records from the Global KnowledgeBase that have been localized (by adding a local selection status and/or an e-product status, or by adding an attribute record).
- **Find All** – These searches are performed in the entire KnowledgeBase and retrieve matching records regardless of their local status.

6 If you are working in a multi-instance, non-shared environment, right-click the **Find** button and in the pop-up window, choose the instances that you want to search. Select **Search KB** to include e-products from the KnowledgeBase that are not active or local in your search. Click **Find** to activate the search.

If you are working in a multi-instance, shared environment, see **Search, Display,and Navigation in a Shared Consortium Environment** on page 581 for information on the available search and display options.

List of Reserved Words

Table 1. List of Reserved Words

Reserved Word	Reserved Character	Operator
ABOUT	(none)	ABOUT
ACCUM	,	Accumulate
BT	(none)	Broader Term
BTG	(none)	Broader Term Generic
BTI	(none)	Broader Term Instance
BTP	(none)	Broader Term Partitive

Table 1. List of Reserved Words

Reserved Word	Reserved Character	Operator
FUZZY	?	Fuzzy
(none)	{ }	escape characters (multiple)
(none)	\	escape character (single)
(none)	( )	grouping characters
(none)	[ ]	grouping characters
HASPATH	(none)	HASPATH
INPATH	(none)	INPATH
MINUS	-	MINUS
NEAR	;	NEAR
NT	(none)	Narrower Term
NTG	(none)	Narrower Term Generic
NTI	(none)	Narrower Term Instance
NTP	(none)	Narrower Term Partitive
PT	(none)	Preferred Term
RT	(none)	Related Term,
(none)	$	Stem
(none)	!	Soundex
SQE	(none)	Stored Query Expression
SYN	(none)	Synonym
(none)	>	Threshold
TR	(none)	Translation Term
TRSYN	(none)	Translation Term Synonym
TT	(none)	Top Term
(none)	*	Weight
(none)	%	wildcard characters (multiple)
(none)	_	wildcard character (single)
WITHIN	(none)	WITHIN

Viewing Search Results

The e-products and work records (for information on work records, see **About Work Records** on page 43) that meet the criteria of your search are displayed in the e-product management area.

Above the table, a summary line is displayed, indicating the search term, the total number of e-product/work records retrieved by the search, and, if you are working in a multi-instance non-shared environment, the instances that were searched.

Search results for (biotechnology): Found 239 e-Products.

Figure 7: Search Results – Single-Instance Environment

Search results for (history): at Members (INST1 TST) Found 1,334 e-Products.

Figure 8: Search Results – Multi-Instance, Non-Shared Environment

The columns displayed in the table differ depending on whether you are working in a single-instance environment or a multi-instance, non-shared environment.

The following table describes the columns displayed.

Table 2. Table Columns

Name	Description
Title	The work/e-product record title found as a result of the search. Note that the search argument may not be visible. It may be in a record field that is not displayed.
e-Product Type	Displays the relevant e-product type icon.
e-Package	If the search result is an e-constituent, this column displays the package name that contains this e-constituent.
Holdings (multi-instance environments only)	Displays the searched instances in which the e-product is local. It includes the selection status and the e-product status for each searched instance in which the e-product is active.
e-Interface	If the search result is an e-constituent, e-package, or e-standalone, this column displays the e-interface to which the e-product belongs.
Status (single-instance environments only)	The e-product's status field from the e-product. This field provides information about the implementation status of the e-product.

Table 2. Table Columns

Name	Description
Selection Status (single-instance environments only)	The e-product's selection status field, which describes the stage of the e-product in the selection process.
Actions	Contains one of the following buttons: ■  The **Add to basket** button enables you to add an e-product to your basket. This button is always displayed. ■  The **Link to resource** button opens an SFX window which takes you to the home page of the journal as it is stored by SFX. This button is displayed only if the resource is active. ■  The **New** button is displayed for each work record. It is always possible to add a new e-product to an existing work record.

The following table describes the icon buttons and hypertext links used within the search results display.

Table 3. Icon Buttons/Hypertext Links

Icon Buttons/Hypertext Link	Description
	Displays the full work record
	Indicates that the e-product is an e-constituent. Displays the full e-product.
	Indicates that the e-product is a selective e-package. Displays the full e-product.
	Indicates that the e-product is an aggregator e-package. Displays the full e-product.
<Package name>	Displays the full e-product package
	Indicates that the e-product is an e-interface. Displays the full e-product.
<Interface name>	Displays the full e-product interface

Table 3. Icon Buttons/Hypertext Links

Icon Buttons/Hypertext Link	Description
	Indicates that the e-product is an e-standalone. Displays the full e-product.
	Indicates that the e-product is an e-print. Displays the full e-product.
	Displays a list of the e-constituents that belong to the selective e-package. For details on this list, see **e-Package List** on page **51**.
	Displays a list of the e-constituents that belong to the aggregator e-package. For details on this list, see **e-Package List** on page **51**.
	Display a list of e-packages and/or e-standalones that belong to the e-interface. For details on this list, see **e-Interface List** on page **49**.
	Indicates that the e-product is active in the local KnowledgeBase

Search results are sorted alphabetically by the title of the work record. If a work record has more than one linked e-product record, these records are sub-sorted alphabetically by e-package and e-interface name.

If the e-products associated with a single work record do not fit on the screen, **next…** appears in the last line of the search result table.

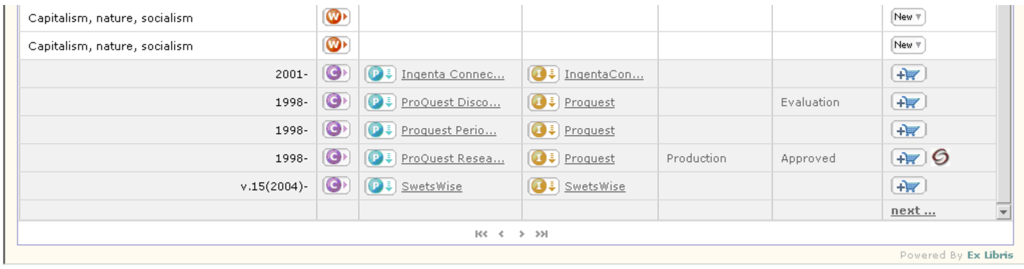

Figure 9: Search Results – Browse to Next Page

Use the single and double arrows that appear at the bottom of the screen to navigate through the search results. The single backward and forward arrows navigate backward and forward by a single screen, while the double arrows navigate to the beginning or end of the results list.

The following buttons appear above the search boxes:

Figure 10: Search Results Buttons

- **Resume Search** – clear current search results and navigation crumbs. The search parameters selected in the previous search (search By, search Type and search e-Product type) remain.
- **New Search –** Clears the current search results and search parameters (search By, search Type, and search e-Product type) .
- **New Work –** Opens a new work record. For details on defining new work records, see **Adding New Work Records** on page **44**.
- **View Basket** – Displays the e-products that are in your basket. For details, see **Actions Available from the Basket** on page **40**.
- **Quick Add –** Opens a wizard that enables you to add a new e-package or e-standalone. For details on this wizard, see **The Quick Add Wizard** on page **85**.

Working with Navigation Crumbs

When you perform a new search, a navigation crumb is created for the search. As you select work and e-product records, navigation crumbs are created for each record that you view. The navigation crumbs are displayed at the top of each screen that you view within the KB Manager module. You use these crumbs to navigate back to previous screens.

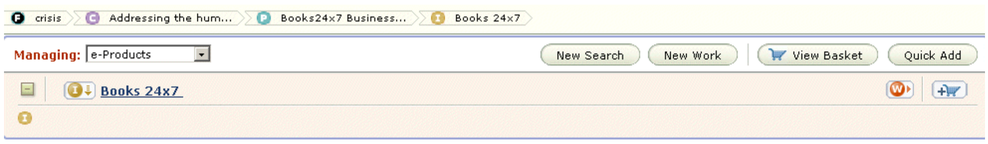

Figure 11: Search Results – Navigate to Previous Screen

The most recent search can be retrieved by selecting the navigation crumb that contains the Find icon . This search crumb is displayed as soon as a search is performed and continues to be displayed until a new search is performed.

Up to five additional crumbs are created—one for each of the five e-product or work records that are accessed. When a sixth e-product or work record is accessed, a new crumb is created and overwrites the first non-search crumb.

NOTE:

Navigation crumbs are created for work records only when the these records are accessed from the search result table. If you select an e-product and then view the work record of this e-product, a navigation crumb is created for the e-product record itself, but not for its work record.

e-Product navigation crumbs display icons that correspond to the e-product types:

- **C** for e-constituent
- **S** for e-standalone
- **P** for e-package
- **I** for e-interface
- **Pr** for e-print
- **W** for work

When you select a navigation crumb, the e-product or work record opens to the screen that was last viewed. For example, if the screen that was last viewed is a license list, the e-product opens to the license list; if the screen that was last viewed is an acquisition list, the e-product opens to the acquisition list.

Actions Available from the Basket

When you view the search result table, you can add records to your basket by clicking the **Add to basket** button. After you have added the record to your basket, the **Added to basket** button is displayed.

To view the items that you placed in your basket during the current session, click the **View Basket** button. The Basket Content window is displayed.

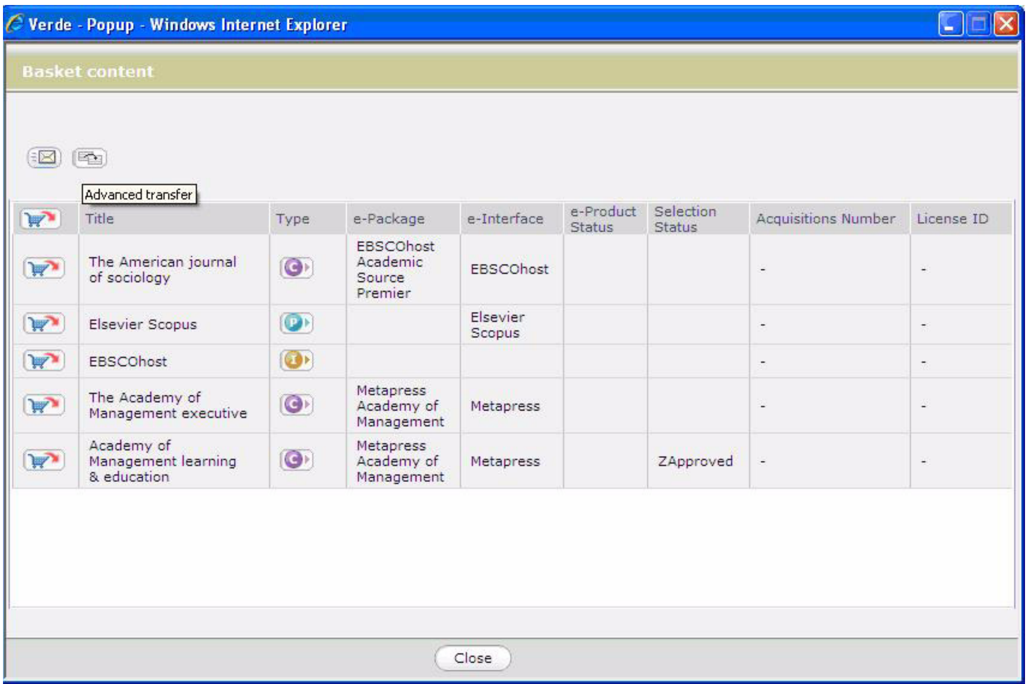

Figure 12: Basket Content

You can do the following in this window:

- Remove a record from the basket by clicking the **Remove from Basket** button to the left of the record.
- Remove all the records from the basket by clicking the **Remove all items from the basket** button in the column heading.
- Send an e-mail related to all the items in your basket by clicking theS**end e-mail** button at the top of the window.
- Transfer local data from one e-product to another by means of the Advanced Transfer wizard by clicking the **Advanced transfer** button at the top of the window. For details, see **Advanced Transfer Wizard** on page **95**.

4

Work Records

This section includes:

- **About Work Records** on page **43**
- **Adding New Work Records** on page **44**
- **Editing a Work Record** on page **46**
- **Deleting Work Records** on page **47**

About Work Records

A work record contains a brief bibliographic description of an e-product. Each e-product must have a corresponding work expression record, which contains standard bibliographic fields, such as title, imprint, ISSN, ISBN, and other key fields. In addition to these standard fields, it is possible to define up to ten local fields.

A single work record can, and often is, linked to multiple e-resources—for example, an e-journal that is offered through multiple providers. In this case, there is a single work record for the journal and multiple e-constituent records—one for each provider that offers this title. For example, the journal *Nature* is provided by both *EBSCOhost Academic Search Elite* and *Journals@Ovid*.

Work records are stored internally in MARC 21 XML format.

The Verde KnowledgeBase consists of predefined work records. It is recommended that you use these work records whenever possible and that you do not create your own work records unless they do not exist in the KnowledgeBase.

The advantages of KnowledgeBase work records over locally created records are twofold:

- The KnowledgeBase work records contain links to other Ex Libris products.
- The KnowledgeBase work records are maintained and regularly updated by Ex Libris as part of the KnowledgeBase update process.

Work records in the KnowledgeBase typically contain the following fields:

- Main title
- Abbreviated titles
- ISSN/eISSN or ISBN/eISBN
- Publisher
- Format
- Frequency
- Subject
- Continues/continued by
- SFX ID - This is the SFX Object ID

Adding New Work Records

You add new work records using both the new work and edit work screens. You can then associate an e-product type with the work record.

To add a new work record:

1 In the e-product management area of the KB Manager module, click the **New Work** button. A form screen with mandatory and optional fields for the work record opens.

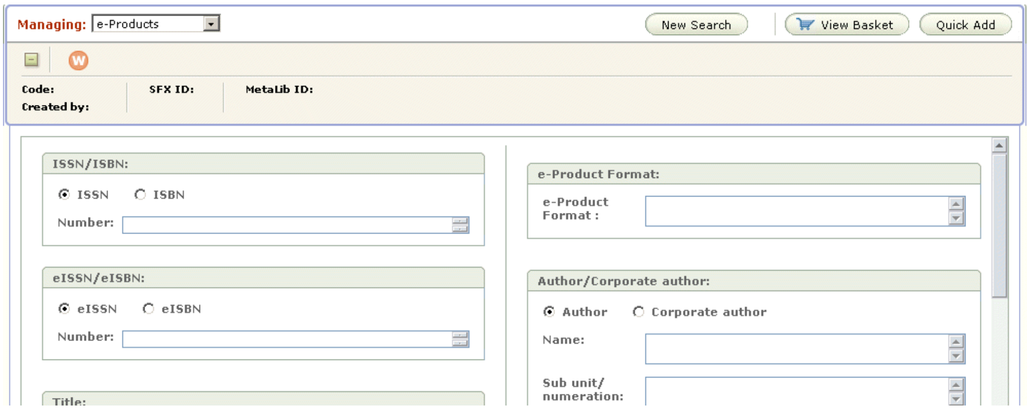

Figure 13: New Work – Form Screen

NOTE:
This screen does not contain the full list of available fields. The full list of available fields can be viewed from the edit work screen only. This screen can be accessed only after you submit the work record.

2 Complete the provided fields. Note that the **Title** and **e-Product Type** fields are mandatory.

3 Click **Submit**. The new work record is saved and the edit work screen of the record opens, displaying the record title, the instance code, the associated SFX and MetaLib IDs, the user name of the user who created the work record, and the creation date of the record.

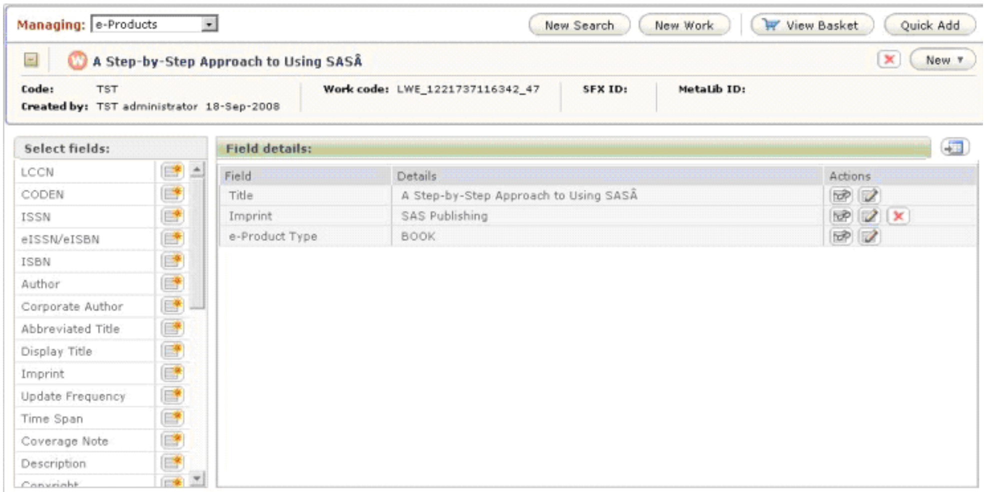

Figure 14: Edit Work Record

NOTE:

The title bar can be collapsed and expanded using the **Collapse/Expand** buttons.

4 From the **Select Fields** list, select the fields that you want to add to the work record. The fields are added to the **Field Details** table on the right. Note that if a field does not appear in the Select Fields list, it is either already included in the work record or it is not available for use in the current record.

5 Click the **New** button in the top-right corner to select an e-product type that you want to associate with the new work record. For information on e-product types, see **e-Product Types** on page **29**.

NOTES:

- If the main title is in Chinese or Korean, you must define the language in the **CJK Language** field.
- If a 13-digit ISBN number is entered, the system checks whether this ISBN number has a matching 10-digit ISBN number. If there is a matching 10-digit ISBN number, the system checks whether this 10-digit ISBN number exists in the Verde database. If it does, the new work record is rejected. If it does not, a new work record is created and its matching 10-digit ISBN number is displayed. If in its intial check, the system

discovers that the 13-digit ISBN number has no matching 10-digit ISBN number, the 13-digit ISBN number is saved and displayed, provided no such ISBN number exists in the Verde database.

Editing a Work Record

You can edit existing work records by adding new local fields, or by updating or deleting existing local fields.

NOTE:
Records that have been derived from the KnowledgeBase are protected. Only local fields can be modified or added.

- To add a field, click the field's **Add** button.
- To edit an existing field, click the field's **Edit** button.
- To view an existing field, click the field's **View** button. Note that the field cannot be updated in view mode.
- To delete a field, click the field's **Delete** button. Note that only locally created fields and non-mandatory fields can be deleted.
- To set the non-filing indicator for the **Title** field, click the **Edit** button. The non-filing indicator is used to define the number of characters to be suppressed for filing. For example, to suppress the word **the**, you would enter **4** (that is, three spaces for the word **the** and one space for after the word). The suppressed characters are highlighted in yellow in the Title field's Details column, as shown below. .

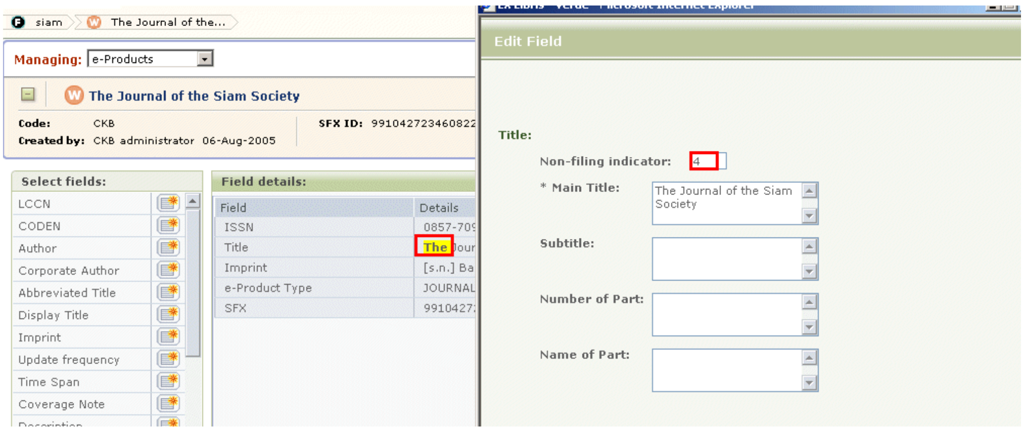

Figure 15: Edit Title Field

- To re-index the work record, click the **Index** button.

Deleting Work Records

You can delete work records that were created locally as long as the work records do not have associated e-products. If they do have associated e-products, first delete the associated e-product and then delete the work record. Work records that are part of the KnowledgeBase cannot be deleted. In consortia installations, locally created work records are automatically propagated to other instances.

5

e-Product Lists

This section includes:

- **Overview** on page **49**
- **e-Interface List** on page **49**
- **e-Package List** on page **51**

Overview

There are two types of e-product lists:

- e-Interface
- e-Package, which contains the following types of lists:
  - Selective
  - Aggregator

NOTE:

The e-interface and e-package lists can be modified in multi-instance, shared consortium environment. For details, see **Viewing Merged Data in the e-Package and e-Interface Lists** on page **595**.

e-Interface List

The e-interface list displays the e-packages and/or e-standalone records offered through the interface. The e-products are sorted alphabetically by title. The e-product status and selection status of each e-package or e-standalone is displayed in the list.

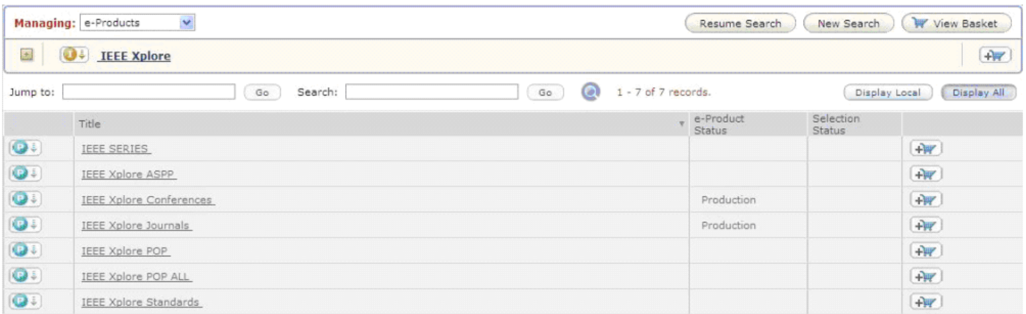

Figure 16: e-Interface List

The following options are available from this screen:

- Jump to another alphabetical point in the list.
- Search for an e-package title
- Display the local or display all the e-products linked to the e-interface
- Access an e-package list by clicking the icon in the relevant line in the first column.
- Access the e-product and its attribute records by clicking the underlined title in the second column.
- Add an e-product or the interface itself to your basket.

e-Package List

When you click one of the e-package buttons, a screen opens, displaying an alphabetical list of the titles that are linked to the e-package.

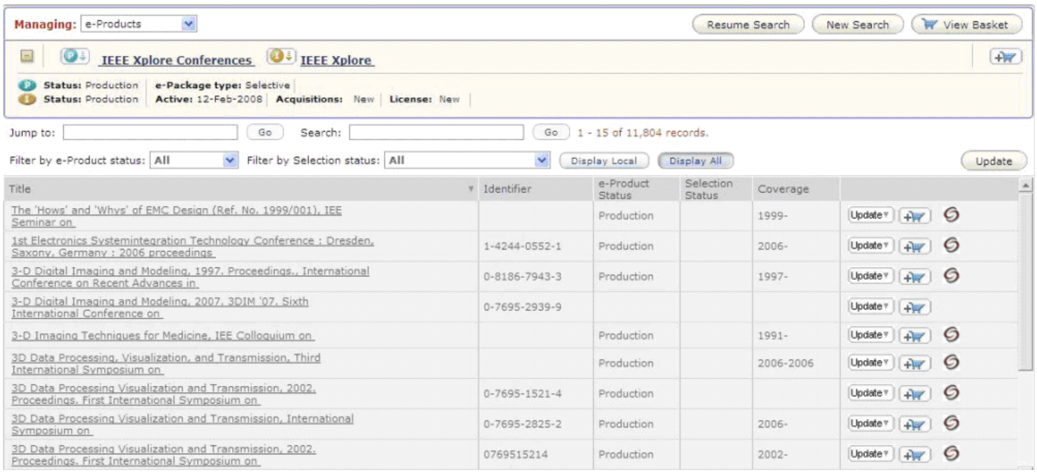

Figure 17: e-Package List

The summary box at the top of this screen displays the following information:

- the name of the e-package and e-interface
- the status of the e-package and e-interface
- the selection status of the e-package and e-interface
- the e-package type
- the active date for the e-package and e-interface
- the status of the acquisition and licensing records of the e-package and e-interface

The area below the summary box enables you to:

- Jump to another alphabetical point in the list
- Search for an e-constituent title
- Filter the list by an e-product status. The following options are available: All, [empty], Production, Withdrawn, Implementation 1,2, and 3, Trial.
- Filter the list by a selection status. The following filter options are available: All, Approved, Evaluation, Final Approval, Rejected, Review, Withdrawn by Publisher. Note that the **All** filter does not include the **Withdrawn by Publisher** status.
- Display all or only the local titles linked to the e-package. The **Display Local** button is available only if there are local records.

- Perform a global update (available only in selective e-package lists) – When you click the **Update** button to the right of the filter selection boxes, the Activation pop-up window opens, enabling you to update the following four fields:
  - e-Product status
  - Selection status
  - Activation from date
  - Activation to date

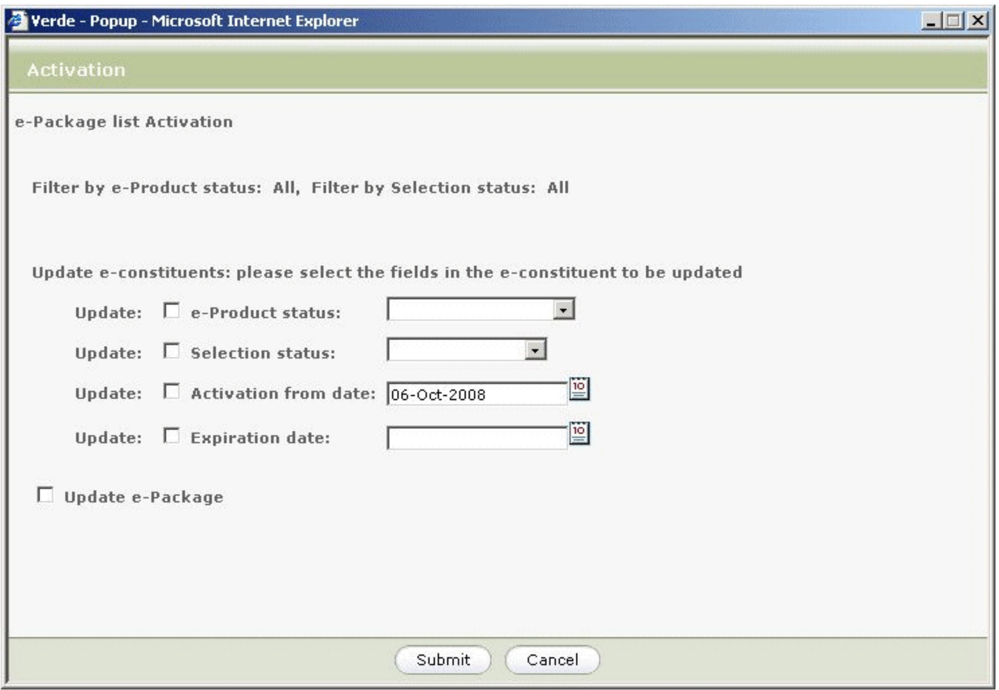

Figure 18: Activation Pop-Up Window

NOTE:
If you filter the e-package list, the update is performed only for e-constituents that match the filter criteria (which are e-product status, selection status, and display local/all).

If you set the e-Product status, the **Activation from date** field becomes mandatory. Even though the **Activation from date** field is automatically populated with the current date, you must select the check box to the left of the field to apply this date.

The main section of this screen displays the following data about e-constituents linked to the e-package:

- Title – You access the e-product and its attribute records by clicking the title.

- Identifier (ISSN/eISSN or ISBN/eISBN)

NOTE:
The e-package list can be sorted alphabetically by title or by identifier. The blue arrow in the Title or Identifier header indicates the current sort option.

- e-Product status
- Selection status
- Coverage – The coverage data that is displayed in the e-package list is taken from the local holdings, if available, and if not, from the global coverage.
- Actions
  - Add to basket
  - Link to resource via SFX
  - Make dependent/independent (available only in aggregator e-package lists) – You can make an e-constituent independent of its aggregator package by clicking the e-constituent's **Make Independent** button. Independent e-constituents are essentially like e-constituents that belong to selective packages. For details about this option, see **General Information** on page 77.
  - Update (available only in selective e-package lists) – When you click an individual e-constituent's **Update** button (in the column on the right), a drop-down list appears, displaying the options relevant to the e-constituent's selection status.

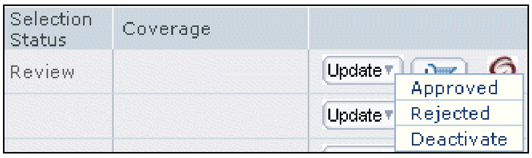

Figure 19: e-Constituent Update

In the above example, the e-constituent has a selection status of **Review**, so the only update options are **Approved**, **Rejected**, and **Deactivate**.

If the **Activate** option is available and you select this option, the Activation pop-up window opens, prompting you to enter the data required to activate the e-constituent. The values entered in these fields are used to update the e-constituent in the e-package list.

Note that there is a section in which you can enter the local holdings. In addition, the global coverage for the e-constituent is displayed.

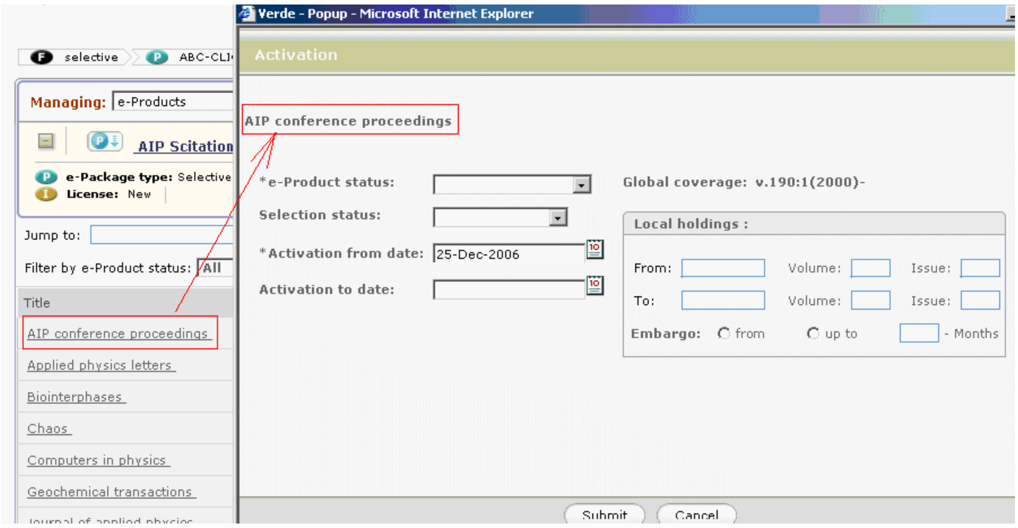

Figure 20: Activation Window

If the **Deactivate** option is available and you select this option, the Deactivation pop-up window opens, prompting you to enter the data required to deactivate the e-constituent. The values entered in these fields are used to update the e-constituent in the e-package list.

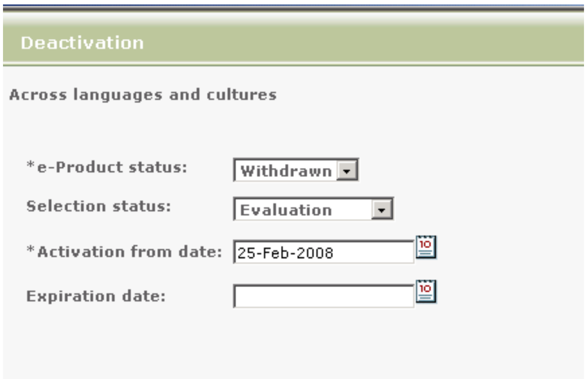

Figure 21: Deactivation Window

6

e-Product Attribute Records

This section includes:

- **About e-Product Attribute Records** on page **55**
- **e-Product Summary Tab** on page **59**
- **Inheritance of e-Product Attribute Records** on page **63**
- **Copying and Pasting e-Product Data** on page **65**
- **Save Default** on page **67**
- **E-Mailing Records** on page **70**

About e-Product Attribute Records

You can link several attribute records to an e-product, enabling you to manage the e-product. In principle, all attribute records can be linked to all e-product types. However, note the following:

- e-Print records can have only acquisition and cost records.
- e-Interface, e-package, e-standalone, and e-constituent records can have acquisition, license, access, admin, cost, usage, and workflow records.
- Only e-interface, e-package and e-standalone records can have trial records.

NOTE:
All attribute record options are visible in the left menu, even if some of the attribute record options are not relevant for the selected e-product type.

The following attribute records are available:

- Acquisitions, local acquisitions, and invoice records
- License and prevailing terms records
- Access records
- Administrative records, local admin statistics, incidents, breaches

- Trial records
- Cost records
- Usage records
- Workflows

The e-product with its linked work record and attribute records is called the e-product unit.

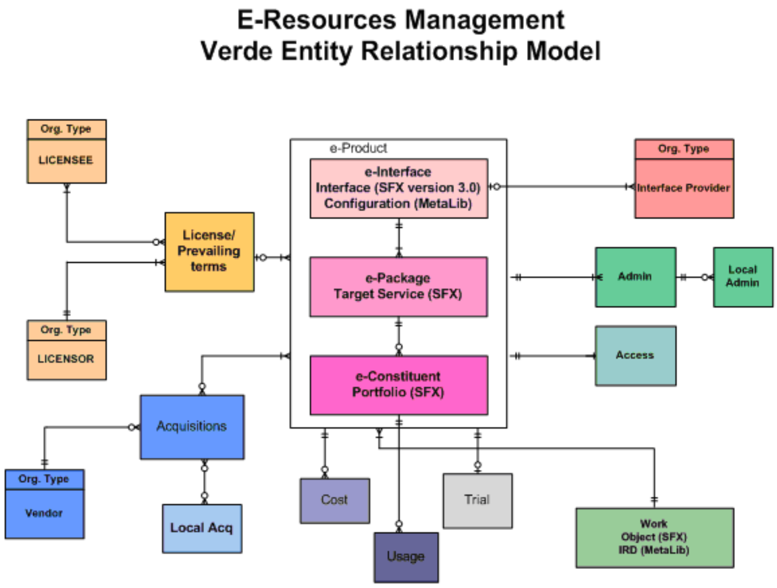

Figure 22: The e-Product Unit

To display a full e-product record and its related attribute records, click the e-product button from the search results screen, or the e-product name from any other screen.

The e-product screen that is displayed is divided into several areas. On the left is a menu bar enabling you to access the e-product and e-product attribute records. In the upper area of the screen, there is a brief summary of the e-product and its parent records. The right pane contains the work area. You can configure Verde to display either the e-product details pane or the summary pane by default. For more information about this configuration option, contact your Implementation or Support representative.

Left Menu

The left menu enables you to navigate between attribute records. If an attribute record exists at any level (e-interface, e-package, or e-constituent) for the e-product displayed, a vertical green bar is displayed to the left of the attribute record name in the left menu. In the example below, the e-product has three attribute records—Acquisition, License, and Access.

Figure 23: e-Product Left Menu

Work Area

The work area may contain:

- A summary screen of the e-product.
- One of the related e-product attribute records. This may be a detailed form screen or a list of records.

For example, the illustration below displays the Acquisition Record List in the work area.

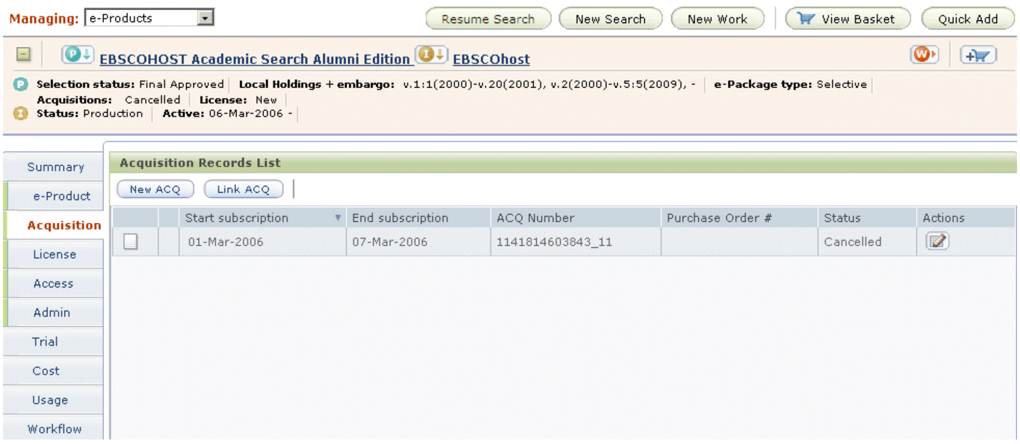

Figure 24: Work Area

e-Product Summary

The brief summary area at the top of the screen contains summary information about the e-product and can remain visible as you navigate through the e-product attribute records. The top line displays the first 25 characters of the e-product title and the first 25 characters of the e-package and/or e-interface title. Icon buttons are used in the summary to indicate the e-product type and can be used for navigation.

For example, in an e-constituent brief summary, you see information from the e-constituent, its package, and its interface. Each record is displayed on its own line.

Figure 25: e-Constituent Brief Summary

In an e-standalone brief summary, you see information from the e-standalone and its interface.

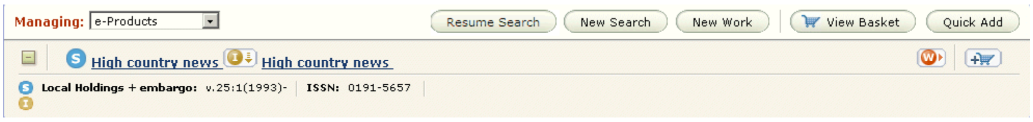

Figure 26: e-Standalone Brief Summary

e-Package brief summaries include details about the package and its interface.

e-Interface and e-print records contain details of the single record.

The following fields are displayed in the brief summary of an e-product record. They are displayed only if they are populated:

- e-Product status
- Selection status
- Active from date
- Active to date
- Holdings (either local or global)
- ISSN
- Format
- Availability
- Package type
- Acquisition status
- License status

- Interface provider

The brief summary area offers the following functions:

- Edit work record – Click the **Open Work** button to view/edit the e-product's work record.
- Add to basket.

e-Product Summary Tab

The e-product **Summary** tab is available for all e-product types. This tab is a useful display for non-expert users. It collects information from all of the relevant e-product and e-product attribute records.

The information is divided into the following sections: e-product and work information, e-product information, libraries, acquisitions, admin, trial, and workflow. Each section summarizes relevant values (for example, the Trial section includes trial parameters, status, start and end dates, and so forth).

The Summary tab includes several types of data—text, icons, and links. The text is displayed regardless of your user permissions. However, you can link to the attribute records only if you have the appropriate privileges. For example, you can link to the license record only if you have privileges to view licenses.

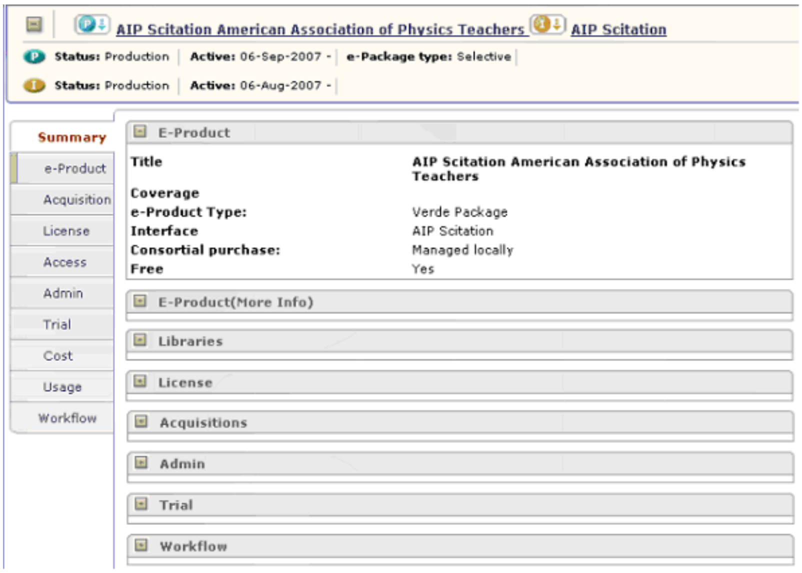

Figure 27: Summary Tab

The Summary tab includes the following fields:

Table 4. Summary Tab

Section	Fields	Comments
e-Product	Title	Title of e-product. For e-constituent summary contains also titles of related e-package and of e-interface.
	Coverage	If local coverage exists, it is displayed. If not, global coverage is shown.
	e-Product type	e-Product type value of work record.
	Interface	Name of interface name to which e-product belongs.
	Consortial purchase	Relevant only for shared multi-instance environments. There are three possible values: managed for all, managed for some (for central instance), and managed locally (for local instance).
	Free	Free or subscription.
	Other work data	The following fields will be included in the summary if they exist: issn/isbn, time span, coverage note, update frequency.

Table 4. Summary Tab

Section	Fields	Comments
e-Product (More Information)	Availability	Availability start and end date if availability is down.
	e-Product status	
	Selection status	
	View Admin Setting	
	Sponsoring library	
	Library Contact	
	Public Note	
	Interface Provider	Relevant only for e-interface. Organization responsible for the interface.
	View Access Setting	Link to access list. Link is available for users with view access permissions.
	Link to resource	Verde provides access to an SFX menu displaying the electronic full-text service for e-constituents or e-standalones. It is available for active e-products only.
	Open URL activated	**Open URL activation status** value in e-product admin record.
Libraries	Active for	List of libraries that have access to the e-product.

Table 4. Summary Tab

Section	Fields	Comments
License	View license settings	Link to license. Link is available for users with view license permissions.
	Licensor	
	Licensee	
	Start and end dates	License start and end dates
	License status	
	Renewal date	
	Renewal type	
	Link to attachment	Link to license attachment. Link is available for users with view license permissions.
	Public note	License public note
	General terms note	License general terms note
	User restriction note	License user restriction note
	Use restriction note	License use restriction note
	ILL print of fax	
	Perpetual rights	
Acquisitions	Acquisition status	
	Purchase order number	
	Vendor	
	Print cancellation restriction	
	Latest invoice status	
Admin	Hardware requirements public	
	Software requirements public	
	View admin settings	Link to admin record. Link is available for users with view admin permission.

Table 4. Summary Tab

Section	Fields	Comments
Trial	Start date	
	End date	
	Status	
	Decision date	
	Purchase decision	
Workflow	Title	Title of active workflow. The title is linkable and opens the task list of the workflow.

The Summary tab in a shared environment displays merged data from central and local instances. For more information see the **e-Product Summary Tab** on page **594**.

NOTE:

The Summary tab is configurable. For more information, see **Configuring the e-Product Summary** on page **556**.

Inheritance of e-Product Attribute Records

Active e-products inherit attribute records from a higher-level e-product. An e-constituent inherits attribute records from the e-package to which it belongs, and an e-package or e-standalone inherits attribute records from the e-interface to which it is linked.

The down arrow indicates that the attribute record is part of the e-product's parent record. If the e-product is active, the parent's attribute records are inherited. If the e-product is not active, the attribute records are not inherited and are displayed for informational purposes only.

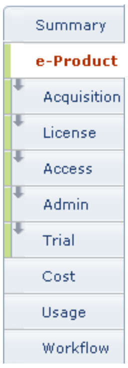

Figure 28: Inheritance of e-Product Attribute Records

NOTE:
It is possible to configure Verde so that parent attributes are not displayed for inactive e-constituents. To enable this feature, contact your Implementation or Support representative.

The following e-product attribute records can be inherited:

- Admin records
- Access records
- Trial records
- Acquisition records
- Local acquisition record (via the acquisition record)
- License records and prevailing terms

Cost and usage records are not inherited.

If an attribute record is inherited, it is inherited in its entirety. There is no partial inheritance.

Attribute records are inherited only when the e-product does not have an attribute record of its own.

For example:

- An e-constituent can have its own acquisition record. If it does, it is not subject to the related e-package's acquisition record.
- If the e-constituent does not have an acquisition record, it inherits the acquisition record from the e-package.

e-Packages, e-standalones, and e-constituents cannot inherit acquisition records from an e-interface.

License and prevailing terms have a special rule. Unlike other attribute records, licenses and prevailing terms are always inherited. The child always inherits the parent's license and prevailing terms, unless the child has a license of its own. If the child has a license of its own, only the license is inherited and the child needs to create a prevailing terms record to reconcile the two licenses (the explicit and the inherited). In other words, licenses and prevailing terms are cumulative. For more information on prevailing terms, see **Prevailing Term Records** on page **152**.

Copying and Pasting e-Product Data

Attribute record details from one e-product can be copied to another e-product.

NOTE:
This function is relevant for license, access, and admin records only.

Copying Attribute Record Details

On the details screen of the record that you want to copy, click the **Copy** button.

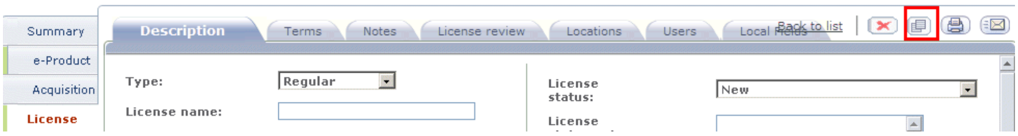

Figure 29: Copying Attribute Details

After you have clicked the **Copy** button, the **View Clipboard** button is displayed on the top line of the e-product screen.

Figure 30: View Clipboard Button

Click the **View Clipboard** button if you want to view the contents of the clipboard.

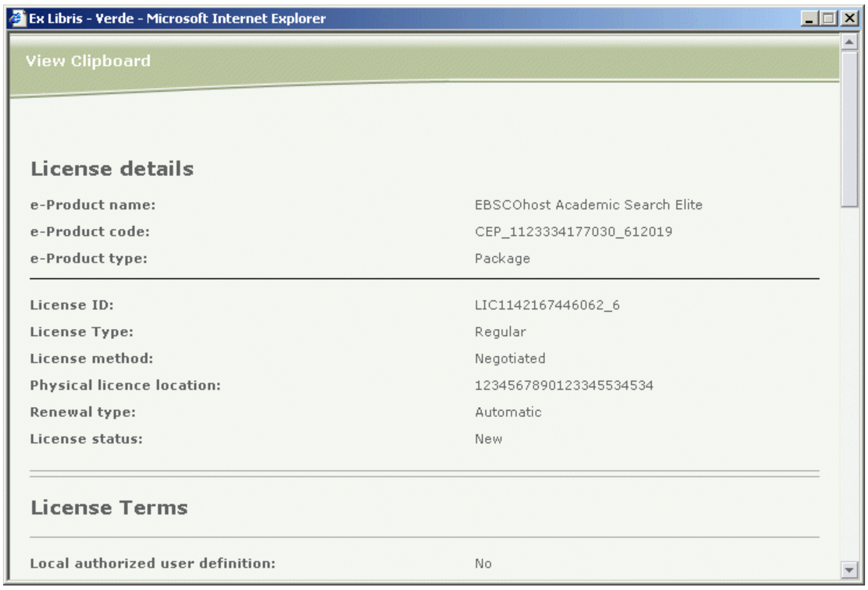

Figure 31: View Clipboard

Pasting Attribute Record Details

Locate the e-product record in which you want to paste the details that you copied to the clipboard and click the relevant tab in the left menu.

The **Paste** button is displayed at the top of the list if the paste function is available.

Figure 32: Pasting Attribute Details

NOTES:

- The paste function is available only if the attribute record can be added.
- The paste function is always available for license records, but is available for access and admin records only if there are no access or admin records for the e-product and you have create/edit permissions for access/admin.

Paste functionality is available in multi-instance environments as well as in a single-instance environment. For information about the copy/paste functionality in multi-instance environments, see **Copy/Paste Attribute Profiles** on page 578.

Save Default

The Save Default functionality allows individual users to create and save default settings during the creation or updating of specific records. If you enter information in one of the records and set this information as the default, the system automatically populates the record's fields with this information the next time you create a new record for this e-product attribute.

The Save Default feature is available for the following attribute records:

- Acquisitions
- License – There are two levels of default for license: default per instance (under Admin/Default Values) and default per user.
- Access (for every four access types)
- Admin

Note the following restrictions of the Save Default feature:

- Only new attribute records created through the Verde interface accept default values.
- Fields with values that are generated by the system cannot be saved with default values (such as **Creation date**, **Created by**, and **Attribute code**)
- Fields with values that are supposed to be unique cannot be saved with default values (such as **Purchase order number** or **License name**)

To configure the Save Default feature:

1 Open an attribute record. If there is no default defined for this attribute record, the **Save Default** button is displayed.

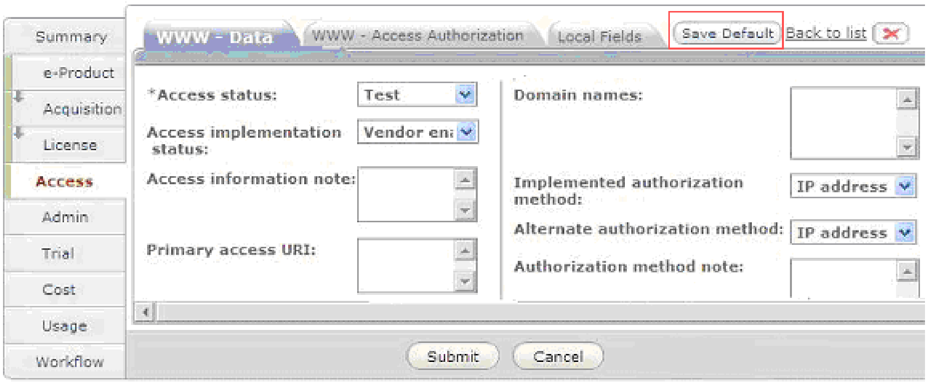

Figure 33: Save Default

2 Enter the values that you want to be saved as the default and click **Save Default**. The following message is displayed: **The default values were**

successfully saved. The **Replace Default** button is displayed instead of the **Save Default** button.

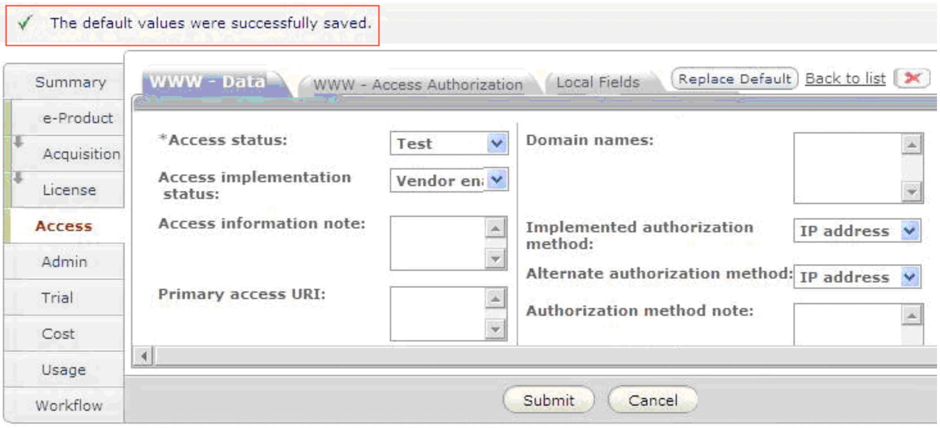

Figure 34: Default Values Saved

Most fields are available for Save Default. If there are fields that are unique or generated by the system and cannot be saved as default, the system displays a message that the default values were saved excluding fields that are not supported for Save Default.

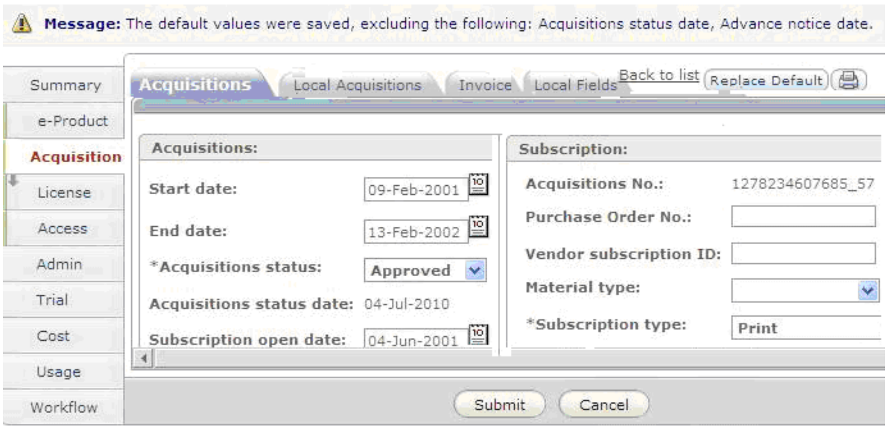

Figure 35: Default Values Saved Excluding Fields

Each new attribute record of this type now contains the default values. To change the default values, enter new values and click **Replace Default**. To remove the default values for a specific user, click **Remove Default** in the attribute records list.

For example, for acquisition records:

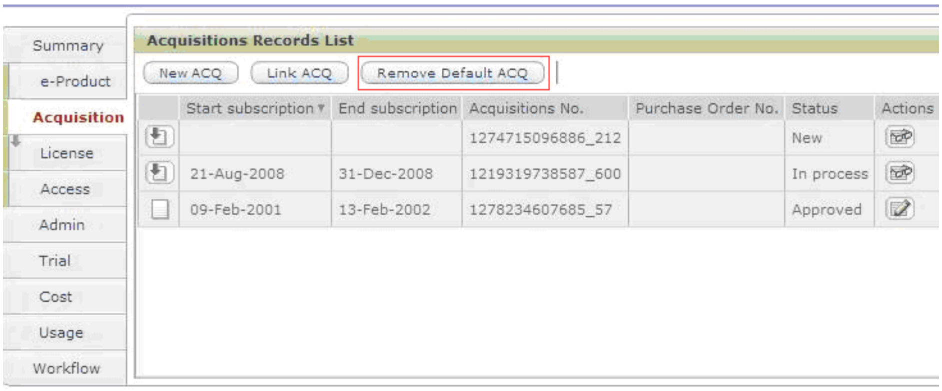

Figure 36: Remove Default Acquisition

Default License Records

There are two possible levels of default license records in a Verde instance:

- The top level default is defined by the Verde administrator from the Default Values tab in the Admin module. For details, see **Defining Default Values for a License Record** on page 527.
- The second level default is per individual user. Each Verde user that has create and edit license permissions may create a license default.
  - If there is no license default defined per user, the new license opens with the default values specified per instance.
  - If the license default defined per user exists, the new license opens with default values specified per user.

NOTE:
The **Remove Default License** button deletes default licenses defined per user. It does not remove default licenses defined per instance.

Default Access Records

It is possible to create a default for each access type. To remove the default for an access record, click **Remove Default Access** and select the access type for which you want to remove the default. The list of access types under the

Remove Default Access button includes only those access types that have default values.

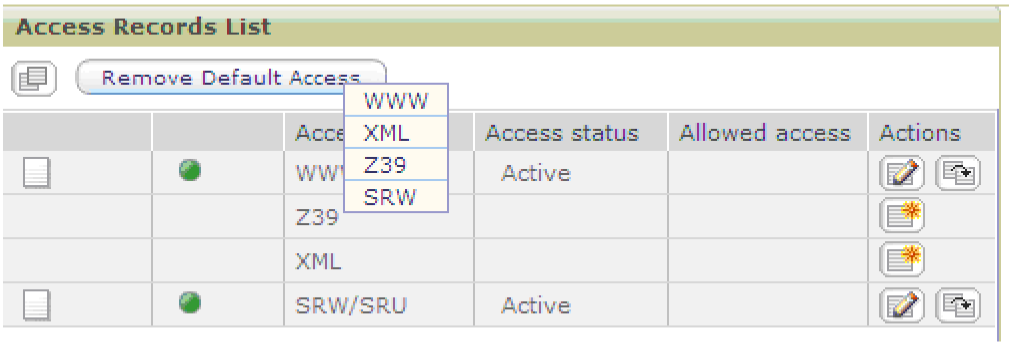

Figure 37: Default Access

E-Mailing Records

This section describes how you can e-mail records from Verde.

Overview

You can e-mail records from the e-Product, Acquisitions, License, Admin, and Access areas. The e-mail dialog box opens when a status is changed from these areas (if this option is configured – see **Configuring E-Mailing Records** on page 73 for details) or when you click the E-Mail button.

NOTE:
Since there is no Status field in the Admin attribute record, you can open the e-mail dialog box in this area only by the clicking the E-Mail button.

To e-mail a record:

1 Click the **E-Mail** button . The following dialog box opens:

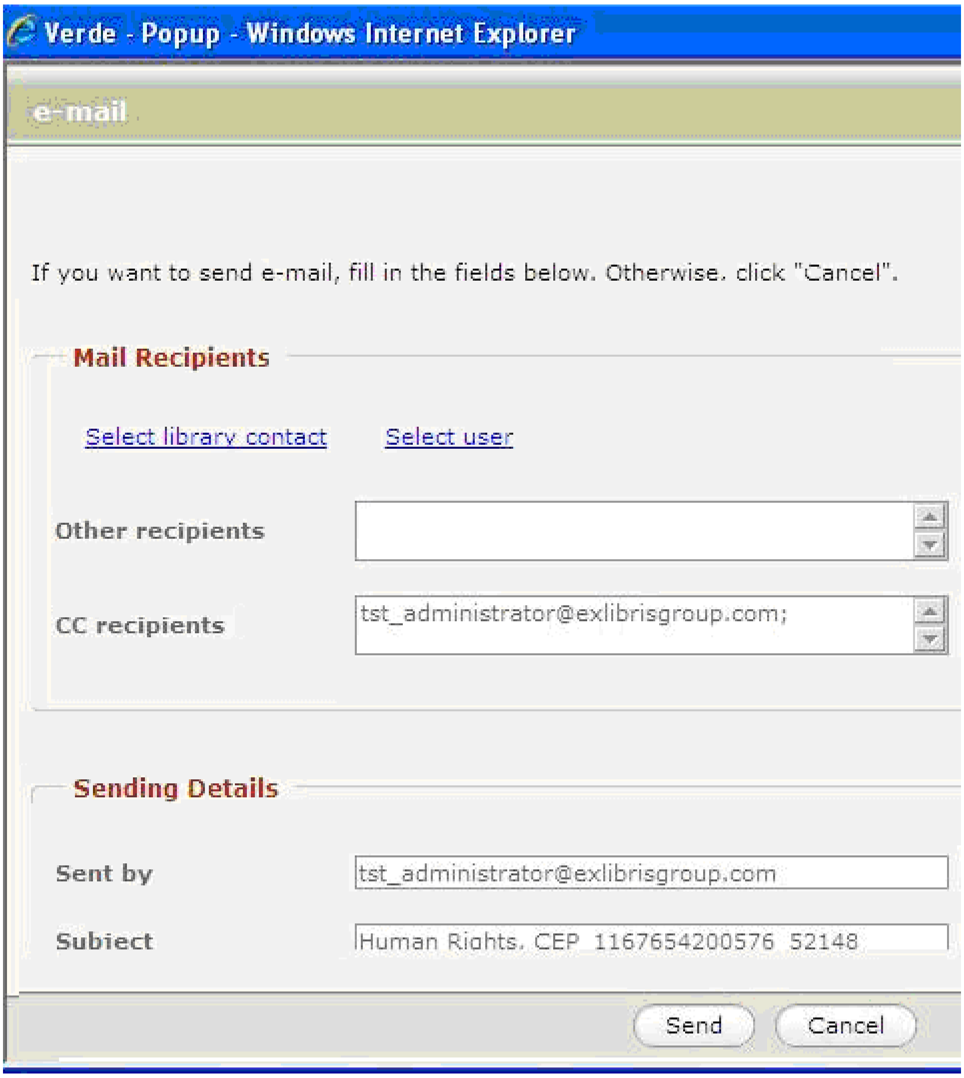

Figure 38: E-Mailing Records

2 Click **Select library contact**. The following dialog box opens:

Figure 39: List of Contacts

3 Enter the name of a specific contact in the **Jump to** text box to view this contact and select a role from the **Role** drop-down list to filter the results.

4 Click **Go**.

5 Select the check box next to the name of the person to whom you want to send the e-mail.

6 Click **Submit**.

7 Click **List of Users**. The following dialog box opens:

Figure 40: List of Users

8 Select the check box next to the name of the user to which you want to send the e-mail.

9 Click **Submit**.

10 In the **Other Recipients** text box, enter the e-mail addresses of any other people to whom you want to send the e-mail.

11 In addition to the recipients you specify, the e-mail is automatically sent to the address of the current user. To change this address, edit the address in the **CC Recipients** text box.

12 Edit the **Sent by**, **Subject**, and **Message** text boxes as required.

NOTE:
If you want to change the Subject or Message for all e-mails, contact your Implementation or Support representative.

13 In the **Comment** box, enter a comment.

14 Click **Submit**.

The e-mail is sent.

For each type of attribute record supported, there is one template that can be configured in the Admin module to be used both when a status change prompts an e-mail and when a user clicks the E-Mail button.

Configuring E-Mailing Records

The following features can be configured:

- The default contents of the subject of the e-mail
- The default contents of the body of the e-mail
- Whether the e-mail dialog box opens when the status of an e-product or attribute record is changed. The configuration is possible for each attribute record. The default is **No**. Note that this is not relevant for the access attribute record for which the default is **Yes**. For an e-product record, there are two invoke parameters: a change in the e-product status and a change in the selection status.
- Whether the list of e-product and attribute record fields contains values. This is not relevant for the access attribute record.

The configuration files are located at:

```
/exlibris/verde/$VERDE_BASE /verde/home/profile/
emailCustomization
```

There is a subdirectory for each instance. For example:

```
/exlibris/verde/v2_3/verde/home/profile/emailCustomization/INST1
```

For each attribute record, there is a default file that matches the attribute record name. For example:

```
AcquisitionEmailCustomization.xml
```

The file consists of the following two sections:

- `Email_Template` – You can configure the e-mail body and e-mail subject in this section. These fields contain placeholders by default, which appear in curly brackets {}. Placeholders from the e-mail body may be used in the e-mail subject and vice versa.

- `Email_Configuration` – You can set up `Include_other_information` and `change_of_status_invokes_email` parameters in this section. Possible values are `true` and `false`. If you set `Include_other_information` to `true`, a list of attribute record fields with values is included in the e-mail (for all but access records).

The following are examples of configuration files for e-mailing records:

e-Product

(EproductEmailCustomization.xml)

```
<ns:Email_Customization xmlns:ns="http://com/exlibris/verde/
email/xml">
        <Email_Template>
                <subject>{title}, {e-product code}</subject>
                <body>The following are the details for this
record:
e-product code {e-product code}
e-product status "{e-product status}"
selection status "{selection status}"
                </body>
        </Email_Template>
        <Email_Cofiguration>
                <include_other_information>true</
include_other_information>

<change_of_selection_status_invokes_email>false</
change_of_selection_status_invokes_email>

<change_of_eproduct_status_invokes_email>false</
change_of_eproduct_status_invokes_email>
        </Email_Cofiguration>
</ns:Email_Customization>
```

License

(LicenseEmailCustomization.xml)

```
<ns:Email_Customization xmlns:ns="http://com/exlibris/verde/
email/xml">
        <Email_Template>
                <subject>{title}, {e-product code}</subject>
                <body>The following are the details for this
record:
license code {license code}
license status "{license status}"</body>
        </Email_Template>
        <Email_Cofiguration>
                <include_other_information>true</
include_other_information>

<change_of_attribute_status_invokes_email>false</
change_of_attribute_status_invokes_email>
        </Email_Cofiguration>
</ns:Email_Customization>
```

Acquisition

(AcquisitionEmailCustomization.xml)

```
<ns:Email_Customization xmlns:ns="http://com/exlibris/verde/
email/xml">
        <Email_Template>
                <subject>{title}, {e-product code}</subject>
                <body>The following are the details for this
record:
acquisition code {acquisition code}
acquisition status  "{acquisition status}"
                </body>
        </Email_Template>
        <Email_Cofiguration>
                <include_other_information>true</
include_other_information>

<change_of_attribute_status_invokes_email>false</
change_of_attribute_status_invokes_email>
        </Email_Cofiguration>
</ns:Email_Customization>
```

Admin

(AdminEmailCustomization.xml)

```
<ns:Email_Customization xmlns:ns="http://com/exlibris/verde/
email/xml">
        <Email_Template>
                <subject>{title}, {e-product code}</subject>
                <body>The following are the details for this
record:
title "{title}"
e-product code {e-product code}
admin code {admin code}
                </body>
        </Email_Template>
        <Email_Cofiguration>
                <include_other_information>true</
include_other_information>
        </Email_Cofiguration>
</ns:Email_Customization>
```

Access

(AccessEmailCustomization.xml)

```
<ns:Email_Customization xmlns:ns="http://com/exlibris/verde/
email/xml">
        <Email_Template>
                <subject>{title}, {e-product code}</subject>
                <body>The following are the details for this
record:
access code {access code}
access status "{access status}"
access implementation status "{access implementation status}"
access type {access type}
                </body>
        </Email_Template>
        <Email_Cofiguration>
               <change_of_access_status_invokes_email>false</
change_of_access_status_invokes_email>

<change_of_access_implementation_status_invokes_email>true</
change_of_access_implementation_status_invokes_email>
        </Email_Cofiguration>
</ns:Email_Customization>
```

7

e-Product Records

This section includes:

- **Overview of the e-Product Tab** on page **77**
- **Adding New e-Product Records** on page **81**
- **Creating e-Product Sets** on page **85**
- **Editing e-Product Records** on page **88**
- **Deleting e-Product Records** on page **89**
- **List of e-Product Fields** on page **90**
- **Advanced Transfer Wizard** on page **95**

Overview of the e-Product Tab

When you click the **e-Product** tab in the left menu of the e-product screen, the e-product details pane is displayed. The pane contains the following four tabs:

- General Information
- Interoperability
- Libraries
- Local Fields

NOTE:
The Local Fields tab is populated only if local fields have been defined by the Verde administrator for e-product records.

General Information

This tab covers areas relating to:

- e-Product status

- Selection status
- Activation and expiry dates
- Availability
- Concurrent number of users
- Global coverage (for all e-products except e-interface)
- Local holdings and so forth (for all e-products except e-interface)
- Sponsoring library. Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined libraries with a filter by role option.

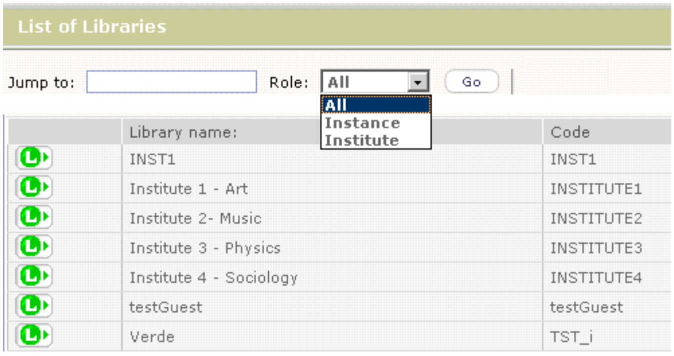

Figure 41: List of Libraries

- Library contact. Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with a filter by role option.

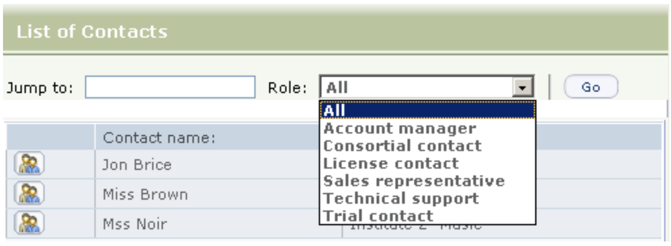

Figure 42: List of Contacts

- Interface provider (for e-interface)

- Make Dependent/ Independent button (only for e-constituents related to an aggregator package)

Figure 43: Make Independent

NOTE:

By default, e-constituents related to an aggregator package are dependent—that is, they inherit the e-product status, selection status, activation from date, and expiration date values from the related e-package. As a result, these four fields are usually displayed in read-only mode for e-constituents that are related to an aggregator package.

However, you can make an e-constituent independent by clicking the e-constituent's **Make Independent** button. After you click this button, the above-mentioned fields became editable and the e-constituent becomes essentially like an e-constituent that belongs to a selective package. (To return the e-constituent to a dependent state, click the **Make Dependent** button.)

Interoperability

This tab contains fields relating to:

- SFX ID
- MetaLib ID
- Update target (indicates the system for update. The value that is set on the package level applies to all the e-constituents.)
- e-Product code
- Additional IDs
- Creation date (automatically generated by Verde)

- Update date (automatically generated by Verde)

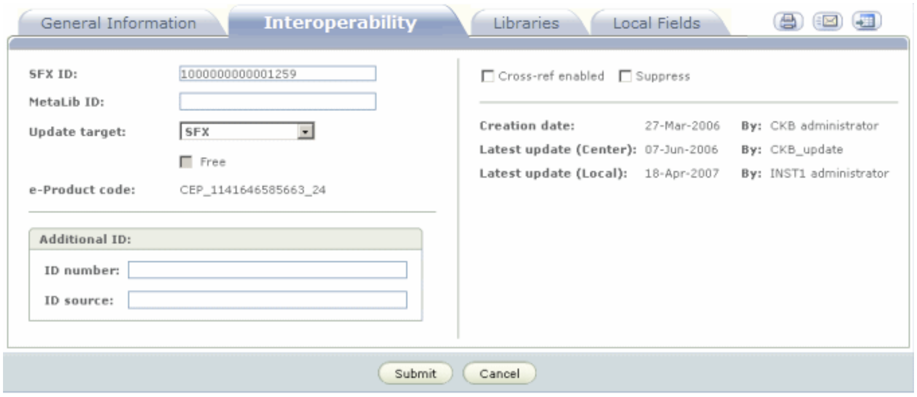

Figure 44: Interoperability

Libraries

This tab is available for all types of e-product records except e-interface records. It is used to list libraries that hold the e-product.

e-Products can be activated for:

- Individual libraries
- All libraries (select **All**)
- All libraries except specific ones (select **All** and then clear the check boxes for the libraries that should not be active)

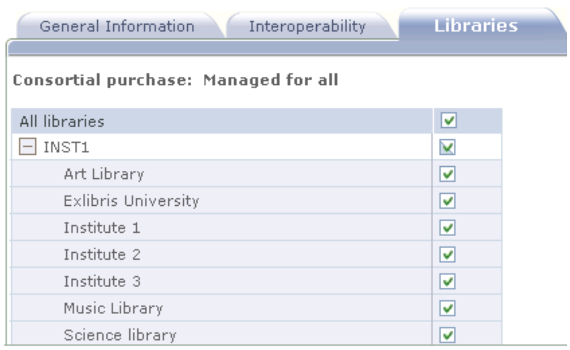

Figure 45: Libraries

An e-constituent inherits the library settings of its e-package. To activate additional libraries for the e-constituent, click the **Select Libraries** button in the e-constituent record's **Libraries** tab and select the additional libraries that hold the e-constituent.

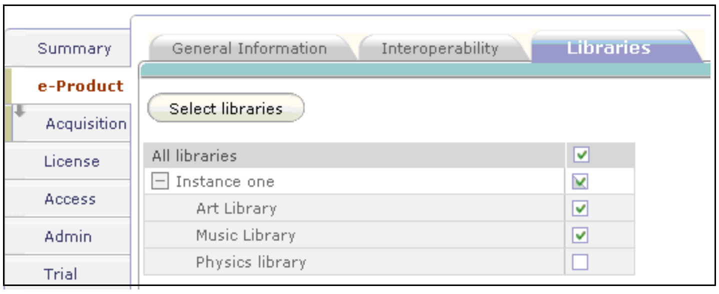

Figure 46: Selecting Libraries that Hold the e-Constituent

NOTE:

e-Constituents related to an aggregator package always inherit the library settings from the parent package and it is impossible to create independent library records for these e-constituents. An exception to this rule, however, is an independent e-constituent related to an aggregator package, which is essentially like an e-constituent that belongs to a selective package. For more information, see **General Information** on page 77.

The **consortium purchase** level of the e-product is set automatically by the system, based on the library settings. If the e-product is active for all libraries, the consortium purchase level is **Managed for all**, if it is active for some libraries, the consortium purchase level is **Managed for some**, and if it is active locally, the consortium purchase level is **Managed locally**.

NOTES:

Adding New e-Product Records

When the KnowledgeBase does not contain an e-product for a resource, you must create a new e-product record.

NOTE:

You can create an e-product record only if you have edit e-product permissions. For information on the lifecycle of locally created e-constituents and e-standalones, see **Lifecycle of Locally Created e-Constituents and e-Standalones** on page 84.

You can create an e-product record in one of the following ways:

- By creating an e-product set (e-package + e-interface or e-standalone + e-interface) using the Quick Add wizard or an alternative manual procedure. For more information, see **Creating e-Product Sets** on page **85**.
- By creating a work record and associating it with an e-product. For information about creating a work record, see **Adding New Work Records** on page **44**.
- By attaching an e-product to an existing work record, as described in this section.
- By loading multiple e-constituent or e-standalone e-products via e-constituent and e-standalone loaders. For more information, see **About Verde Loaders** on page **315**.

To attach an e-product to an existing work record:

1. In the e-product search result screen or e-product screen, click the **Open Work** button to open the e-product's work record. The work record contains the title and description of the e-product. Work records can be centrally or locally created. (For more information on work records, see **About Work Records** on page **43**.)
2. Click the **New** button that is displayed beside or above the work record. A drop-down list is displayed.
3. Select the appropriate e-product type from the drop-down list. Available types are: e-package, e-constituent, e-standalone, e-interface, and e-print. The system creates a new e-product record of the type selected. The new e-product record is automatically linked to the designated work record. Note that the system allows you to create e-product records only of the same e-product type that was assigned to the work record.

Table 5. Work Record e-Product Types

Work Record e-Product Type	Allowable Verde e-Products
BOOK	e-constituent, e-standalone, e-print
CITATION	e-constituent, e-standalone, e-print
CONFERENCE	e-constituent, e-standalone, e-print
DATABASE	e-constituent, e-standalone, e-print
DISSERTATION	e-constituent, e-standalone, e-print
DOCUMENT	e-constituent, e-standalone, e-print
Verde Interface	e-interface
JOURNAL	e-constituent, e-standalone, e-print

Table 5. Work Record e-Product Types

Work Record e-Product Type	Allowable Verde e-Products
Verde package	e-package
PROCEEDINGS	e-constituent, e-standalone, e-print
REPORT	e-constituent, e-standalone, e-print
SERIES	e-constituent, e-standalone, e-print

After the e-product record is created, enter the appropriate information in the **General Information**, **Interoperability**, and **Libraries** tabs and click **Submit**. In the **General Information** tab, ensure that you build the appropriate links between the e-product and its parent record by selecting the relevant e-package or e-interface in the **Belong to e-Package** or **Belong to e-Interface** field.

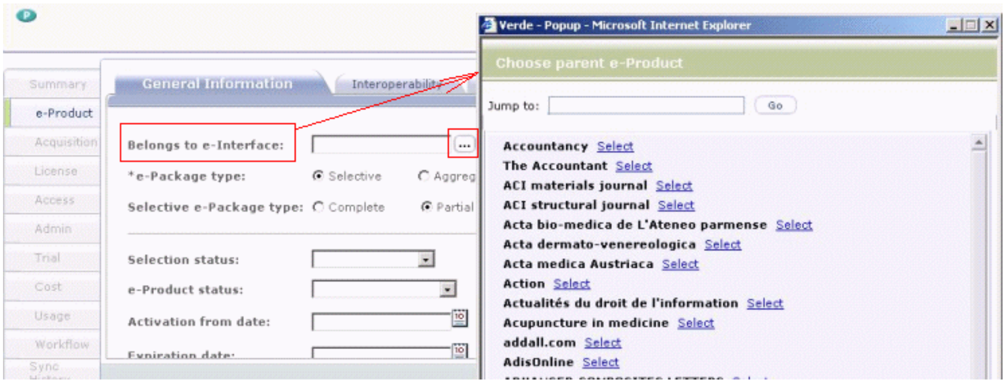

Figure 47: Belong to e-Interface

Lifecycle of Locally Created e-Constituents and e-Standalones

The following table describes the lifecycle of locally created e-constituents and e-standalones in chronological order.

Table 6. Lifecycle of Locally Created e-Constituents and e-Standalones

Action	Relevant e-Product Type	Verde Module in Which Action Is Performed
Create a work record	e-constituent, e-standalone	KB Manager or KB Tools > Loaders (e-constituent/e-standalone loader) For more information, see **Adding New Work Records** on page **44**. **Note:** A locally created e-product may be attached to a globally created work record, in which case this step is optional.
Create an e-product and associate it with a work record	e-constituent, e-standalone	KB Manager or KB Tools > Loaders (e-constituent/e-standalone loader) For more information, see **Adding New e-Product Records** on page **81**.
Add local data (such as license and acquisition records, and activation statuses and dates)	e-constituent, e-standalone	KB Manager
Create a matching SFX portfolio during Verde-SFX synchronization	e-constituent	Verde-SFX Synchronization For more information, see **Adding New Records** on page **621**.
A KB e-product match is created for locally created e-products during the LKB update process	e-constituent, e-standalone	LKB Update Wizard (server)
Identify the matching records	e-constituent, e-standalone	KB Tools > Transfer Local Data For more information, see **Transferring Local Data** on page **471**.

Table 6. Lifecycle of Locally Created e-Constituents and e-Standalones

Action	Relevant e-Product Type	Verde Module in Which Action Is Performed
Transfer the local data to the globally created e-product	e-constituent, e-standalone	KB Tools > Transfer Local Data For more information, see **Transferring Local Data** on page **471**.
Delete the SFX portfolio that you previously created	e-constituent	SFX – To access the SFX item from Verde, use the deep link from the Verde e-product.
Delete the locally created e-product	e-constituent, e-standalone	KB Manager For more information, see **Deleting e-Product Records** on page **89**.
Delete the work record you created (in the first step above)	e-constituent, e-standalone	For more information, see **Deleting Work Records** on page **47**.

Creating e-Product Sets

You can create an e-product set using the Quick Add wizard or a manual procedure. This section describes both ways of creating an e-product set.

The Quick Add Wizard

The Quick Add wizard contains five steps that allow for the quick creation of an e-package + e-interface or of an e-standalone + e-interface.

To create an e-product set using the Quick Add wizard:

1. In the e-product search result screen or e-product screen, click the **Quick Add** button in the top-right corner to launch the wizard. In the first screen, select **e-Package** or **e-Standalone** from the **Type** drop-down list and click **Next**.
2. In Step 2, enter the e-package or e-standalone basic bibliographic details. Note that the e-package **Title** field is mandatory, as are the e-standalone **Title** and **Type** fields. Click **Next** to continue.

NOTES:

- If the main title is in Chinese or Korean, you must define the language in the **CJK Language** field.
- For information regarding 13-digit ISBN numbers, see the note at the end of the following section: **Adding New Work Records** on page **44**.

3 In Step 3, enter the e-package or e-standalone status details. Note the following:

- For e-package – The e-package type fields are mandatory. If the **Activation from** field is filled in, **e-Product status** is mandatory. If the **e-Product status** field is filled in, but the **Activation from** field is left empty, the current date is registered.
- For e-standalone – If the **Activation from** field is filled in, the **e-Product status** field is mandatory. If the **e-Product status** field is filled in, but the **Activation from** field is left empty, the current date is registered.

Click **Next** to continue.

4 In Step 4, choose **Select e-Interface** to access a list of existing e-interfaces. When the list is displayed, you can browse alphabetically through the list, or search for an e-interface by entering a search string in the search box. Once the e-interface has been found, click the **Select e-Interface** button to add it to the record. Click **Next**.

If an e-interface does not exist, select **Create new e-Interface**, enter the e-interface name in the **Title** box, and click 

. A new e-interface work

record is automatically created with the title that you previously entered in the **Title** box. You can modify this title or leave it as is.

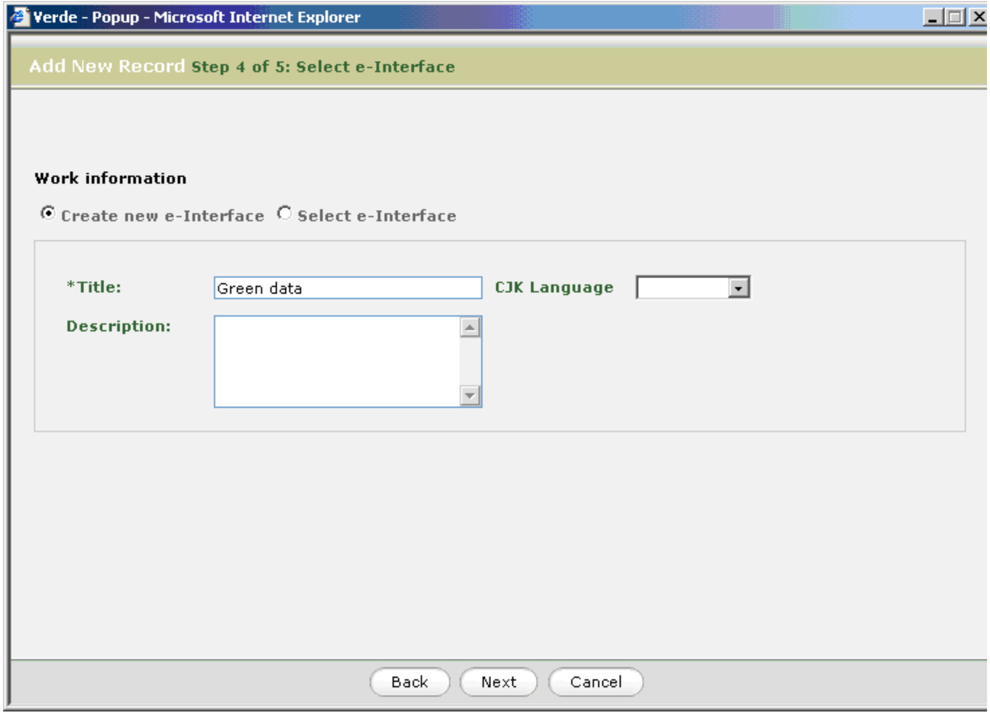

Figure 48: Add New Record – Step 4 Select e-Interface

5 In Step 5, select one of the following options:

- **Exit** – Closes the wizard and takes you back to your original screen.
- **Add another record** – Takes you back to Step 1 to add another record using the wizard.
- **Edit the new e-product** – Takes you to the edit screen for the e-product.

Creating an e-Product Set Manually

If you want to create an e-product set and do not want to use the Quick Add wizard, you can create an e-product set manually by following the steps below.

To create an e-product set manually:

1. Create an e-interface.
2. Create an e-package or e-standalone.
3. Open the e-product that you created in the previous step and click **Belong to e-Interface**. The Choose e-Product window opens displaying a list of e-interfaces.

4 In the **Jump to** box, enter the title of the e-interface that was created in step Step 1 above.

5 Select the e-interface from the list and submit the e-product. The e-product set is created with a hierarchical relationship.

Editing e-Product Records

To edit an e-product record, you must have write privileges for the instance as well as edit e-product permissions. This section describes how to edit e-constituent records, as well as e-package and e-standalone records.

NOTE:
When updating an e-product record, you can update only local e-product fields. Global fields that are maintained by Ex Libris via the KnowledgeBase—such as **e-Product type**, **e-Package type**, and **Global holdings**—cannot be edited.

Editing e-Constituent Records

e-Constituent records always belong to an e-package. The status fields that can be updated vary depending on the package type of the e-constituent's parent. If the e-constituent belongs to an aggregator package and is dependent, none of the four status-related fields can be updated because in aggregator packages, these fields are controlled exclusively on the package level.

With selective package e-constituents, you have more flexibility. The values of all four status fields can differ from the value of the same field in the e-constituent's parent. However, there are rules that govern the interaction between the fields in the e-constituent and those in the e-package. The rules are as follows:

- To activate an e-constituent, the e-package must itself be active. Note that unlike e-interfaces, e-packages are never automatically activated.
- If an e-package has been rejected and withdrawn, all of its e-constituents become inactive and withdrawn.

For more information about the interaction between e-packages and their e-constituents, as well as the approval and activation processes, see **Selection Processes** on page 107.

e-Constituents have five fields that are set globally:

- SFX ID
- Global holdings
- Global embargo

- JKEY
- Belongs to package

Editing e-Package and e-Standalone Records

e-Package and e-standalone records are both attached to e-interfaces. When activating an e-package or e-standalone, the system checks the status of the attached e-interface record. If it is not already active, the system activates it using the same **Active from** date as the lower-level record. The e-product status is set to **Production**.

e-Package records have six fields that are set globally:

- e-Product type
- e-Package type
- Global holdings
- Global embargo
- SFX ID – In e-package records, this is the SFX Target Service Internal ID. In e-standalone records that come from SFX, this is the SFX Object Portfolio Internal ID.
- Belongs to interface

All other fields can be set locally. Note that e-packages rarely have global holdings data.

e-Standalone records have five fields that are set globally:

- e-Product type
- Global holdings
- Global embargo
- Belongs to interface
- SFX ID – This is the SFX Object Portfolio Internal ID

Deleting e-Product Records

In a single-instance environment, e-product records that were created locally can be deleted only if the e-product record does not have any associated attribute records. If an e-product has associated attribute records, these records must be deleted before you can delete the e-product record. In a consortium environment, locally created e-products are automatically propagated to other instances. These e-products can be deleted only if they can be deleted in all instances.

e-Products that are part of the KnowledgeBase cannot be deleted.

NOTE:
You can delete an e-product only if you have delete e-product permissions.

List of e-Product Fields

Verde uses a single database table for all e-product types. This table contains some fields that are common to all types and other fields that are specific to one e-product type. The following table lists the fields, field types, and field usage.

Table Legend

- A = Field is present in all types
- P = Field is present in e-package
- I = Field is present in e-interface
- S = Field is present in e-standalone
- C = Field is present in e-constituent
- * = required field

Table 7. List of e-Product Fields

Tab	Field Name	Type	Description
General Information	e-Product type*	A	Interface, Package, Standalone, Constituent, Print. This field cannot be updated.
	e-Package type*	P	Type of e-package – selective or aggregator
	Selective e-package type	P	Are you purchasing the entire e-package?
	Selection status	A	Current selection status of the e-product. Values are: ■ Withdrawn by Publisher ■ Review ■ Approved ■ Final Approval ■ Rejected ■ Evaluation
	e-Product status	A	Implementation status of the e-product. Values are: ■ Trial ■ Implementation 1, 2, and 3 ■ Production ■ Withdrawn
	Activation from date	A	Date from which the e-product is active

Table 7. List of e-Product Fields

Tab	Field Name	Type	Description
General Information	Expiration date	A	Date until which the e-product is active. When this date is reached, Verde will change the e-product status to **Withdrawn**.
	Availability status	A	Availability status – default for an active e-product is **available**. If the e-product is unavailable, then set the value of this field to **down**.
	Availability status start date	A	Start of the period when the e-product is unavailable
	Availability status end date	A	End of the period when the e-product is unavailable
	Availability note	A	Note to accompany availability status
	Concurrent number of users	A	Concurrent number of users for this e-product
	Sponsoring library	A	Library 'responsible' for the e-product
	Library contact	A	Library contact name
	Interface provider	I	Organization responsible for the interface
	Public note	A	This note can display in external applications such as the OPAC, A-Z lists, and SFX.
	Internal note	A	This note is displayed to Verde staff only.
	Global coverage from Year, Vol. Issue	P, C, S	Coverage available from the vendor. These fields cannot be updated.
	Global coverage to Year, Vol. Issue Year	P, C, S	Coverage available from the vendor. These fields cannot be updated.
	Global embargo operator	C, S	Type of embargo – from X months or up to X months. This cannot be updated.

Table 7. List of e-Product Fields

Tab	Field Name	Type	Description
General Information	Global embargo	C, S	Number of months that are embargoed. This cannot be updated.
	Local holdings from Year, Vol. Issue	P, C, S	Coverage available locally. These three fields are repeated three times.
	Local holdings to Year, Vol. Issue	P, C, S	Coverage available locally. These three fields are repeated three times.
	Holdings note	P, C, S	
	Local embargo	C, S	Type of embargo - from X months or up to X months. This field can be updated.
	Local embargo type	C, S	Number of months that are embargoed locally. This field can be updated.
	ILS holdings ID	P, C, S	Pointer to holdings record in ILS

Table 7. List of e-Product Fields

Tab	Field Name	Type	Description
Interoperability	MetaLib ID	A	Pointer to matching record in MetaLib
	SFX ID	A	Pointer to matching record in SFX
	Update target	A	Should update information to be sent to: ■ SFX ■ SFX and MetaLib ■ MetaLib ■ ILS ■ Empty
	Free	A	Is the resource available free of charge?
	Additional ID number	A	Pointer to record in alternate system
	ID source	A	ID of alternate system
	JKEY	C, S	Used for linking. This is a global field that cannot be changed.
	Title key	C, S	Locally defined abbreviated title that can be added to the URL for direct linking
	Cross ref enabled	P, S	The check box can be selected when the SFX customer is a CrossRef library affiliate member and linking to article level is available via CrossRef.
	Suppress	A	Indicates if the e-product is hidden from Public View. Not functional.
	Creation date	A	The date the record was created. Automatically generated by Verde.
	Created by	A	Verde user
	Updated by	A	Verde user

Table 7. List of e-Product Fields

Tab	Field Name	Type	Description
Interoperability	Latest update date (CKB)	A	CKB update date. Date on which the KB record was updated by Ex Libris in the Central KB. Automatically generated by Verde.
	Latest update date (Local)	A	LKB update date. Automatically generated by Verde.
Libraries	Consortial purchase	P, C, S	Possible values are: ■ Full – purchased for every member of the consortium ■ Partial – purchased for some members of the consortium ■ Local – purchased locally
	Libraries	P, C, S	Option to define the libraries that have the e-product, together with details of their holdings

Advanced Transfer Wizard

The Advanced Transfer wizard is used for quick transfer of local data from one e-product to another. Use the wizard if you mistakenly created local data on an "incorrect" e-product and would like to move it to the "correct" e-product. The wizard allows transferring local data among a wide range of e-products.

If you would like to transfer data from locally created e-products to their matching globally created e-products, you can use the Transfer Local Data screen in the KB Tools module. This screen allows you to search and filter locally created e-products, view the matching globally created e-products, and transfer data from a locally created e-product to its matching globally created e-product. For more information about the Transfer Local Data tool of the KB Tools module, see the section **Transferring Local Data** on page **471**.

Working with the Advanced Transfer Wizard

To transfer local data:

1. Add the source e-product (the e-product from which you want to transfer data) to the basket.
2. Add the target e-product (the e-product to which you want to transfer data) to the basket.

3 Open the basket. The list of e-products added to the basket appears.

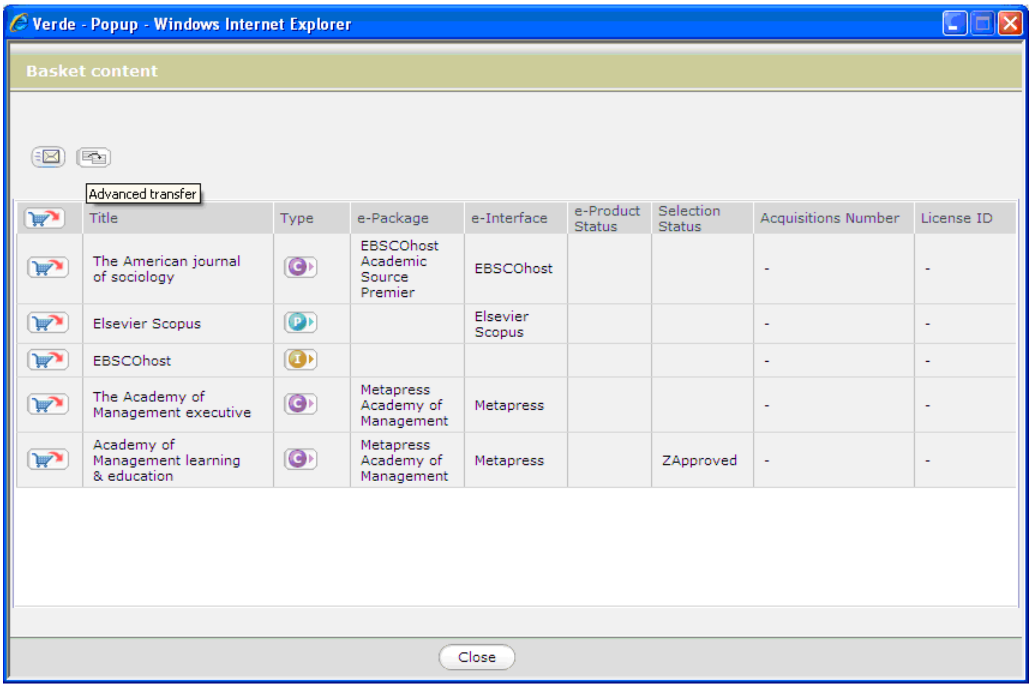

Figure 49: e-Products Added to the Basket

4 Click the **Advanced Transfer** button. The Define the Source e-Product window opens.

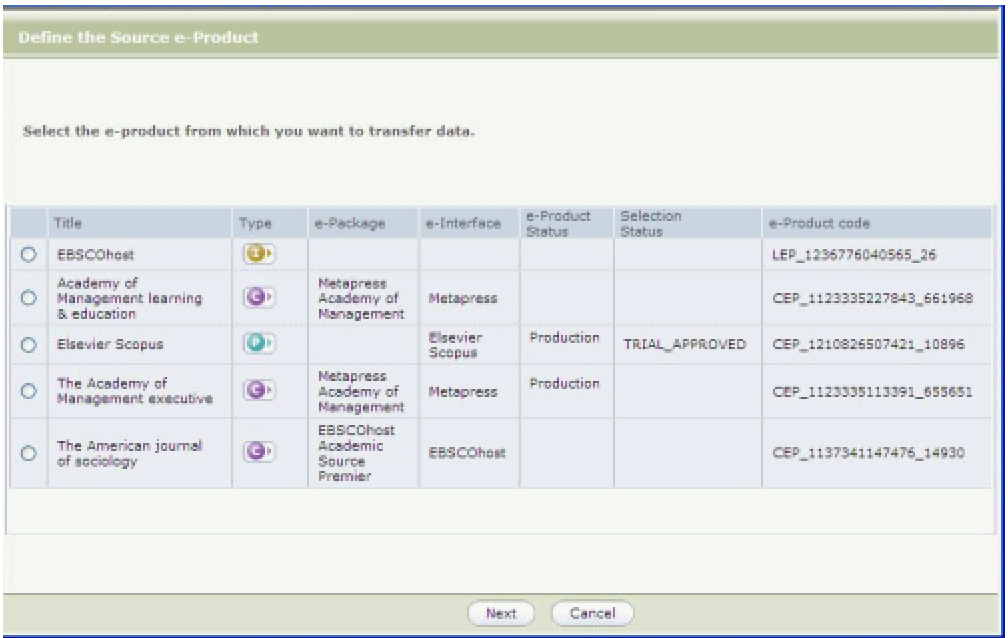

Figure 50: Define the Source e-Product

5 Select the e-product from which you want to transfer data and click **Next**. The Define the Target e-Product window opens. Note that the list of potential targets includes only those e-products that have the same e-product type as their source e-products. For details, see **Advanced Transfer Process Rules** on page **100**.

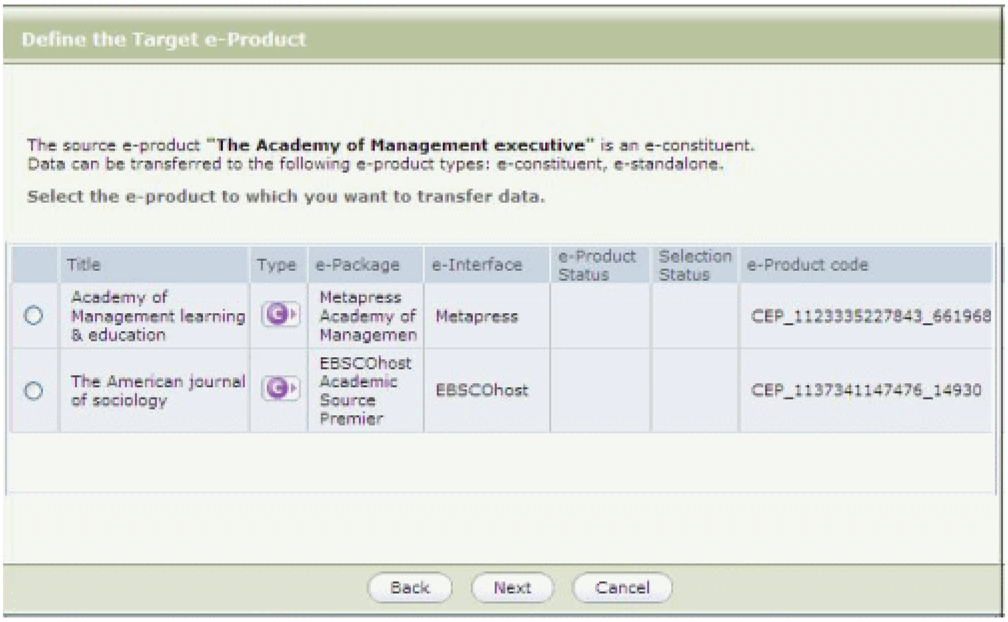

Figure 51: Define the Target e-Product

6 Select the e-product to which you want to transfer data and click **Next**. The The Data to Be Transferred window opens.

There are two possible options in this window:

- Transfer all local data
- Transfer all local data except activation data. Activation data includes the e-product status, the selection status, the activation date, the expiration date, the e-product libraries, and the coverage and embargo data.

However, if the target e-product is an e-constituent and there is a conflict between the activation statuses/dates of the source e-product and the package related to the target e-constituent, only the second option is available. For details, see **Advanced Transfer Process Rules** on page **100**.

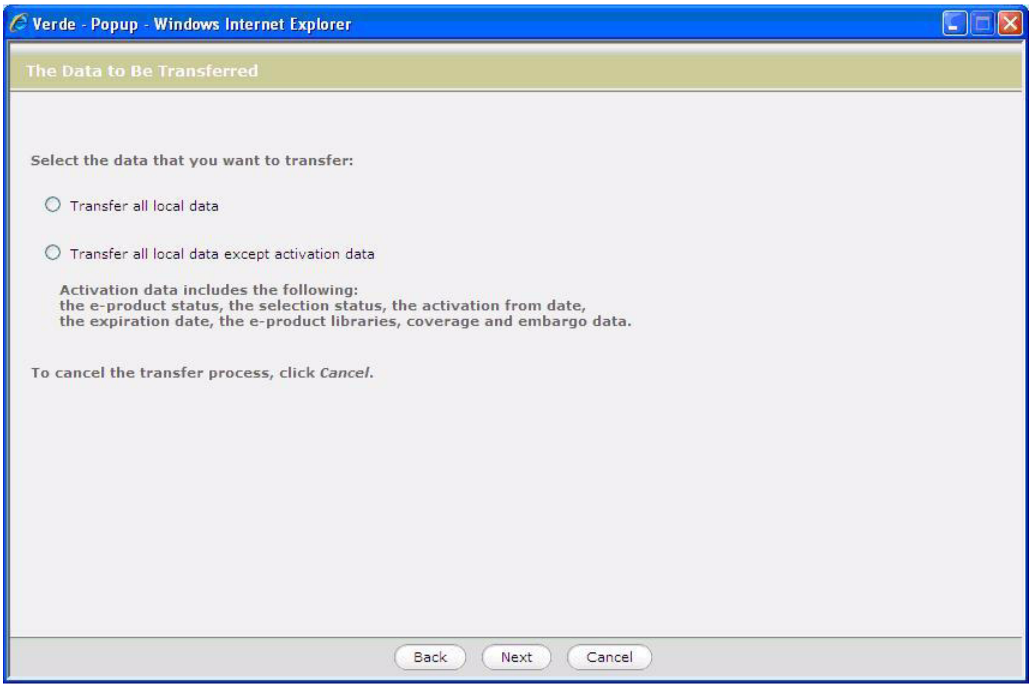

Figure 52: Data to Be Transferred

7 Select the required transfer option and click **Next**. Usually, a Warning window opens that displays differences in activation data between the source and target e-products.

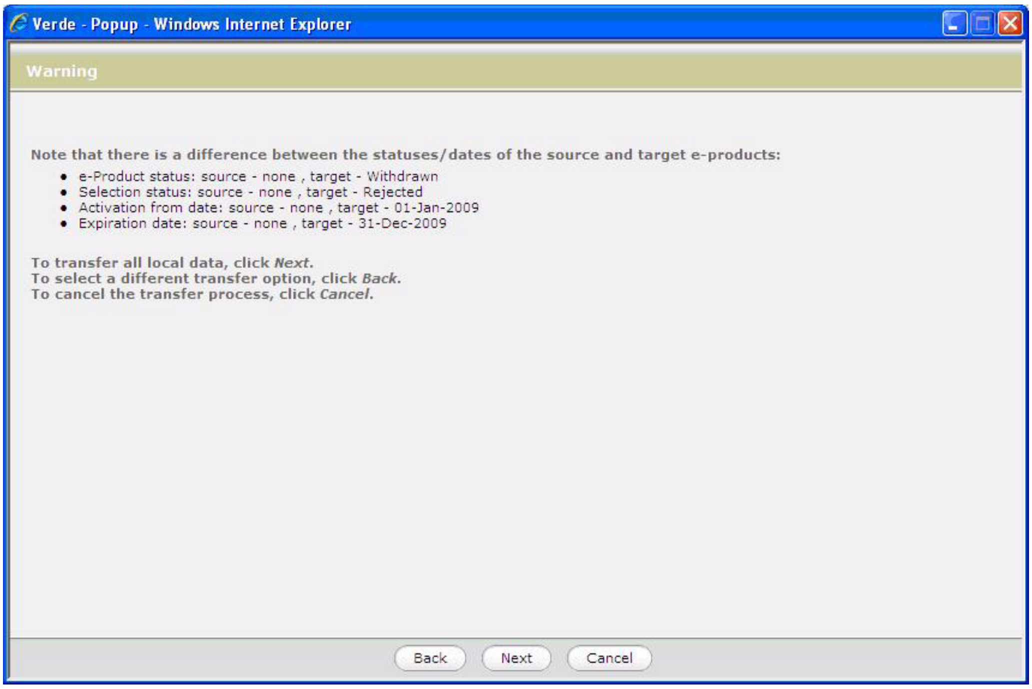

Figure 53: Warning

For a full list of possible warnings, see **Advanced Transfer Process Rules** on page **100**.

8 Click **Next** to allow the transfer of local data. The Confirmation screen opens, displaying the source and target e-products with the related

"parents," such as e-package and e-interface for e-constituent, and e-interface for e-package and e-standalone.

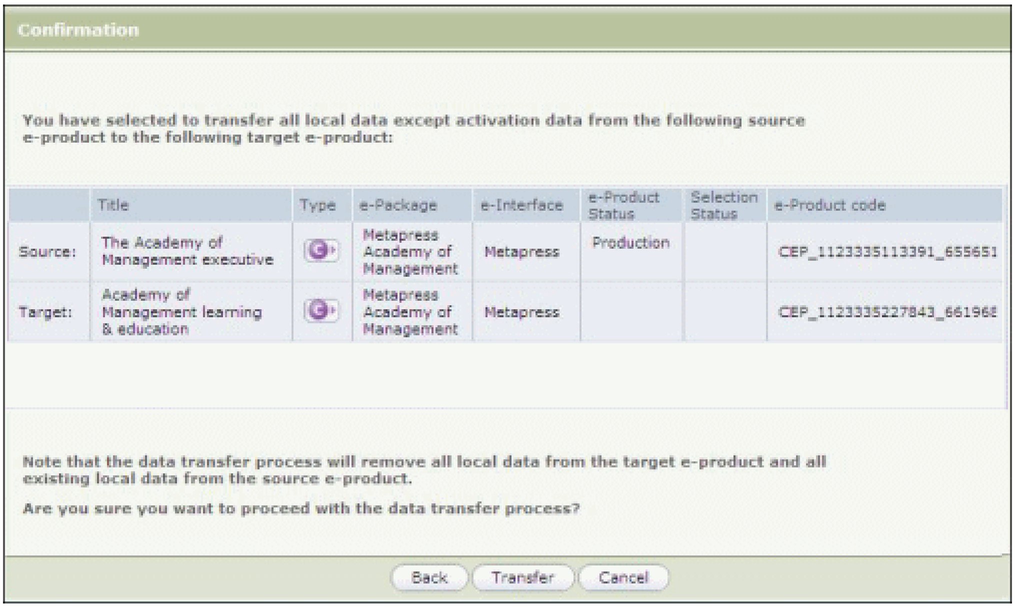

Figure 54: Confirmation

9 Click the **Transfer** button to transfer local data from the source to the target e-products.The data transfer process removes all local data from the target e-product and all existing local data from the source e-product.

Note that you can return to the previous step at each step of the Advanced Transfer wizard by clicking the **Back** button or cancel the transfer by clicking the **Cancel** button.

NOTE:
After transferring local data, navigation crumbs do not display the transferred attributes of the target e-product because the navigation crumbs are not refreshed. To see the updated record properly, do not use navigation crumbs to access the e-product, but rather search for it again, or select it from the package list (in the case of an e-constituent).

Advanced Transfer Process Rules

- The wizard transfers local data from one e-product to another. Local data is data created by a user and includes the following:
  - Activation data – e-product status, activation start and expiration dates, and active libraries
  - Attributes – acquisition, license, access, admin, trial, cost, and usage
  - Local fields related to attributes

    - e-Product fields (such as Sponsoring library, Library contact)
    - Local e-product fields

    For the full list of transferred fields, see **List of Transferred e-Product Fields** on page 102.

- The wizard transfers local data regardless of whether the the source and the target e-products are global or locally created, as follows.

Table 8. Source and Target e-Products

From	To
Locally created e-product	Locally created e-product
Locally created e-product	Global e-product
Global e-product	Global e-product
Global e-product	Locally created e-product

- The following e-product types are available for transfer.

Table 9. e-Product Types Available for Transfer

From	To
e-constituent	e-constituent
e-constituent	e-standalone
e-standalone	e-constituent
e-standalone	e-standalone
e-standalone	e-package
e-package	e-standalone
e-package	e-package
e-interface	e-interface

- Transfer of activation data is not allowed in the following cases:
    - Local data from an active constituent is transferred to an e-constituent related to an inactive package.
    - Local data from an active constituent is transferred to an e-constituent related to an active package and the activation dates of the e-constituent are not within the same range as the activation dates of its related e-package, which occurs in the following cases:

    - The **Activation from** date of the source e-constituent is earlier than the **Activation from** date of the e-package related to the target e-constituent.
    - The **Expiration date** of the source e-constituent is later than the **Activation from** date of the e-package related to the target e-constituent.
    - The source e-constituent has no **Expiration date**, while the e-package related to the target e-constituent has an **Expiration date**.
  - The target e-constituent is related to an aggregator package and the start/end dates and/or the e-product status and/or selection statuses are different between the source e-constituent and the package related to the target e-constituent.
- Warnings will be displayed in the following circumstances:
  - If there is a difference between e-product statuses, selection statuses, **Activation from** dates and expiration dates of the source and the target e-products.
  - If there is a difference between the **Update target** value of the source and the target e-products.
  - If an active trial record or a trial record that will be active in the future is to be transferred. The trial status and dates will be displayed.
  - If the source e-product is an e-standalone that has a trial record and the target e-product is an e-constituent. The trial record cannot be transferred to the target e-constituent because e-constituents cannot have trial attributes. The trial data will remain as part of the source e-product.
  - If there is at least one active workflow in the source or the target e-product. This workflow will be stopped.
  - If the source e-product is an e-standalone that has embargo data and the target e-product is an e-constituent. Embargo cannot be transferred to the target e-package because embargo is not an allowed field for an e-package. The embargo value will be removed from the source e-standalone.
- The Workflow attribute is not transferred. Workflows related to the source and the target are stopped. A warning will be displayed if there is a workflow/s attached to the source or the target.
- Availability data (**Availability from**, **Availability to** and **Availability notes**) is not transferred.

List of Transferred e-Product Fields

The following table lists the e-product fields that are transferred from the source to the target e-product. Note that local fields of e-products are transferred also.

Table 10. List of Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
Selection status	G_PROCUREMENTSTATUS	The selection status of the e-product. The field is not transferred when the **Transfer all local data except activation data** option is selected.
	G_PROCUREMENTSTATUS UPDATEDATE	The date when the selection status was updated. The field is not transferred when the **Transfer all local data except activation data** option is selected.
e-product status	G_EPRODUCTSTATUS	The implementation status of the e-product. The field is not transferred when the **Transfer all local data except activation data** option is selected.
	G_EPRODUCTSTATUS UPDATEDATE	The date when the e-product status was updated. The field is not transferred when the **Transfer all local data except activation data** option is selected.
Activation from date	ACTIVATIONFROMDATE	The date when the e-product becomes active. The field is not transferred when the **Transfer all local data except activation data** option is selected.
Expiration date	ACTIVATIONTODATE	The date when the e-product stops being active. The field is not transferred when the **Transfer all local data except activation data** option is selected.

Table 10. List of Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
	G_SFXACTIVATIONFLAG	The field is not transferred when the **Transfer all local data except activation data** option is selected.
MetaLib ID	G_METALIBID	A pointer to the matching record in MetaLib
ID number	G_OTHERID	A pointer to the record ID in an alternate system.
ID source	G_OTHERSOURCE	The name of the alternate system.
Internal note	G_PRIVATENOTE	A note displayed to the Verde staff only
Concurrent Number of Users	CONCURRENTNUMBEROF USERS	The number of concurrent users for the e-resource. Relevant to e-packages, e-interfaces, and e-standalones.
Library contact	MAINCONTACT	The library's contact name. Points to the ORGCONTACTCODE field in the ORGANIZATION CONTACT table.
Sponsoring Library	SPONSERINGLIBRARY	The library responsible for the e-product. Points to the ORGANIZATION CODE field in the ORGANIZATION table.
Public note	COM_PUBLICNOTE	A note displayed in external applications such as the OPAC, A-Z lists, and SFX. Currently not functional.

Table 10. List of Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
Suppress	COM_SUPPRESS	Indicates if the e-product is hidden from public view. Not functional.
Cross-ref enabled	ER_CROSSREFENABLED	The check box can be selected when the SFX customer is a CrossRef library affiliate member and linking to article level is available via CrossRef.
ILS Holdings ID	ER_PR_HOLDINGSNOTE	A pointer to the MARC record in ILS.
Title key	S_C_TITLEKEY	A locally defined abbreviated title that can be added to the URL for direct linking.
Interface provider	I_ORGANIZATIONCODE	The interface provider. Relevant only for the e-interface e-product type.

8

Selection Processes

This section includes:

- About Selection Processes on page 107
- Evaluation on page 108
- Review on page 109
- Approval and Final Approval on page 109
- Rejection on page 110
- Activation on page 111
- Table of e-Product Updates on page 112

About Selection Processes

The value selected in the e-product record's **Selection status** field determines the e-product selection process that will be followed.

Verde supports the following e-product selection processes:

- Evaluation
- Review
- Approval
- Rejection
- Activation

The e-product selection process involves online and batch updates, as well as Verde reports. The process relies on relationships between e-product records, as well as relationships between e-product and acquisition records. The e-product selection process is closely related to acquisition process. For more information about acquisition processes, see Acquisition Processes on page 134.

Evaluation

e-Products can be evaluated as part of the trial process, or independently of this process. To initiate the e-product evaluation process, assign the selection status **Evaluation** to the e-product. If the e-product is an aggregator package, the selection status of all dependent e-constituents related to this package is updated to **Evaluation**. If the e-product is a selective package, you use the **Update** button in the e-package list to update the selection status of the package and all its e-constituents to **Evaluation**.

NOTES:

- It is recommended that you assign the **Evaluation** selection status only to e-products that are not active.
- If an e-product is assigned a **Trial** status, Verde automatically assigns a selection status of **Evaluation** to the e-product.

After an e-product has been assigned a selection status of **Evaluation**, e-product selectors review the e-product and assign it a new selection status of **Approved** (e-constituent), **Final Approval** (e-package, e-standalone or e-interface), or **Rejected**. Note that the e-product selection status is indexed and can be searched online using the status index. The e-Products by Selection Status Verde report can also be used for this purpose.

Evaluating e-Constituents

During the evaluation process, selectors review e-constituents and update their selection status to **Approved** or **Rejected**.

e-Constituents of selective packages can be updated by clicking the e-constituents' **Update** buttons in the package list. You can updated multiple e-constituents by adding them to the basket and using the update function in the basket. In addition, an e-constituent loader exists to simultaneously update the status of large groups of e-constituents within a package. For more information on the e-constituent loader, see **e-Constituent Input Files** on page 327.

NOTE:

e-Constituents of selective packages should be reviewed and approved or rejected after the e-package has been approved, but before the e-package is updated to **Final Approval** or **Rejected**.

Review

The review process is performed regularly for subscriptions that are not automatically renewed, typically on an annual basis. During the review process, selectors evaluate acquisition records and the e-products that are purchased through these records, paying attention to both usage and cost data. At the end of the review process, e-products are either approved and the acquisition records renewed, or they are rejected and the acquisition records are cancelled. For more information on renewing acquisition records, see **Acquisition Processes** on page **134**.

Both the acquisition and selection status **Review** can be assigned manually, or automatically using the Verde task **Subscriptions for Review**. The automatic process retrieves the e-products of acquisition records that are not marked **Auto-renew** and updates both the acquisition record and the e-product that is being acquired by assigning them an acquisition status and selection status of **Review**.

During the review process, e-products are reviewed and approved or rejected. For aggregator packages, because the packages must be purchased in their entirety, the review process is conducted on the level of the package and not its e-constituents. Thus, when aggregator e-packages are updated to **Review**, their e-constituents are updated as well (all e-constituents that are defined as dependent). Similarly, the e-constituents cannot be individually approved or rejected. In contrast, when selective packages are updated to **Review,** their e-constituents must be manually updated to **Review** using the **Update** buttons in the package list. The approval/rejection process for e-constituents in selective packages must be performed in the same way.

To approve an e-package, e-interface, or e-standalone, assign a selection status of **Final Approval**. To approve e-constituents of selective packages, assign a selection status of **Approved**.

NOTE:
It is recommended that the final approval/rejection of packages be performed after all of the package's e-constituents have been approved or rejected.

Approval and Final Approval

Approval can follow evaluation or review.

The selection status **Approval** is used to indicate preliminary approval. When this status is assigned to a selective package, it means that the review of the package e-constituents should begin. When this status is assigned to any other e-product, it means that there is preliminary but not final approval.

The selection status **Final Approval** means that the e-product has been approved either for activation or for renewal. The status **Final Approval** can be assigned directly to e-products of type e-interface, e-package, and e-standalone. It should not be assigned directly to e-constituents. e-Constituents are updated by the system as a result of an update to their e-package record, or manually, using the **Update** buttons in the package list.

The following rules apply to e-constituent updates:

- Aggregator Packages – When the package is updated to a selection status of **Final Approval**, the selection status of all e-constituents that are defined as dependent is automatically updated to **Final Approval**.
- Selective Packages – Use the filter in the package list to filter for approved e-constituents. Then use the **Update** buttons to update the selection status of each e-constituent and activate it.

Rejection

Rejection can occur as part of an evaluation or a review process, or it can occur independently. Rejecting an active e-product has very different consequences than rejecting an inactive one.

When an active e-product is rejected, an **Activation to date** is assigned either by you or by the system. The **Activation to date** controls when the e-product is withdrawn. If there is an active acquisition record, the **Activation to date** uses the **Subscription end date** found in the acquisition record. If there is no acquisition record, the current date is used as the **Activation to date**. You can change this date manually.

There is no need to update e-products that are not yet active and have been rejected. In these cases, the selection status is retained for historical purposes. For more information about rejection as part of a trial, see **Trial Process** on page **186**.

Rejecting an aggregator package affects all of the package's e-constituents that are defined as dependent. The selection status of each of the e-constituents is updated to **Rejected** and an **Activation to date** is assigned. Rejecting a selective package involves a manual process. You use the filter function in the package list to select all active e-constituents, and then use the **Update** buttons to update the selection status of each of the e-constituents to **Rejected** and assign an **Activation to date**.

NOTE:
The status of active e-products that have been rejected is not updated to **Withdrawn** online. Instead, Verde updates the e-product status to **Withdrawn** based on the **Activation to date** of the e-product record, using a process that is regularly run.

Activation

Activation typically occurs after the evaluation process is run. However, e-products can be activated without conducting an evaluation process. Activation can be performed online, or by using the Verde e-constituent loader. In Verde, e-products are considered active when they have an e-product status and an **Activation from date**.

Online, you can assign an e-product status and then submit the e-product. If there is an acquisition record with the status **Active**, the system uses the **Subscription start date** as the e-product **Activation from date**. If there is no acquisition record, the current date is used.

Activating e-Standalones, e-Interfaces, and Aggregator Packages

To activate e-standalones, e-interfaces, and aggregator packages, activate the e-product itself. When an e-standalone or e-package is activated, the system automatically activates the related e-interface, if it is not already active.

The e-interface is always assigned an e-product status of **Production**. The **Activation from date** is the date entered in the related e-product. When you activate an aggregator package, its dependent e-constituents are assigned the same e-product status and **Activation from date** as the e-package.

Activating Selective Packages

This process is somewhat more complex than it is for other e-products because of the complexity of the interaction between e-constituents and their packages. The e-constituents of selective e-packages can be selectively activated in cases where some, but not all, of the e-constituents are purchased.

When a selective e-package is activated, a message appears to remind you that the e-constituents related to the package should be updated accordingly.

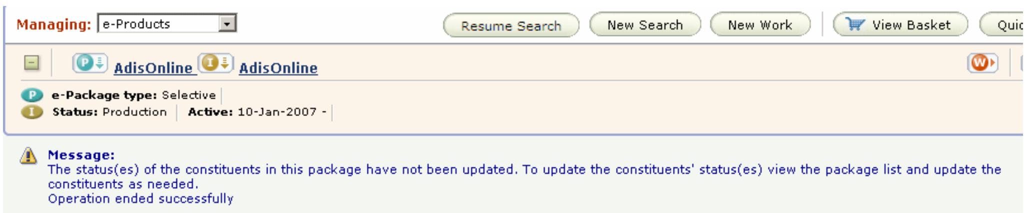

Figure 55: Selective e-Package Message

You use the filter function in the package list to select all the approved e-constituents that you want to activate, and then use the **Update** buttons to activate each of the e-constituents. Note that it is possible to activate all e-constituents of a selective package using the **Update** button that is displayed in the top-right corner of the package list screen (when no filter is applied). For more information about working with the package list, see **e-Package List** on page 51.

Activating e-Constituents in Active Selective Packages

Once a selective package is active, its e-constituents can be activated in one of the following ways:

- by clicking the **Update** button in the top-right corner of the package list or in the basket
- by updating the **e-Product status** field in the constituent's e-product screen.
- in batch mode, using the Verde e-constituent loader.

For more information about updating e-constituents in the package list, see **e-Package List** on page 51. For more information on the e-constituent loader, see **e-Constituent Input Files** on page 327.

Table of e-Product Updates

Table 11. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Evaluation – update selection status to Evaluation	Standalone	No	N/A	
	Interface	No	N/A	
	Package – aggregator	No	N/A	Updates all e-constituents that are defined as dependent to **Evaluation** selection status.
	Package – selective	No	N/A	Must manually update all e-constituents to **Evaluation** selection status using the update function in the package list.

Table 11. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Review – assign a selection status of Review	Standalone	Yes	N/A	
	Interface	Yes	N/A	
	Constituent	Yes	N/A	
	Package – aggregator	Yes	N/A	Updates all e-constituents that are defined as dependent to **Review** selection status.
	Package – selective	Yes	N/A	Must manually update all e-constituents to **Review** selection status using the update function in the package list.
Approve – update selection status to Approved	Standalone	N/A	N/A	
	Interface	N/A	N/A	
	Constituent	N/A	N/A	

Table 11. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Final Approval – update package to Final Approval	Package – aggregator	N/A	N/A	Updates all e-constituents that are defined as dependent to **Final Approval**.
	Package – selective	No	N/A	Updates all e-constituents with a selection status **Approved** to **Final Approval**, and selection statuses **Evaluation** and **Review** to **Null**. Other selection statuses remain unchanged.
	Package – selective	Yes	Yes	**Approved:** Updates selection status to **Final Approval**. If not yet active, activate using the **Subscription start date**.
				Rejected: Assign an **Activation to date** using **Subscription end date**.
				Evaluation and Review: Null
				All others: No update
	Package – selective	Yes	No	**Approved:** Update selection status to **Final Approval**. If not active, activate using current date.
				Rejected: Assign an activation to date – use current date.
				All others: No change

Table 11. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Activate – make an e-product active by assigning an e-product status and an Activation from date	Standalone	No	Yes	Take the **Activation from date** from the **Subscription start date** of the active acquisition record. If the interface is not active, then activate.
			No	Use the current date as the **Activation from date** – can be overwritten. If the interface is not active, then activate.
	Interface	No	Yes	Take the **Activation from date** from the **Subscription start date** of the active acquisition record.
		No	No	Use the current date as the **Activation from date**.
	Constituent of selective package	No	Yes	Activate online by clicking the **update** button in the package list. Assign an e-product status and an **Activation from date**. If no **Activation from date** is assigned, takes the **Activation from date** from the **Subscription start date**.
	Package – aggregator	No	Yes	Updates all e-constituents that are defined as dependent. The e-constituents get the package e-product status and the package **Activation from date**. Takes the **Subscription start date** as the default **Activation from date**. If the interface is not active, then activate.
		No	No	Updates all e-constituents. The e-constituents get the package e-product status and the package **Activation from date**. Take the current date as the default **Activation from date**. If the interface is not active, then activate.

Table 11. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
	Package – selective	No	Yes	Updates all e-constituents that have a selection status of **Final Approval**. These e-constituents get the package e-product status and the package **Activation from date**. The package **Activation from date** is taken from the **Subscription start date**. If the interface is not active, then activate.
		No	No	Updates all e-constituents that have a selection status of **Final Approval**. These e-constituents get the package e-product status and the package **Activation from date**. The package **Activation from date** is taken from the current date. If the interface is not active, then activate.
Reject – update the selection status of an e-product to Rejected	Standalone	Yes	Yes	Uses the **Subscription end date** of the current acquisition record as the **Activation to date**. The default can be overwritten.
		Yes	No	Uses the current date as the **Activation to date**. The default can be overwritten.
		No	N/A	No action
	Interface	Yes	Yes	Uses the **Subscription end date** of the current acquisition record as the **Activation to date**. The default can be overwritten.
		Yes	No	Uses the current date as the **Activation to date**. The default can be overwritten.
		No	N/A	No action

Table 11. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
	Constituent of selective package	Yes	Yes	No action until package is approved or rejected.
	Package – aggregator	Yes	Yes	Uses the **Subscription end date** of the active acquisition record as the **Activation to date**. Updates the selection status and **Activation to date** of all e-constituents that are defined as dependent.

9

Acquisition Records

This section includes:

- About Acquisition Records on page 119
- Acquisition Records List on page 120
- Acquisition Details on page 122
- Acquisitions Tab on page 125
- Local Acquisitions Tab on page 131
- Invoice Tab on page 132
- Acquisition Processes on page 134

About Acquisition Records

Verde does not offer a fully configured acquisition system. The actual payment of money and fiscal transaction takes place in your ILS. Verde's acquisition and invoice data only reflects transactional activity that took place in the library's automated management system.

The acquisition record tracks the acquisition process for one or more e-products. It stores all of the information needed to order, renew, and cancel a subscription to these e-products. An e-product can be linked to only one active acquisition record per subscription period.

A separate acquisition record in Verde is required for each subscription period. Only the first acquisition record is created manually or loaded. All subsequent acquisition records are created by the system as part of the renewal process.

Typically, acquisition records are managed at the level of e-packages and e-standalone resources. However, it is also possible to create an acquisition record for an e-interface or e-constituent if it is acquired separately.

Local Acquisition Records

In Verde, there is a single active acquisition record per e-product or group of e-products. However, in many cases, the cost of an electronic resource needs to be divided among sub-units within the library. Local acquisition records are used to record such information. They provide information on how the cost is allocated between contributing libraries or sub-units.

A local acquisition record is linked to specific subscription periods (that is, it is linked to a specific acquisition record).

Invoice Records

The invoice record is used to store invoice information. Verde itself does not have an invoicing system, but it is possible to load invoices that are managed in other systems using the Acquisitions Data Loader, or enter the information online.

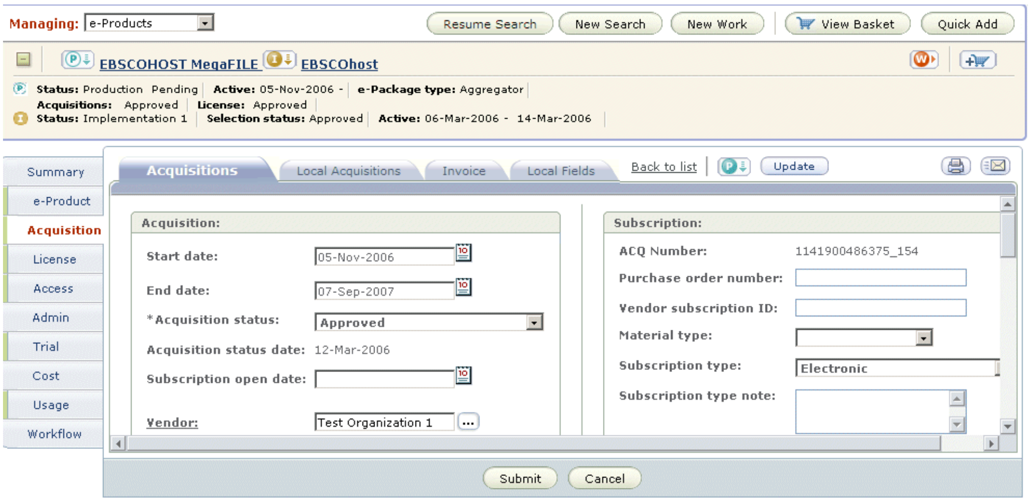

Figure 56: Acquisition Records

Acquisition Records List

The **Acquisition Records List** displays the list of acquisition records for a particular e-product. Verde has an acquisition record for each year that a subscription is active. Records display in reverse chronological order, such that the most recent record is displayed first. The Acquisition Record List displays acquisition records for the particular e-product and, if the e-product is an e-constituent record, it also displays acquisition records for the constituent's e-package. Acquisition records associated with a particular e-product can be edited from the list, while inherited records can be edited by clicking the inheritance icon that is displayed in the first column of the list.

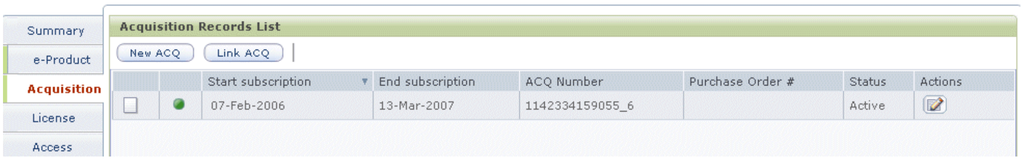

Figure 57: Acquisition Records List

The Acquisition Records List displays the following information for each record:

- whether the record is the parent record or the inherited record. An inherited record opens in edit or display mode, depending on your privileges.
- if the record is currently active. (The record must have the status **Active** or **Review**.)
- the subscription start and end dates. (The **Start Subscription** column is automatically sorted from latest to earliest.)
- the acquisition number
- The purchase order number
- The status of the acquisition record
- buttons to perform the following actions:
  - **Open Acquisition** – if you have editing privileges and the acquisition record is not inherited
  - **View Acquisition** – if the record is inherited and/or you do not have editing privileges

The following two function buttons display above the list of acquisition records:

- **New ACQ** – opens a new, blank acquisition form
- **Link ACQ** – links the e-product record to an existing acquisition record.

Click **Renew** to open the next year's record. More information about acquisition renewal is available in **Acquisition Processes** on page **134**.

If there is an active acquisition or renewal workflow, the **Workflow** button is displayed above the Acquisition Records List. Clicking the button opens the list of tasks for the workflow. For details on acquisition workflows, see **Acquisitions Workflow** on page **212**.

Acquisition Details

The acquisition record has a single tab, **Acquisitions**, that contains all of the fields for the acquisition record.

There are three additional tabs that display: one for **Local Acquisitions**, another for **Invoices**, and the third for **Local Fields**. Local acquisitions and invoices are linked to specific annual acquisition records. When an acquisition record is renewed, the system copies the local acquisition records and local fields, as well as the acquisition record. Invoice records are not copied, but display from all acquisition records that share the same acquisition number.

If a local acquisition record or invoice record does not already exist, one can be added from the **Local Acquisitions** or **Invoice** tab. For a full list of fields in each of these tabs, see **Acquisitions Tab** on page 125.

The **Local Fields** tab is populated only if local fields have been defined by the Verde administrator for acquisition records. Note that there is a separate Local Fields tab for each acquisition record, enabling you to define different local fields for each acquisition record.

Adding New Acquisition Records

To create new acquisition records, click **New ACQ** in the Acquisition Records List. Note that only users with editing privileges are able to create new acquisition records.

To renew an acquisition record, click **Renew**. The following year's acquisition record opens. (The **Renew** button is displayed in the Acquisitions tab when appropriate.) Note that there are separate permissions for renewing an acquisition record and assigning the status **Active** to an acquisition record.

Editing Acquisition Records

To edit an acquisition record, click the **Open Acquisition** button in the **Actions** column of the Acquisition Records List. The **Open Acquisition** button is displayed in the list only if you have editing privileges.

Package-level acquisition records can be edited only from the Acquisition Records List of the e-package record. In an e-constituent record, the e-package acquisition record can be viewed only.

You can access the acquisition record of an e-package by clicking the **Edit Inherited Record** button that is displayed in the first column of the Acquisition Records List. The e-package acquisition record can then be updated. In the illustation below, the Acquisition Records List displays an e-constituent-level record. The down arrow on the **Acquisition** tab in the left menu indicates that the acquisition record is inherited. The spectacle icon in the Actions column indicates that you can only view the record and not update it.

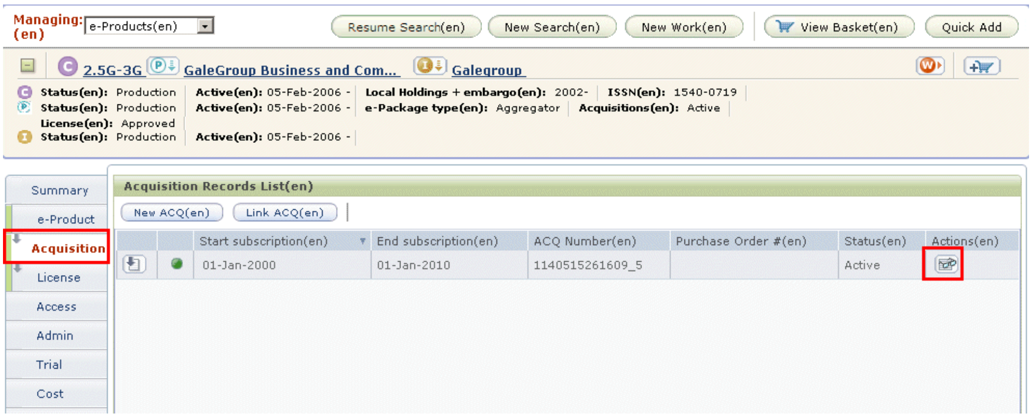

Figure 58: Editing Acquisition Records

Linking Acquisition Records

To link an e-product record to an existing acquisition record, click **Link ACQ**. This option should be used when multiple e-product records are acquired through a single subscription.

In such cases, you should first create a new acquisition record for one of the e-products, then click **Link ACQ** to link the remaining e-products to the existing acquisition record. Note that you do not have to link e-constituents to their e-package acquisition record. The system automatically links active e-constituents to their e-package acquisitions.

When you click **Link ACQ**, a pop-up window opens, enabling you to enter the acquisition number or purchase order number of the acquisition record to which you want to link your e product. If there are multiple acquisition records with the same acquisition number or purchase order number, ensure that you specify the appropriate year.

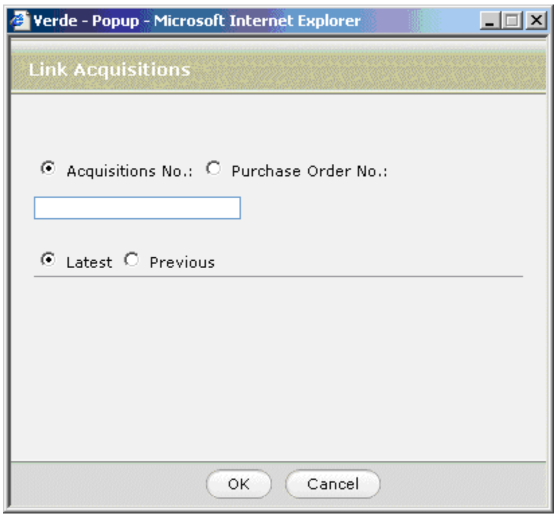

Figure 59: Link Acquisitions

When an acquisition record is connected to multiple e-products, you can open it for editing from the Acquisition Records List of each of the e-products to which it is connected. Once an acquisition record is linked to an e-product, the **Related** tab is displayed. This tab displays the e-product title, e-product status and selection status of each e-product that is connected to the acquisition record. You can navigate to an e-product by clicking the e-product name link.

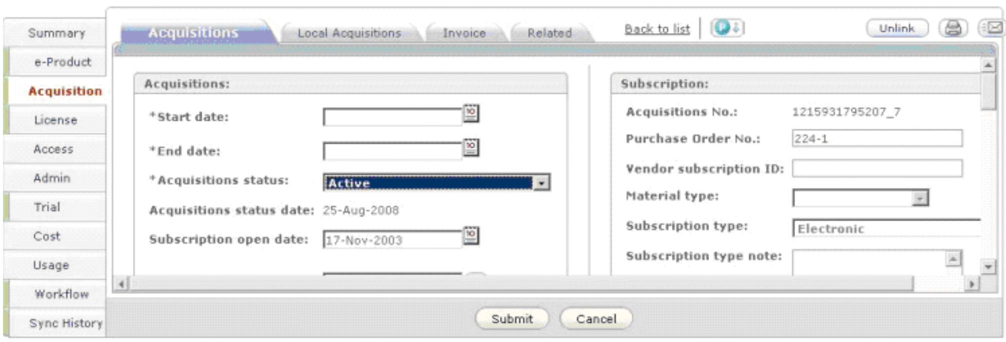

Figure 60: Acquisition Record – Related Tab

NOTE:

To detach an acquisition record, click the **Unlink** button. Acquisition records that are related to the active workflow cannot be unlinked. Only users with delete acquisition permissions can unlink acquisition records.

Deleting Acquisition Records

Acquisition records can be deleted only if:

- They have a status other than **Approved**, **Active**, **Cancelled**, **Renewed**, or **Send for additional processing**.
- They are not linked to an invoice or a local acquisition record.
- They are not related to a workflow.
- You have delete acquisition permissions.

If an acquisition record can be deleted, it can be deleted only from the Acquisitions tab, using the **Delete** button that is displayed above the acquisition details. The **Delete** button does not display if you do not have appropriate privileges or if the record cannot be deleted.

Printing and E-Mailing Acquisition Records

Individual acquisition records can be printed and e-mailed by clicking the **Print** or **E-Mail** buttons. These buttons appear above the acquisition record. The **Print** button prints all fields in the acquisition record that contain data, as well as all local acquisition and invoice records. Title information for all e-products acquired by the acquisition record is also included in the printout.

For information on configuring e-mail records, see **Configuring E-Mailing Records** on page 73.

Acquisitions Tab

The fields in the Acquisitions tab are divided into sections. The following table describes the fields within these sections.

Table 12. Acquisitions Tab Fields

Section	Field Name	Code	Description
Acquisitions	Start and end dates	SUBSCRIPTION STARTDATE SUBSCRIPTION ENDDATE	The start and end dates of the acquisition record are the start and end dates of the annual subscription. The **Subscription open date** contains the start date of the first subscription.

Table 12. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Acquisition status	ACQUISITION STATUS	The status of the acquisition record, controlled by a drop-down list. There are eleven possible statuses. New statuses cannot be added. (The statuses that appear in the list are defined in the Admin module.) Status codes are stored in the database and these cannot be changed. The display constant, however, can be changed in the Admin module. Standard setup provides the following statuses: ■ New ■ In Process 1, 2, 3 ■ Approved ■ Denied ■ Sent for Additional Processing ■ On Hold ■ Active ■ Renewed ■ Cancelled
	Acquisition status date	ACQUISITION STATUSDATE	The date that the acquisition status was assigned.
	Subscription open date	ORDERDATE	The date that the subscription was first opened. Corresponds only to the acquisition start date on new subscriptions.
	Vendor	VENDORCODE	The vendor for the subscription. Click to open the list of organizations. Any organization can be selected, though the organization you want is most likely to have the role **Vendor**. To view only vendors, select the role **Vendor** from the drop-down list and click **Submit**. Click the **Select Organization** button to select an organization. Once an organization has been selected, click the hyperlinked vendor to see a list of contacts for the vendor.

Table 12. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Vendor (continued)		**Note:** If the vendor is missing from the list of organizations, you can add the vendor by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.
	Budget	BUDGETS	The name of the budget or fund that is paying for the subscription.
Renewal/ cancellation	Advance notification period	SUBSCRIPTION NOTIFICATION	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record.
	Auto renewal	AUTORENEWAL	Controls renewal. Acquisition records that are marked for auto renewal are renewed by the Verde task **Subscription Renewal**.
	Advance notice date	ADVANCE NOTICEDATE	Calculated by the system based on the **Advance notification period** and the acquisition end date.
	Renewal/ cancellation date	RENEWCANC DATE	Date on which the acquisition record was renewed or cancelled.
	Renewal/ cancellation decision note	RENEWCANC DESCISION NOTE	The reason for canceling or renewing the subscription.
	Renewal/ cancellation note for ILS	RENEWCANC NOTEILS	Send/display in ILS
	Renewal/ cancellation note for vendor	RENEWCANC NOTEVENDOR	Sent to vendor
	Print cancellation restriction	PRINTCANCEL RESTRICTION	Contractual restrictions on canceling subscriptions for print versions of journals contained in the package.
	Print cancellation note	PRINTCANCEL NOTE	Note field. Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license.

Table 12. Acquisitions Tab Fields

Section	Field Name	Code	Description
Subscription	Acquisition number	ACQUISITION NUMBER	Unique number assigned by the system. The acquisition number can be shared by multiple acquisition records
	Purchase order number	PURCHASE ORDERNO	Pointer to an acquisition record in another system. If the purchase order number is an Aleph order number, the Aleph order can be displayed online.
	Vendor subscription ID	VENDOR SUBSCRIPTION CODE	Unique ID provided by the vendor
	Material type	MATERIALTYPE	Available types are: ■ Journal ■ A/I database ■ Article database ■ Database ■ e-Book
	Subscription type	SUBSCRIPTION TYPE	Available types are ■ Electronic ■ Print ■ Electronic & Print ■ Electronic & Print Surcharge ■ Print & Electronic Surcharge The display names can be modified in the Admin module.
	Subscription type note	SUBSCRIPTION TYPENOTE	Note field
	Note for ILS	NOTEFORILS	Note for ILS system
	Note for vendor	NOTEFOR VENDOR	Note to be included in correspondence with vendor.
Price and Payment	Final price	PRICE	Annual price of the subscription.

Table 12. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Method of acquisition	ACQUISITION METHOD	Drop-down list with the following options: ■ Purchase ■ Gift ■ Free ■ Exchange
	Discount on price	DISCOUNTON PRICE	Percentage discount negotiated with vendor.
	Pricing model	PRICINGMODEL	Note field. A description of the fee structure applicable to the product.
	Price cap	PRICINGCAP	Amount by which the price can rise. This is the maximum percentage of annual increase in a multi-year agreement.
	Price cap period from and to	PRICINGCAP FROM PRICINGCAPTO	Dates on which the price cap begins and ends.
	Price note	PRICENOTE	The note field that contains additional information regarding the subscription price.
	Inflation rate	INFLATIONRATE	Defined in percentage terms.
	Consortial agreement	CONSORTIAL AGREEMENT	Indicates whether an acquisition falls under a multi-party agreement that uses the same license for all parties.
	Pooled concurrent users	POOLED CONCURRENT USERS	The number of concurrent users if shared across a consortium, rather than within a specific institution. This number may be spread across one or more e-products.
	Concurrent users note	CONCURRENT USERSNOTE	Note field. Can be used for: ■ A specific explanation of how users are allocated or shared if pooled or platform-based. ■ Additional information about the number of concurrent users
	List price	LISTPRICE	Listed price

Table 12. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Net price	NETPRICE (from the SUBSCRIPTION PERIOD Oracle table)	Net price
	Currency	CURRENCY (from the SUBSCRIPTION PERIOD Oracle table)	Currency

New Acquisition Records

When an acquisition record is new, it is at the beginning of the acquisition process. There are no mandatory fields and any information added is saved. Sites that have set up interaction with Aleph can push new acquisition records to their Aleph database. This option is available for the following e-product types: e-package, e-standalone, and e-interface. For more information, refer to the *Verde-Aleph Interoperability Guide*.

Interim Acquisition Statuses

The following acquisition statuses all reflect stages in the local acquisition process:

- In Process 1-2
- Ready to be approved
- Approved
- Review
- Denied
- Sent for Additional Processing
- On Hold

You can change the names of statuses to better reflect your own, local processes. Changes to display names are made in the Admin module.

Active Acquisition Records

The statuses **Active** and **Review** both indicate that an acquisition record is in use. Both statuses have the following mandatory fields:

- Start and end date

- Acquisition status
- Vendor
- Auto-renewal
- Subscription type

Only acquisition records that are active are processed by the Verde tasks **Subscription Renewal** and **Subscription Review**.

Renewed Acquisition Records

The status **Renewed** is assigned to acquisition records for past years. These records are no longer active, but they were renewed, so an active acquisition record was created. The system automatically assigns the status **Renewed** to records when they are renewed using the **Renew** online or batch function.

Cancelled Acquisition Records

The status **Cancelled** is assigned manually to acquisition records that are to be cancelled. When acquisition records are cancelled, linked e-product records must be manually updated and an expiration date assigned to the e-product.

Local Acquisitions Tab

Local acquisition records can be added to acquisition records using the **Local Acquisitions** tab. The **Add Local ACQ** button does not display in this tab until a general acquisition record exists.

Local acquisition records can be deleted by clicking the **Delete** button that is displayed next to the local acquisition record. To delete local acquisition records, you must have delete privileges.

Records can be accessed and edited by clicking the **Expand All** button, or the + (plus) sign next to a specific record.

The following table describes the fields in the Local Acquisitions tab.

Table 13. Local Acquisitions Tab Fields

Field	Description
Institution	The institution paying for/ sharing the costs of the e-product
No. of concurrent users	The number of concurrent users
Concurrent users note	Note field

Table 13. Local Acquisitions Tab Fields

Field	Description
Cost share	The amount that the institution is paying for the e-product
Cost share percentage	The percentage amount that the institution is e paying for the e-product
Currency	Currency of the amount defined above
Cost share date	Date of the cost sharing
Cost share note	Note field
Budget	Information about the budget that covers the cost

Invoice Tab

Invoice records store information about invoices for the acquisition record. Invoices that are managed in other systems can be loaded into Verde using the Acquisitions Data Loader. The **ILS invoice ID** field in Verde stores the ID of the invoice in the external system and can be used for matching and updating invoice records.

Invoice records are linked to annual acquisition records. However, once they have been created, invoice records display on all acquisition records that share an acquisition number. In this way, it is possible to view invoice history.

NOTE:

An invoice record with a **Paid** status cannot be edited or or deleted. If you need to edit or delete this type of invoice, you can temporarily change the status to **Unpaid** or **Ready to be paid** and then edit/delete the record.

Creating New Invoice Records

To create a new invoice record, from the **Invoice** tab of the acquisition record, click **Add Invoice**. Invoices can be added to a new acquisition record only after the acquisition record has been submitted and saved to the server. You must have editing privileges to create new invoice records.

Editing Invoice Records

Records can be accessed and edited by clicking the + (plus) sign next to a specific record.

Deleting Invoice Records

To delete an invoice record, click the **Delete** button in the invoice summary line of the acquisition record's **Invoice** tab. You must have delete privileges to delete invoice records.

Invoice Tab Fields

The following table describes the fields in the Invoice tab.

Table 14. Invoice Tab Fields

Field	Description
Invoice date	A mandatory field. If no date is defined, it is not be possible to submit/update the record.
Invoice status	Possible options are: ■ Unpaid ■ Ready to be paid ■ Paid
Payment date	The date on which the payment is to be made.
Vendor	Enables you to browse to the list of organizations.
Invoice number	A mandatory field. If not defined, it is not possible to submit the record.
Line number	A mandatory field. If not defined, the default, 0, is used.
ILS invoice ID	The invoice ID number in the external ILS. This field is used to match and upload by the Verde loaders.
Budgets	The budgets associated with this invoice.
Object code	Object codes in the external ILS related to the budget.
From and to dates	The period that is being invoiced
Credit or debit + amount	Credit or debit amount
List price	The list price.
Net amount	The net amount of the order.
Total amount	The total amount of the order.

Table 14. Invoice Tab Fields

Field	Description
Currency	The currency used for the invoice.
VAT code	The value-added tax code.
VAT amount	The amount of value-added tax.
Number of units	The number of units being invoiced.
Note	Note field

Acquisition Processes

The acquisition process includes steps that are performed online as well as steps that are performed by or with the help of Verde tasks and reports. Note that acquisition processing and e-product selection are closely related and records are transferred between the two processes. The primary difference between the two processes is that selection is performed on individual e-products of all types, while acquisition processing occurs on the level of the acquisition record and affects sets of e-products. For more information about the selection process, see **About Selection Processes** on page **107**.

Getting Started

Acquisition records can be created in the following ways:

1. At the beginning of your implementation process, acquisition records can be created in batch mode by the SFX localization program. This program creates an acquisition record for every e-package and e-standalone that is activated. These records are activated in Verde because they are active in your site's SFX installation.
2. If you have Aleph, the acquisition conversion process enables you to take an input file from Aleph and convert it to a format that can be loaded to the Verde database. For details, see **Converting Acquisitions** on page **529** and **Loading Acquisitions** on page **530**.
3. It is possible to create multiple acquisition records using the acquisition loader. For details, see **Acquisition Input Files** on page **365**.
4. By clicking **New ACQ** in the Acquisition Records List. Note that a report of e-products that have been approved for purchase can be produced and used by acquisitions staff as the basis for the manual creation of acquisition records.

Processing Acquisition Records

Once an acquisition record has been created, it must be processed, approved, and made active. There is a Verde workflow for managing these steps. For more information on Verde workflows, see **Workflows** on page **199**.

Verde provides a number of different tools for acquisition record tracking and reporting. You can search and retrieve e-products by acquisition status online. You can also run a Verde report of e-products and acquisition records by acquisition status.

Renewing and Reviewing Acquisition Records

Once the acquisition record is active, there are a number of processes that support automatic renewal and/or review. The processes work off the **Advance notice date** of the acquisition record. This date is produced by subtracting the auto renew period from the acquisition end date.

Auto Renew

If an acquisition record is marked **Auto Renew**, the Verde task **Subscription renewal** automatically renews the acquisition record. When renewal occurs, a new acquisition record is opened with the status **Active** and the existing acquisition record is marked **Renewed**. All fields, except for **Final price**, **Inflation rate**, **List price**, **Net price**, and **Currency** fields, are copied from the acquisition record that was renewed. New local acquisition records are also created if they previously existed. A report of acquisition records that have been renewed is provided by the **Subscription renewal** task.

NOTE:

For information on the handling of start and end dates in renewed acquisitions, see the **Handling of Start and End Dates in Renewed Acquisitions** section below.

Manual Renewal

If an acquisition record is not marked **Auto Renew**, the Verde task **Subscriptions for review** produces a report of all acquisition records that need to be reviewed before they can be renewed. This task also updates the acquisition record and all e-product records acquired using this acquisition record and assign both the acquisition record and the purchased e-products a status of **Review**. Libraries that do not review e-product records annually as part of the acquisition renewal process should run the task with the **Update database** field set to **No**. The **Subscriptions for review** process initiates the renewal workflow if it is active.

NOTE:
For information on the handling of start and end dates in renewed acquisitions, see the **Handling of Start and End Dates in Renewed Acquisitions** section below.

Handling of Start and End Dates in Renewed Acquisitions

If the original acquisition is not annual, Verde assigns the day after the end date of the original acquisition as the start date of the renewed acquisition. It uses the number of acquisition days indicated in the original acquisition to determine the end date of the renewed acquisition. For example, if the original acquisition has a start date of March 1, 2009 and an end date of March 31, 2009, the renewed acquisition will have a start date of April 1, 2009 and an end date of May 1, 2009.

If the original acquisition is annual, Verde renews the acquisition for the same period of the following year. For example, if the original acquisition had a start date of January 1, 2009 and an end date of December 31, 2009, the renewed acquisition will have a start date of January 1, 2010 and an end date of December 31, 2010.

However, when an original acquisition's start or end date occurs in the February of a leap year, the renewed acquisition's start and end dates are handled as follows:

- If the end date of the original acquisition is February 28th and the acquisition is being renewed in a leap year, the end date of the renewed acquisition will be **February 28, 2008**.
  - Original acquisition:

    Start date = 1.3.2006

    End date = 28.2.2007
  - Renewed acquisition:

    Start date = 1.3.2007

    End date = **28.2.2008** (and not 29.2.2008)
- If the end date of the original acquisition is February 29th, the end date of the renewed acquisition will be **February 28th**.
  - Original acquisition:

    Start date = 1.3.2007

    End date = **29.2.2008**
  - Renewed acquisition:

    Start date = 1.3.2008

    End date = **28.2.2009**

- If the start date of the original acquisition is February 29th, the start date of the renewed acquisition will be **March 1st**.
  - Original acquisition:

    Start date = **29.2.2008**

    End date = 28.2.2009
  - Renewed acquisition:

    Start date = **1.3.2009**

    End date = 28.2.2010

e-Product Review

Libraries that do review the e-products should review all e-products that have a selection status of **Review**. These e-products are approved or rejected during the course of the review process. The Verde **Report e-product by selection status** report should be used to produce reports of e-products for review, as well as reports of e-products that have been rejected or approved. These reports are used by the acquisitions staff. Acquisition records for e-products that have been rejected must be cancelled, while the acquisition records for e-products that have been approved must be renewed. Note that both the renewal and the cancellation are manual.

Renewing or Canceling Acquisition Records

This is the final step in the renewal process. The decision to renew or cancel the acquisition record is usually based on the e-product selection status. In order to cancel an acquisition record, update the acquisition status to **Cancelled**. If you are working with Aleph, click the **Update** button to send a message to Aleph so that the Aleph order can be cancelled. Note that the update works only if an Aleph order number is entered in the **Purchase order number** field of the acquisition record.

To renew an acquisition record, click the **Renew** button in the Acquisitions tab. Note that this button appears only if the acquisition record's status is **Active** or **Review**. Acquisition records that are not active cannot be renewed. The renewal function creates a new annual acquisition record with the status **Active**, updates the existing acquisition record to **Renewed**, and extends the license. Only licenses that have been assigned the renewal type **Automatic** are extended. Licenses that are extended automatically are extended by the amount of time entered in the **Standard duration** field of the license. If there is no standard duration, the license is extended so that the license ends on the same date as the acquisition record.

10

License Records

This section includes:

- **About License Records** on page **139**
- **License Records List** on page **140**
- **License Details** on page **141**
- **License Record Tabs** on page **145**
- **Prevailing Term Records** on page **152**
- **License Processes** on page **153**

About License Records

A license is the legal contract between a library and a content or interface provider. It contains a legal description of the rights that have been purchased, the terms of use, and additional obligations of both parties. The Verde license record contains both structured and unstructured data fields. A license can be linked to one or more e-products and an e-product can be linked to one or more licenses.

If the e-product is linked to more than one license, it is necessary to create a **prevailing terms** record that stores the license terms that are in effect and governs the access of a particular e-product.

Typically, licenses are created for e-package and e-standalone resources. However, they may also be required for e-interfaces, where the interface is licensed separately (there may be a technology fee) and e-constituents, where the license would typically be a license rider for an individual journal that is part of a package.

License Records List

The **License Records List** displays a list of license and prevailing term records associated with a particular e-product. The License Records List includes records for the e-product itself, as well as any license and prevailing term records that are inherited from parent records.

Licenses and prevailing terms can be inherited on three levels:

- e-Constituents inherit licenses from their e-packages and e-interfaces.
- e-Standalones inherit licenses from their e-interfaces.
- e-Packages inherit licenses from their e-interfaces.

Figure 61: License Records List

The License Records List displays the following information for each record:

- whether the record is the parent record or the inherited record
- if the record is currently active
- the name of the license
- The start date and end date of the license. (The **Start Date** column can be sorted so that you can view the list of licenses from latest to earliest, or from earliest to latest.)
- the status of the license
- the license's type
- the license's ID
- buttons to perform the following actions:
  - edit the license, if you have editing privileges and the license record is not inherited
  - view the license, if the record is inherited and/or you do not have editing privileges
  - duplicate the license, which enables you to copy/paste the license record to the same e-product if you have editing privileges

NOTE:

> To edit an inherited license, click the **Open Inherited Record** button that is displayed in the first column of the License Records List. The parent license record opens.

Three function buttons appear above the list of license records:

- **New License** – creates a new license record.
- **Link License** – links the e-product to an existing license that it shares with another e-product.
- **New Prevailing Terms** – enables you to add a prevailing term record. This button is displayed only if there is an active license. (A license is considered active if it is of the status **Approved**.)

If there is an active license workflow for an e-product, the **Workflow** button is displayed above the License Records List. Clicking the button opens the list of tasks for the workflow. For details on license workflows, see **License Workflow** on page **206**.

License Details

The license and prevailing term records contain the following tabs:

- Description
- Terms
- Notes
- License Review
- Locations
- Users
- Local Fields

There are approximately 110 licensing fields. Sites can set default values for new licenses. Default values are set by local administrators in the Admin module.

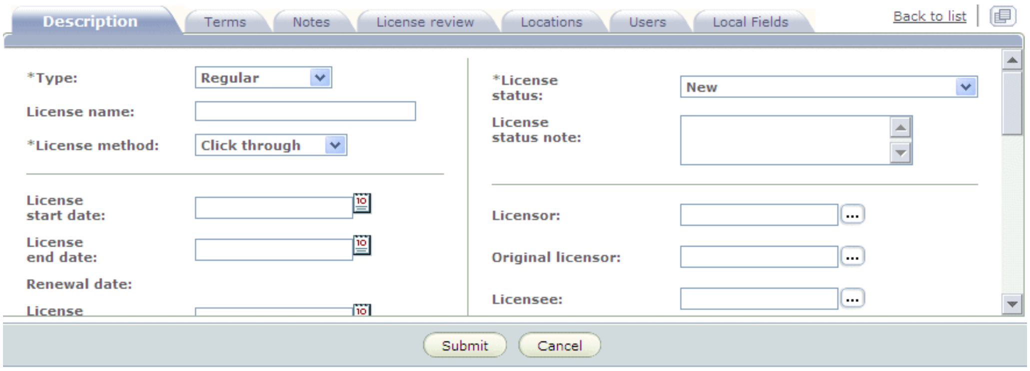

Figure 62: License Details

In the license detail tabs, the following actions are possible:

- return to the License Records List
- print the license details
- e-mail the license details
- copy the license
- paste the license

In the **Description** tab, you can add an external license file in any format. Note that there are permissions for viewing, creating, and deleting license attachments.

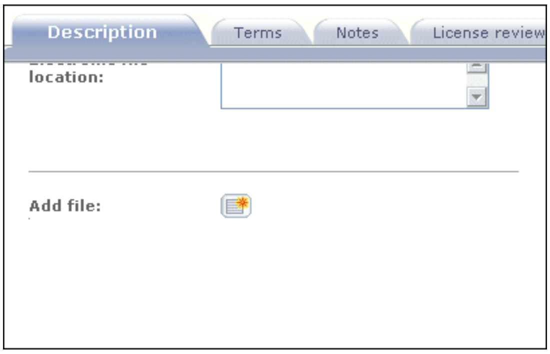

Figure 63: Adding an External License File

Adding and Editing Licenses

To create a new license record, from the License Records List, click **New License**. Note that you must have both creating and editing privileges to create new licenses.

Once an e-product has been linked to an existing license (see for details), the license is displayed and is editable from the e-product's License Records List. To edit a license, from the Actions column of the License Records List, click the **Open License** button. This button is displayed only if you have editing privileges and if the license is editable.

Package-level license records can be edited only from the License Records List of the e-package record. In an e-constituent record, the e-package licsense record can be viewed only.

You can access the license record of an e-package by clicking the **Edit Inherited Record** button that is displayed in the first column of the License Records List. The e-package license record can then be updated. In the illustration below, the License Records List displays an e-constituent-level record. The down arrow on the **License** tab in the left menu indicates that the license record is inherited. The spectacle icon in the Actions column indicates that you can only view the record and not update it.

Figure 64: Editing License Records

NOTE:
Separate permissions are required for approving and extending licenses.

Linking Licenses

To link an e-product record to an existing license record, click **Link License**. This option should be used when multiple e-product records are acquired through a single license.

In such cases, you should first create a new license record for one of the e-products, then click **Link License** to link the remaining e-products to the existing license record. When you click **Link License**, a pop-up window opens, enabling you to enter the license code or license name of the license record to which you want to link your e product.

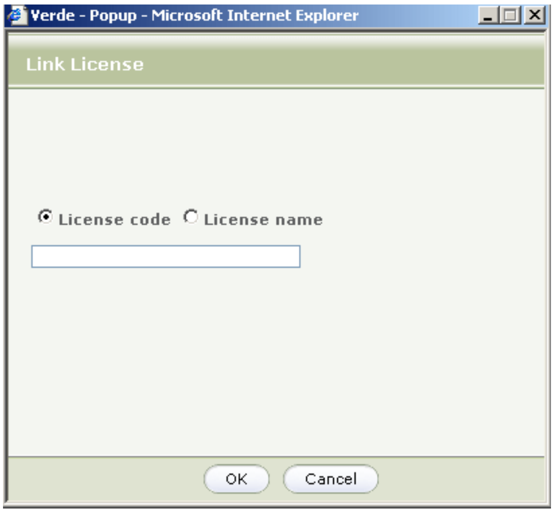

Figure 65: Link License

When a license record is connected to multiple e-products, you can open it for editing from the License Records List of each of the e-products to which it is connected. Once a license record is linked to an e-product, the **Related** tab is displayed. This tab displays the e-product title, e-product status and selection status of each e-product that is connected to the license record. You can navigate to an e-product by clicking the e-product name link.

Figure 66: License Record – Related Tab

NOTE:

To detach a license record, click the **Unlink** button. License records that are related to the active workflow cannot be unlinked. Only users with delete license permissions can unlink license records.

Duplicating Licenses

The **Duplicate License** button is available in the License Records List's Actions column. All licenses and prevailing term records can be duplicated for the same e-product. When licenses are duplicated, all fields except the license start and end date and license status are copied. Note that you must have editing privileges to be able to duplicate licenses. See **Copying and Pasting e-Product Data** on page **65** for more information about duplicating license information from one e-product to another.

Deleting Licenses

Licenses can be deleted only before they have been approved. Once a license has been assigned a status of **Approved** or **Retired**, it cannot be deleted. You can delete licenses only from the parent-level record and only if you have delete privileges. Licenses that have been inherited or licenses that are related to a workflow cannot be deleted. To delete a license that can be deleted, click the **Delete** button in the license details screen.

Printing and E-Mailing License Records

The **Print** and **E-Mail** buttons appear in the license details screen. When a license is printed, the printout includes all fields that contain data. In addition, the following items are included in the printout:

- license terms
- license notes
- license reviews

The titles of all e-products that are covered by the license are also included in the printout.

For information on configuring e-mail records, see **Configuring E-Mailing Records** on page **73**.

License Record Tabs

License records are considered active when they have the status **Approved**. The status of the license determines the list of mandatory fields.

- When a license is new, there are no mandatory fields.
- When a license is **Active** or **Retired**, the following are mandatory:
    - Licensee
    - Licensor
    - Start and end dates
    - Vendor advance notification
    - Renewal type

NOTE:
The end date is not mandatory for perpetual renewal licenses.

Description Tab

The following table describes the fields in the license record's **Description** tab.

Table 15. Description Tab Fields

Field Name	Code	Description
License type	TYPECODE	Type of license. Once this field is defined, it cannot be modified. The following types are available: ■ Regular ■ Trial ■ Supplemental
License name	LICENSENAME	Unique name for the license.
License method	METHODCODE	License method. The following options are available: ■ Negotiated ■ Click Through ■ Online ■ Manifest Assent ■ Shrink-Wrap
License start and end dates	STARTDATE ENDDATE	Date on which the license becomes/ceases to be active.
Date renewed	RENEWAL DATE	Date on which the license was renewed.
License execution date	EXECUTION DATE	Date on which the license was executed.
Standard duration	LICENSE DURATION LICENSE DURATIONVAL	Used when licenses are renewed. Can be defined in weeks, months, or years.
Vendor advance notice	VENDOR ADVANCED NOTICE	Amount of time before the license expires that you need to cancel your subscription. Can be defined in days, weeks, or months.

Table 15. Description Tab Fields

Field Name	Code	Description
Renewal type	RENEWALTYPE CODE	Controls how the license is renewed. Possible values are: ■ Automatic ■ Explicit ■ Perpetual
License URI	LICENSEURI	Link to electronic version of license.
License URI type	LICENSEURI TYPE	Link type. Possible values are: ■ Empty ■ URI ■ URN ■ URL ■ Type 1 ■ Type 2 ■ Type 3
Physical license location	PHYSICAL LOCATION	Note field.
Electronic file location	FILELOCATION	Pointer to file location.
Auto-renewal cancellation period	NONRENEWAL NOTICEPERIOD NONRENEWAL NOTICECODE	The amount of advance notice required prior to license renewal if the licensee does not want to renew the subscription. The time interval in which the **Non-renewal notice period** is measured. Default values are: **Days**, **Weeks**, and **Months**. Thes values can be customized using the code table.
Add file	ATTACHMENT NAME	Option to link to an electronic version of the license agreement.
License status	STATUSCODE	Status of the license.
License status note	STATUSNOTE	Note field.

Table 15. Description Tab Fields

Field Name	Code	Description
Licensor	LICENSOR	The organization granting the license. **Note:** To open the list of organizations, click the **Browse** button. Although you can select any organization from this list, it is likely that you will want to select an organization with the role of **Licensor**. (To view only licensors, select the **Licensor** role from the drop-down list and click **Submit**.) Click the **Open Organization** button next to an organization to select it. Once an organization has been selected and the license record has been submitted, click the hyperlinked licensor to view a list of contacts for the organization. If a licensor is missing from the list of organizations, you add the licensor to the list by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.
Original licensor	ORIGINAL LICENSOR	The original organization granting the license. (See the note for the previous field name.)
Licensee	LICENSEE	The library licensing the e-product.
Licensing agent	LICENSING AGENT	The organization licensing the e-product. **Note:** To open the list of organizations, click the **Browse** button. Although you can select any organization from this list, it is likely that you will want to select an organization with the role of **Licensing Agent**. (To view only licensing agents, select the **Licensing Agent** role from the drop-down list and click **Submit**.) Click the **Open Organization** button next to an organization to select it. Once an organization has been selected and the license record has been submitted, click the hyperlinked licensing agent to view a list of contacts for the organization. If a licensing agent is missing from the list of organizations, you add the licensing agent to the list by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.

Table 15. Description Tab Fields

Field Name	Code	Description
Local licensing negotiator	LOCAL LICENSING NEGOTIATOR	The library contact responsible for negotiating the license.
License delivery requirements	DELIVERY REQUIREMENTS	The required medium in which official communications must be delivered.
Licensing note	LICENSING NOTE	Note field.
Public note	PUBLICNOTE	Note field.
License replaced by	REPLACEDBY	License code of later license.
License replaces	REPLACES	License code of earlier license.
License history note	LINKEDLICENSE NOTE	Note field.
License code	LICENSECODE	Automatically generated by Verde.
Creation date	CREATEDDATE	The date on which the record was created. Automatically generated by Verde.
Created by	CREATEDBY	Verde user.
Latest update	UPDATEDATE	The date on which the record was updated. Automatically generated by Verde.
Latest update by	UPDATEDBY	Verde user.

Notes Tab

The **Notes** tab stores license use notes for a given license or prevailing terms. There are two types of notes:

- Public
- Internal

Local notes can be added and edited by users with editing privileges. Notes can be deleted by users with delete privileges. The **Delete** button is displayed at the head of the record if the record is expanded, or in the summary line if the record is collapsed.

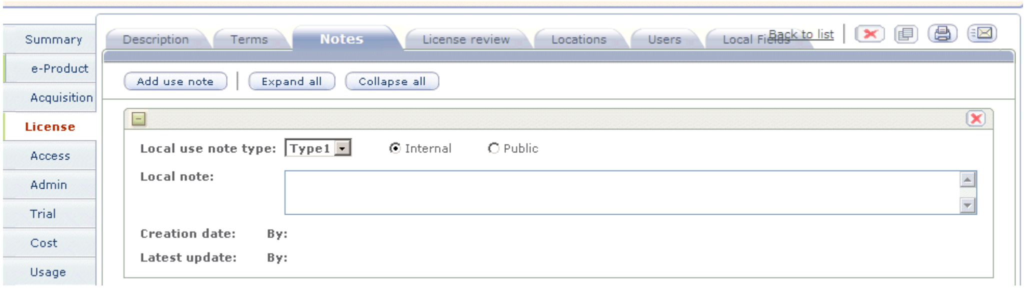

Figure 67: License Notes

License Review Tab

The **License Review** tab stores notes added by license reviewers. Note the + (plus) sign to the left of the one-line summary. When clicked, the entire license review opens. In this way, library evaluators' reviews and opinions can be stored in a single location.

The following fields are available in the license review record:

- Reviewer
- Review date
- Note field

Users with editing privileges can create and edit license reviews. Reviews can be deleted by users with delete privileges. The **Delete** button is displayed at the head of the record if the record is expanded, or in the summary line if the record is collapsed.

Locations Tab

The **Locations** tab allows the library to record information about sub-units for which the e-resource is licensed. A check box indicates whether the e-resource is licensed for the sub-unit.

The location record lists the valid institutions for the instance. When you click a line, an **Edit** button is automatically added to the line. This button opens the Allowed Location Note window, in which you can create and edit allowed location records if you have editing privileges.

When new licenses are created, the system uses the **Allowed locations** from the library record as the default allowed institutions. However, these values can be overwritten when the license is edited.

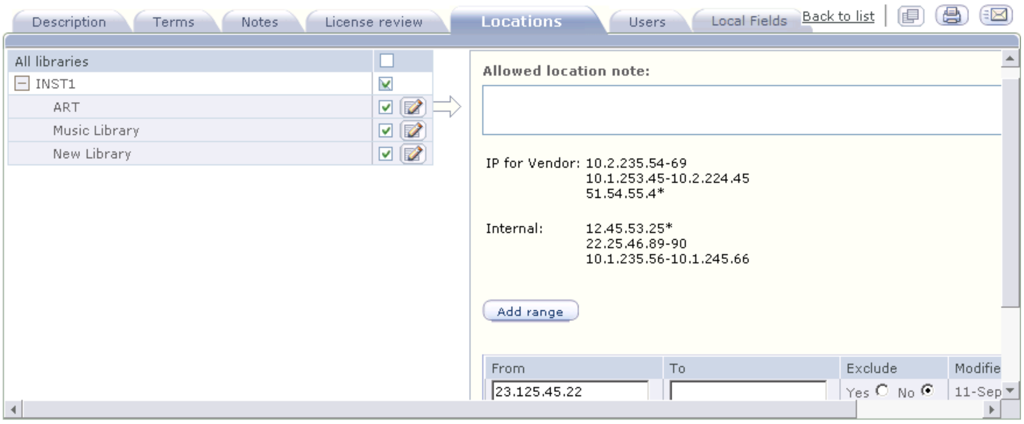

Figure 68: Locations

The IP for the library's vendor and internal IP are displayed in the **Allowed location note** box in read-only mode. Additional IPs can be added to the license using the **Add Range** button. These ranges can either be added to, or excluded from, the default IP ranges that are set in the library record using the **Yes/No** buttons in the **Exclude** column. The format of the IP range in the license is the same as its format in the library record.

Users Tab

The **Users** tab stores a site-defined list of user types. The list of user types is maintained by the local administrator in the Verde Admin module. The allowed user tables store the list of licensed user groups per e-resource. Each user group can be set to **Allowed** or **Not Allowed**. Users with editing privileges can create and edit allowed user records.

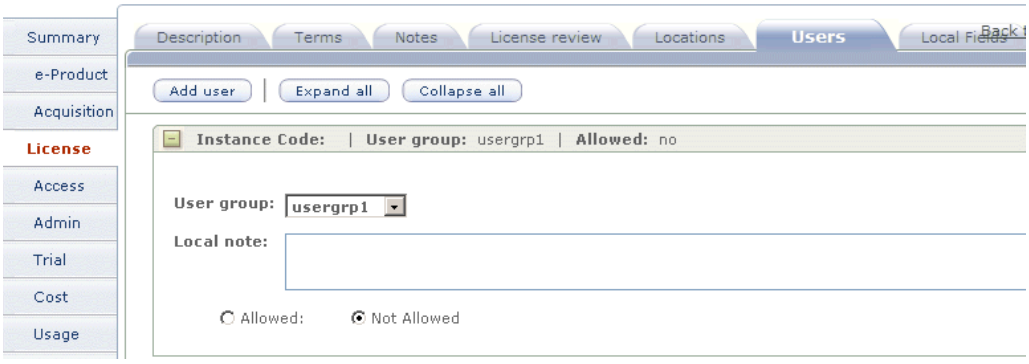

Figure 69: Users

Local Fields Tab

The **Local Fields** tab is populated only if local fields have been defined by the Verde administrator for license records.

A separate Local Fields tab is displayed for each license record, enabling you to define different local fields for each license record.

Prevailing Term Records

A prevailing term record must be defined when there is more than one active license—direct or inherited—for an e-product.

Where there is more than one active license record (that is, licenses with overlapping time frames) for an e-product, an error message and an **Add Prevailing Terms** button are displayed in the License Records List.

Figure 70: Prevailing Term Records

A prevailing term record must then be defined (by clicking the **Add Prevailing Terms** button) in order to store the license terms that govern the e-product.

Prevailing term records have the same fields as license records, however the following differences exist:

- The license type is automatically defined as **Prevailing**.
- There are only two statuses: **Active** and **Inactive**

Figure 71: Prevailing Terms – Status

NOTE:
Only users with editing privileges can create prevailing term records.

License Processes

A Verde workflow for licensing is initiated when a trial has ended with the decision to purchase. See **License Workflow** on page **206** for more information.

In addition, licenses can be managed using a combination of online and batch processes. The process for adding new licenses, as well as negotiating and approving them, is manual. The **Report of Active e-Products without Licenses** can be used to create a report of active e-products without licenses. The **General Report of e-Products** can be used to create a report of licenses with a particular statuses. In addition, you can locate e-products with a particular license status using the online search.

The **License renewal** type controls the manner in which licenses are renewed. The following rules govern license renewal:

- **Perpetual** licenses do not need to be renewed.
- **Automatic** licenses are renewed automatically when the acquisition record for the e-product is renewed.
- **Explicit Renewal** licenses must be renewed by clicking the **Renew** button. The **Renew** button is displayed above the license details when a license is renewable. Renewing a license extends the license end date by the license standard duration.

The Verde **License Renewal** task renews licenses that are about to expire. It also creates a report of licenses that have to be renewed explicitly and are up for renewal.

11

Access Records

This section includes:

- About Access Records on page 155
- Access Records List on page 155
- Access Details on page 156

About Access Records

Access records store information that is needed to access the electronic resource. This information includes access requirements, URLs, user names, and passwords.

Typically, access records are created for e-packages and e-standalones. However, it is also possible to create access records for e-interfaces and e-constituents.

Four types of access records can be defined:

- Web interface
- Z39.50
- XML
- SRW/SRU

Access Records List

The **Access Records List** contains a list of access protocols and links to the access record for each protocol. The icon in the first column indicates whether an access record exists for the e-product. An e-product can have only one access record for each access type. If an access record does not exist for an e-product, access information is inherited from the parent e-product. Only protocol information applicable to the e-product is included in the access record.

There are three functions available from the Access Records List, you have the appropriate user privileges:

- Create new
- Edit
- Duplicate

The buttons for each function display only when relevant. If an access record does not exist, the **Create New** button is displayed. If a record does exist, the **Edit** and **Duplicate** buttons display. In addition, sets of access records can be copied and pasted between e-products and between instances. The **Copy** button is displayed above the Access Records List. Once there is an access record on the clipboard, the **Paste** button is displayed.

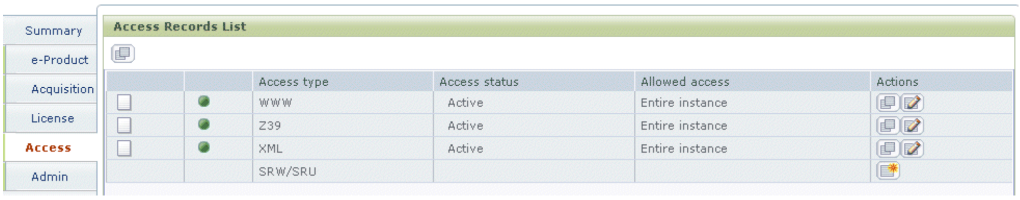

Figure 72: Access Records List

The Access Records List displays the following information for each record:

- whether the record is the parent record or the inherited record
- if the record is currently active
- the record's type
- the record's status
- whether or not the record is applicable to the entire instance
- buttons to perform the following actions:
  - create a new record
  - edit an existing record
  - duplicate a record

Access Details

The access record has three tabs: one containing general access information, a second containing access authorization details, and a third containing local fields.

General Access Information

In the **Data** tab, there are a number of URI fields that contain links. These fields are:

- For the WWW access type: **Primary access URI**, **Alternate URI**, **Local Persistent URI**
- For the SRW/ SRU access type: **Base URL**

After you click the **Submit** button, these fields became editable. Click the **Edit** button to edit these fields.

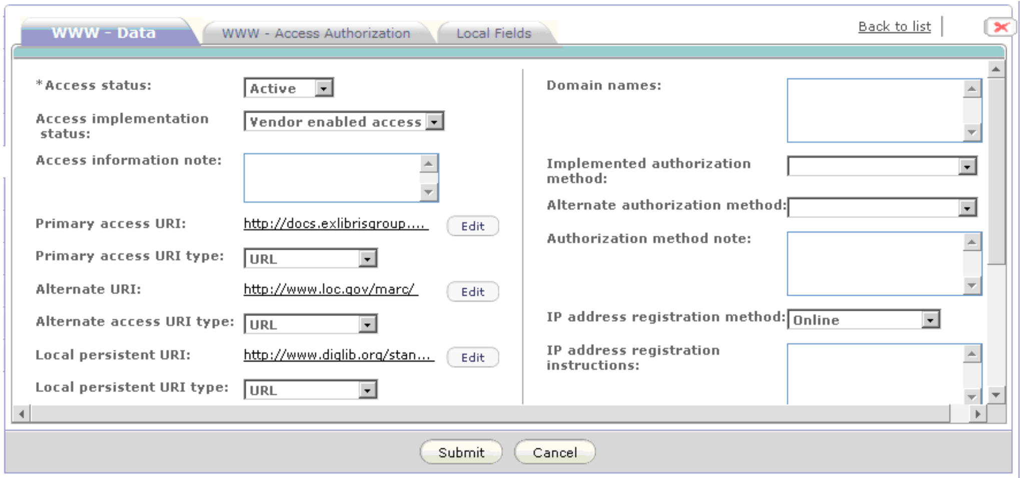

Figure 73: Access Details – Editing Links

List of Data Tab Fields

The following table describes the fields in the access record's **Data** tab.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Access status	ACCESSSTATUS	All	Access status. The possible values are: **Active**, **Inactive**, and **Test**. These fields can be customized by modifying the code table.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Access implementation status	WWW_ IMPLEMENTATION STATUS	WWW	Access implementation status. The possible values are: ■ Vendor-enabled access ■ Proxy URL created ■ Synced in SFX ■ Cataloged in OPAC ■ Status 1 ■ Status 2 ■ Status 3 These fields can be customized by modifying the code table.
Access information note	ACCESSINFONOTE	All	Additional information pertaining to access issues and unusual situations, such as inaccessible or non-subscribed portions not marked as such at the site, unusual login/logoff requirements, local vs. remote authentication control, and navigation or accessibility features.
Domain names	DOMAINNAMES	All	Any domain names associated with a given product. Some proxy servers require this information.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Implemented authorization method	IMPLAUTMETHOD	All	The method by which access to the product is controlled. If the provider supports more than one access method, this element records the methods selected for use by the subscribing institution. The possible values are: ■ IP address ■ Password ■ IP address+ password ■ Script ■ Certificate ■ Unrestricted ■ Other ■ Method 1 ■ Method 2 ■ Method 3 These fields can be customized by modifying the code table.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Alternate authorization method	ALTERNATE AUTMETHOD	All	Additional authorization methods available for the product. The possible values are: ■ IP address ■ Password ■ IP address+ password ■ Script ■ Certificate ■ Unrestricted ■ Other ■ Method 1 ■ Method 2 ■ Method 3 These fields can be customized by modifying the code table.
Authorization method note	AUTMETHODNOTE	All	Additional information pertaining to the authorization method.
IP address registration method	IPADDRESS REGMETHOD	All	The method by which IP addresses are sent to the product provider. The possible values are: ■ Online ■ Provider ■ Method 1 ■ Method 2 ■ Method 3 These fields can be customized by modifying the code table.
IP address registration instructions	IPADDRESSREG INSTRUCTION	All	The URI at which IP addresses are registered, the email address or contact role to which updates are sent, or other relevant instructions.
IP address general note	IPADDRESS GENERALNOTE	All	Additional notes pertaining to IP address information.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Access record ID	ACCESSCODE	All	The access code.
Creation date	CREATIONDATE	All	The date on which the access record was created.
By	CREATEDBY	All	Verde user. Contains the ID of the staff person who created the admin record.
Latest update	UPDATEDATE	All	The date on which the access record was updated.
By	UPDATEDBY	All	Verde user. Contains the ID of the staff person who created the admin record.
Primary access URI	WWW_PRIMARY ACCESSURI	WWW	The method of access, the location, and the file name of an e-product.
Primary access URI type	WWW_PRIMARY ACCESSURITYPE	WWW	The type of URI being used to locate and identify the product. The possible values are: ■ URL ■ URN ■ Undetermined ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized by modifying the code table.
Alternate URI	WWW_ ALTERNATEURI	WWW	An alternate URI available for access to an identical or alternate version of the resource. To be used when the primary URI is compromised or unavailable. Examples include URLs for mirror sites, URLs that provide access to a resource via a different provider, and so forth.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Alternate access URI type	WWW_ALTERNATE URITYPE	WWW	The type of alternate URI being used. The possible values are: ■ URL ■ URN ■ Undetermined ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized by modifying the code table.
Local persistent URI	WWW_LOC PERSISTENTURI	WWW	A persistent URI that is created locally to access the product.
Local persistent URI type	WWW_LOC PERSISTENT URITYPE	WWW	The type of locally created URI. The possible values are: ■ URL ■ URN ■ Undetermined ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized by modifying the code table.
Persistent name	WWW_PERSISTENT NAME	WWW	Persistent name.
Access check performed	WWW_CHECK PERFORMED	WWW	Indicates whether an access check was performed.
Check performed on	WWW_CHECK DATE	WWW	The date on which an access check was performed.
Z39.50 address	Z39_ADDRESS	Z39	Address used to provide Z39.50 access.
Z39.50 port	Z39_PORT	Z39	Port used to provide Z39.50 access.
Z39.50 version supported	Z39_VERSION SUPPORTED	Z39	Z39.50 version supported.

Table 16. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Z39.50 use attributes	Z39_ATTRIBUTES	Z39	Attributes necessary to activate Z39.50 access.
Z39.50 information from vendor	Z39_URLINFO	Z39	Z39.50 information from vendor.
Z39.50 database name – long	Z39_Z39DB LONGNAME	Z39	Long database name necessary to enable Z39.50 access.
Z39.50 database name – short	Z39_Z39DB SHORTNAME	Z39	Short database name necessary to enable Z39.50 access.
Z39.50 note	Z39_NOTE	Z39	Additional information about Z39.5 access.
Base URL	XML_BASEURL	XML	Base URL.
XML port	XML_PORT	XML	XML port.
Link to DTD	XML_SRW_ LINKTODTD	XML, SRW/ SRU	Link to DTD.
DTD note	XML_SRW_ DTDNOTE	XML, SRW/ SRU	DTD note.
URL to XML information from vendor	XML_SRW_ URLINFO	XML, SRW/ SRU	URL to XML information from vendor.
XML gateway note	XML_NOTE	XML	XML gateway note.
SRW/SRU	SRW_SRWSRU	SRW/SRU	There are two possible values: **SRW** and **SRU**.
Base URL	SRW_BASEURL	SRW/SRU	Base URL.
SRW/SRU port	SRW_PORT	SRW/SRU	SRW/SRU port.
SRW/SRU version supported	SRW_VERSION SUPPORTED	SRW/SRU	SRW/SRU version supported.
SRW/SRU attributes	SRW_ATTRIBUTES	SRW/SRU	SRW/SRU attributes.
SRW/SRU note	NOTE	SRW/SRU	Additional information about SRW/SRU access.

Tracking Access Provision to e-Products

You can track access provision to an e-product using the **Access implementation status** field. The field is relevant only for the WWW access type. For a list of the field's default values, see Table 16. Note that these values may be customized in the code table.

When the **Access implementation status** field is modified, Verde prompts you to send an e-mail. The E-Mail pop-up window contains three sections: **Mail Recipients**, **Sending Details**, and **Mail Body**.

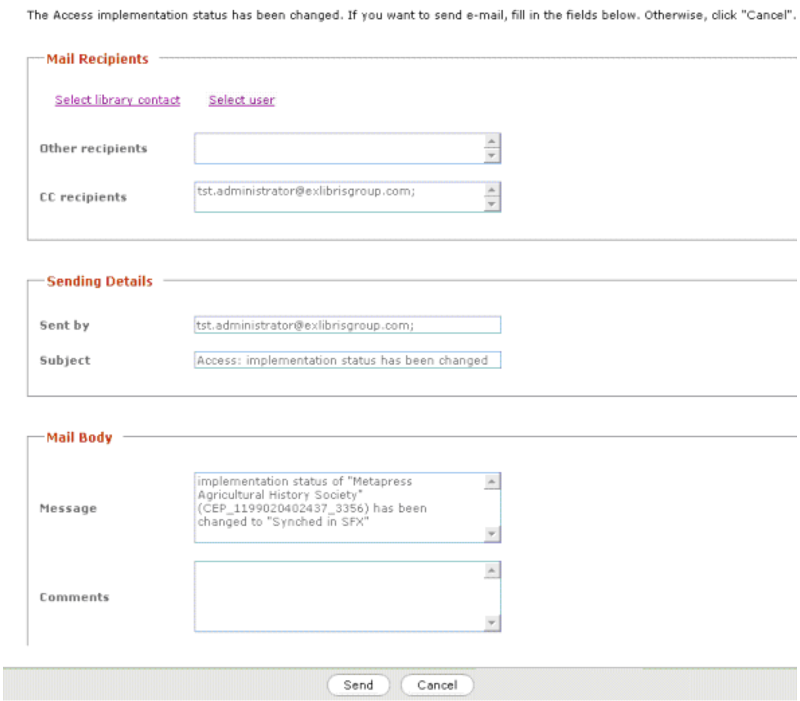

Figure 74: Send E-Mail

To send an e-mail:

1 Select e-mail recipients by clicking **Select library contact** or **Select user**. Alternatively, you can enter e-mail addresses in the **Other recipients** box.

NOTE:
The e-mail is automatically sent (CC) to the current Verde user. To change this, edit the e-mail address in the **CC Recipients** box.

2 If required, edit the default mail subject and message that appear in the **Sending Details** and **Mail Body** sections, respectively.

NOTE:
If you want to change the subject and message for all e-mails, contact your Implementation or Support representative.

3 Enter additional information in the **Comments** box.

4 Click **Send** to send the e-mail.

Access Authorization

The **Access Authorization** tab allows the library to record information about the sub-units to which the e-resource has access. If a sub-unit's check box is selected, the e-resource is available for the sub-unit.

The access authorization record lists the valid institutes for the instance. When you select an institute, an **Edit** button  is displayed for the institute. Clicking this button opens the access authorization pop-up window, in which you can create and edit access authorization records if you have editing privileges.

When new access records are created, the system uses the access authorization values from the library record as the default access authorization values. These default values can be overwritten when the access authorization record is edited.

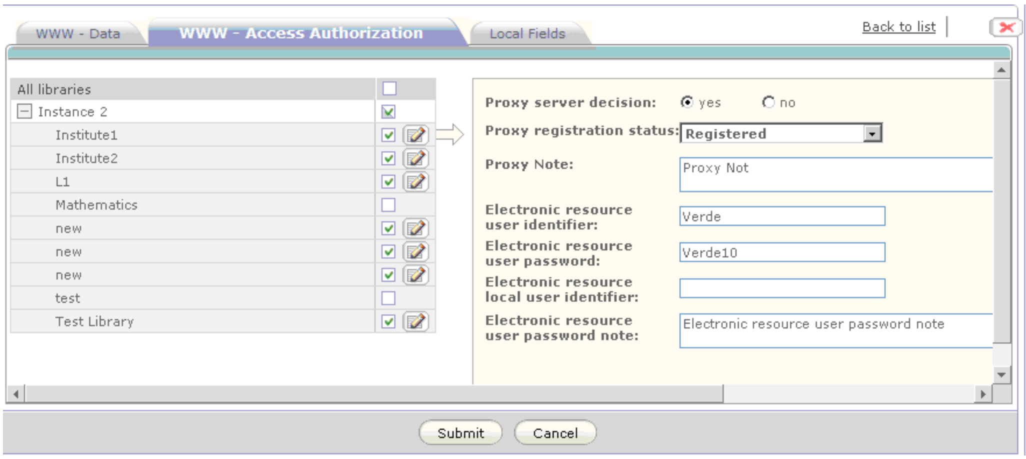

Figure 75: Access Authorization

Local Fields Tab

The **Local Fields** tab is populated only if local fields have been defined by the Verde administrator for access records. A separate Local Fields tab is displayed for each access type, enabling you to define different local field values for each access type.

12

Admin Records

This section includes:

- About Admin Records on page 167
- Admin Records List on page 167
- Admin Details on page 168

About Admin Records

The administrative record stores information about the tools provided by the electronic resource to administer an e-product. The administrative record also stores the user name and password information that is needed to access an e-product's administration module.

Typically, administrative records are created for e-interfaces, as the information is usually common for all e-products available from the e-interface. However, they can be created at any level.

Admin Records List

The **Admin Records List** displays the admin record for a particular e-product. If there is no admin record for an e-product, the e-product's parent admin record is inherited. An admin record can be inherited from any level, e-package or e-interface. Typically, admin records are maintained on the level of the e-package or e-interface. The **New Admin** button is displayed at the top of the list if no admin record exists; if a record does exist, this button does not display. The **Open Admin** button is displayed in the **Actions** column.

The Admin Records List displays the following information for each record:

- whether the record is the parent record  or the inherited record 

- if the record is currently active
- the code of the admin record
- the level of the e-product type for which the record exists
- a button in the Actions column that enables you to edit the record, if you have editing privileges and the record is not inherited

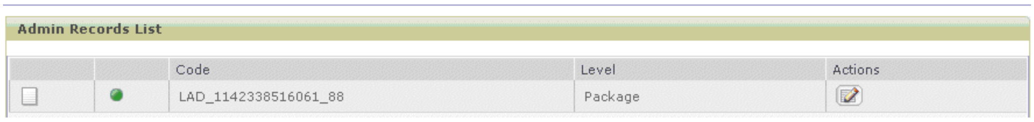

Figure 76: Admin Records List

Admin Details

The admin record contains five tabs:

- **Admin** – For details, see **Admin Tab** on page **169**.
- **Local Admin** – For details, see **Local Admin Tab** on page **175**.
- **Incidents** – For details, see **Incidents Tab** on page **176**.
- **Breaches** – For details, see **Breaches Tab** on page **178**.
- **Local Fields** – The **Local Fields** tab is populated only if local fields have been defined by the Verde administrator for admin records.

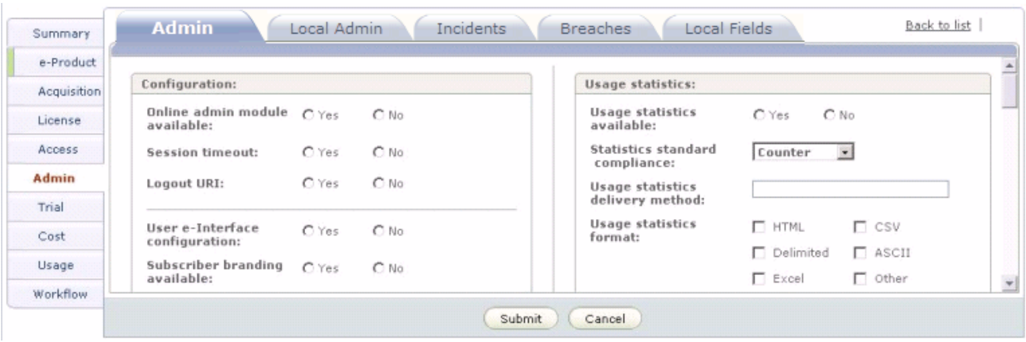

Figure 77: Admin Details

To the right of the tabs, the following four buttons are available:

- **Delete** – Enables you to delete the record, if you have the required permissions.
- **Copy e-Product Admin** – Enables you to copy the record.
- **Print** – Enables you to print the record.
- **Send E-Mail** –Enables you to send the record via e-mail.

NOTE:

There are no mandatory fields in the admin record. You may define field values as required.
Each **Note** field is 500 characters long.

Admin Tab

The **Admin** tab consists of three sub-sections:

- **Configuration** – This section covers all aspects related to configuration, such as user interface configuration, branding, and Z39.50 support.

  Note the following:

  - If you select **Yes** for **Online admin module available**, an additional field is displayed, enabling you to input the admin URI.
  - If you select **Yes** for **Session timeout**, a box opens, enabling you to enter the timeout value (in minutes).
  - If you select **Yes** for **Logout URI**, an additional field is displayed, enabling you to enter the logout URI value.
- **Usage statistics** – This section contains fields describing elements related to usage statistics, such as availability, frequency, and format.
- **Support** – This section lists all the fields pertaining to support, such as hard and software requirements, training information, and user documentation.

  There are three URI fields that contain links:

  - **Admin URI**
  - **Logout URI value**
  - **Provider system status URI**

  After you click the **Submit** button, these fields became editable. Click the **Edit** button to edit these fields.

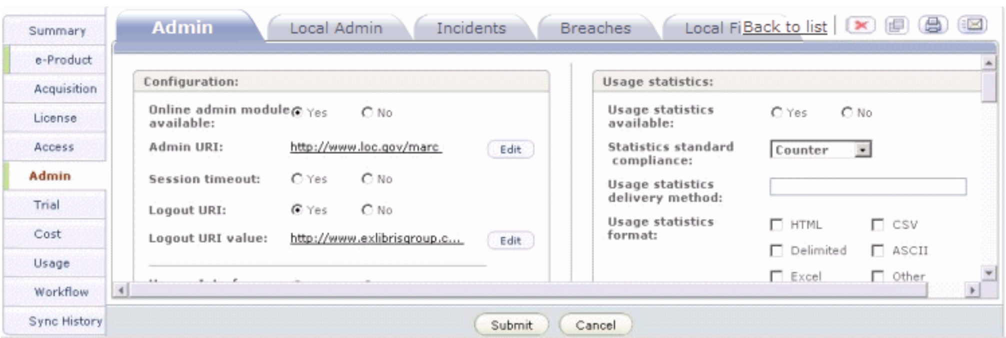

Figure 78: Admin Details – Editing Links

List of Admin Tab Fields

The following table describes the fields in the admin record's **Admin** tab.

Table 17. Admin Tab Fields

Field Name	Code	Description
Online admin module available	ONLINEADMIN	Denotes whether resource attributes can be directly modified online by the subscribing institution. Possible values are: **Yes**, **No**.
Admin URI	ONLINEADMINURI	The URI of the online administration module. The field is available if the value of **Online admin module available** is **Yes**.
Session timeout	SESSIONTIMEOUT	Indicates whether there is a configurable inactivity timeout. Possible values are: **Yes**, **No**.
Session timeout value	SESSIONTIMEOUTVALUE	The inactivity timeout used for the resource. The field is available if the value of **Session timeout** is **Yes**.
Logout URI	LOGOUTURI	Indicates whether a logout URI can be specified. Possible values are: **Yes**, **No**.
Logout URI value	LOGOUTURIVALUE	The logout URI used with the resource. The field is available if the value of **Logout URI** is **Yes**.
User e-Interface configuration	UICONFIGURATION	The ability to control user interface features. Possible values are: **Yes**, **No**.
Subscriber branding available	SUBSCRIBERBRANDING	Indicates whether a branding feature is available. Possible values are: **Yes**, **No**.
Subscriber branding activated	SUBSCRIBERBRANDING ACTIVSTATUS	Indicates whether branding has been activated. Possible values are: **Yes**, **No**.

Table 17. Admin Tab Fields

Field Name	Code	Description
Subscriber branding note	SUBSCRIBERBRANDING NOTE	Subscriber branding note.
Personalization services available	PERSONALIZATION SERVICES	Indicates whether alerting and other personalization features are available. Possible values are: **Yes**, **No**.
Z39.50 supported	Z3950	Indicates the ability of the interface of the resource to support z39.50. Possible values are: **Yes**, **No**.
Hook to holdings	HOOKTOHOLDINGS	A link to library holdings is available. Possible values are: **Yes**, **No**.
Holdings activated	HOLDINGSACTIVATED	The activation of a link to library holdings. Possible values are: **Yes**, **No**.
Provider reference linking available	PROVIDERREFERENCE LINKING	The availability of links to external content created by the provider of the resource. Possible values are: **Yes**, **No**.
Inbound linking indicator	INBOUNDLINKING INDICATOR	The availability of a link to internal stable locations within a product. Possible values are: **Yes**, **No**.
Inbound linking activation status	INBOUNDLINKING ACTIVATIONSTATUS	The activation of a link to internal stable locations within a product. Possible values are: **Yes**, **No**.
OpenURL compliant	OPENURLCOMPLIANT	The ability of the electronic product and its content to be Open URL compliant. Possible values are: **Yes**, **No**.
OpenURL activation status	OPENURLACTIVATION STATUS	The activation of external links. Possible values are: **Yes**, **No**.

Table 17. Admin Tab Fields

Field Name	Code	Description
Linking note	LINKINGNOTE	Information about external linking—for example, implementation details or other notes
MARC record availability	MARCRECORD AVAILABILITY	The availability of MARC records for the resource. Possible values are: **Yes**, **No**.
MARC record note	MARCRECORDNOTE	Further information regarding the availability of MARC record sets—for example, free or purchased, acquisition and implementation status, and so forth. Possible values are: **Yes**, **No**.
Interface languages availability	INTERFACELANGUAGES AVAILABILITY	The availability of multiple languages for the Interface. Possible values are Yes, No.
Interface languages implemented	INTERFACELANGUAGE IMPLEMENTED1- 3	The activation of one or more interface languages. The field is available if the value of **Interface languages availability** is **Yes**.
Usage statistics available	AVAILABLE	The availability of usage statistics for the resource. Possible values are: **Yes**, **No**.
Statistics standard compliance	STATISTICSSTANDARD COMPLIANCE	The official standard to which the statistics conform. Default values are COUNTER and ICOLC 1998. These fields can be customized by modifying the code table.
Usage statistics delivery method	DELIVERYMETHOD	The manner in which statistics are made available.

Table 17. Admin Tab Fields

Field Name	Code	Description
Usage statistics format	FORMATHTML FORMATDELIMITED FORMATEXCEL FORMATPDF FORMATCVS FORMATASCII FORMATOTHER	The formats in which statistics are made available. The following formats are available: ■ HTML ■ Delimited ■ Excel ■ PDF ■ CSV ■ ASCII ■ Other
Usage statistics frequency	FREQUENCY	The frequency with which statistics are made available. The possible values are: ■ Annual ■ Bi-annual ■ Monthly ■ Quarterly ■ User-selectable These fields can be customized by modifying the code table.
Usage statistics online location	ONLINELOCATION	The online location at which statistics can be accessed, such as a URL or file path.
Usage statistics delivery addressee	DELIVERYADDRESS	Library contact name.
Usage statistics note	NOTE	Other information regarding usage statistics.
Usage statistics locally stored	LOCALLYSTORED	Information about and/or links to locally stored data.
Hardware requirements – internal	HARDWAREREQUIRE MENTSPRIVATE	Information about hardware requirements and restrictions – internal.

Table 17. Admin Tab Fields

Field Name	Code	Description
Hardware requirements – public	HARDWAREREQUIRE MENTSPUBLIC	Information about hardware requirements and restrictions – public.
Software requirements –- internal	SOFTWAREREQUIRE MENTSPRIVATE	Information about software requirements – internal.
Software requirements – public	SOFTWAREREQUIRE MENTSPUBLIC	Information about software requirements – public.
Maintenance window value	MAINTENANCE WINDOWVALUE	The provider's regularly scheduled downtime window for this product. The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.
Provider system status URI	PROVIDERSYSTEM STATUSURI	The URI at which the provider posts system status information.
Provider system status URI type	PROVIDERSYSTEM STATUSURITYPE	The type of URI used to post system status information. The following options are available: ■ URL ■ URN
Local performance monitoring note	LOCALPERFORMANCE MONITORINGNOTE	Information concerning Web sites or programs that carry out local performance monitoring.
Incident log	INCIDENTLOG	A log of downtime and problem reports and their resolution.

Table 17. Admin Tab Fields

Field Name	Code	Description
Training information	TRAININGINFORMATION	Information regarding the availability of special training, such as instructions on how to bypass simultaneous user restrictions. May also include training contact names and other general information.
Administrative documentation	ADMINDOCUMENTATION	Information about and/or location of documentation available for product administrators.
User documentation	USERDOCUMENTATION	Information about and/or location of documentation available for end users
Administrative ID	ID	Admin ID. Unique. Not null.
Creation date	CREATIONDATE	Date record created. Automatically generated by Verde.
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the admin record.
Latest update	UPDATEDATELOCAL	The date on which the record was updated in Verde.
By	UPDATEDBY	Verde user. Contains the ID of the staff person who updated the admin record.

Local Admin Tab

In the **Local Admin** tab, any number of local usage records can be defined. New records are created by clicking the **Add Local Admin** button.

Once a record has been created, it can be expanded or collapsed using the + or – (plus or minus) buttons to the left of the record. If more than one local record exists, all records can be expanded or collapsed by clicking the **Expand All** or **Collapse All** button. Click the record's **Delete**  button to delete the record.

Figure 79: Local Admin

Incidents Tab

In the **Incidents** tab, you can view all incidents in which the e-product did not performed as expected that were reported by the library to the e-product supplier/vendor.

Any number of incident records can be defined. Once a record has been created, the user can edit, view, update, or delete the record. New incident records can be created by clicking the **New** button in the Incidents tab. Alternatively, you can create a new incident record by copying and modifying another record.

Incident type, Status, and **Organization** are mandatory fields. If you click the ellipsis to the right of the **Organization** field, the List of Organizations window opens, displaying a list of defined organizations that you can filter by role.

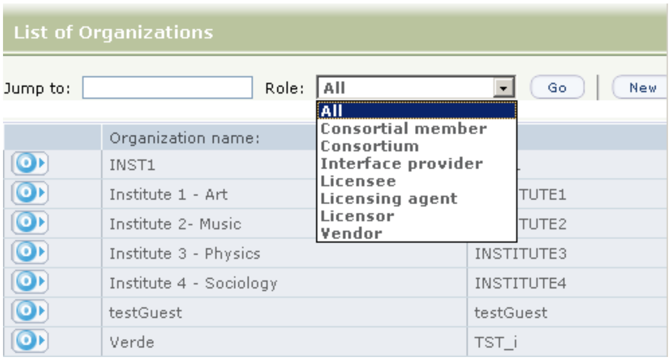

Figure 80: List of Organizations

NOTE:

If an organization is missing from the List of Organizations window, you can add the organization by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.

If you click the ellipsis to the right of the **Contact** field, the List of Contacts window opens, displaying a list of defined contacts that you can filter by role.

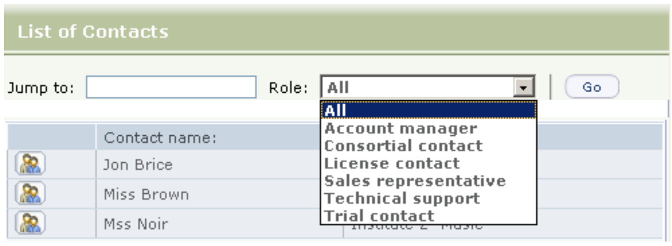

Figure 81: List of Contacts

If there is more than one incident record, the records can be sorted by date, title, status, and type.

Figure 82: Incident Record

Incidents can be linked to only one e-product . The e-product can be of any type except e-print. An e-product, however, can have more than one incident.

When adding a new incident record, note the following:

- The **Occurred date** and **Reported date** fields are populated with the current date. These dates may be modified as necessary.
- **Incident type**, **Status**, and **Organization code** fields are mandatory fields. The first two can be pre-defined to contain a library-defined value by default.
- Once the record has been submitted, the following fields are automatically updated as well:
  - **Incident code**
  - **Creation date, by**
  - **Latest update, by**

Breaches Tab

In the **Breaches** tab, you can view breach records, which are incidents that a vendor reports to the site (library) if the site has not complied with license terms.

As with the incident records, any number of breach records can be defined. Once a record has been created, you can edit, view, update, or delete the record. New breach records can be created by clicking the **New** button in the Breaches tab. Alternatively, you can create a new breach record by copying and modifying another record.

Breach type, **Status**, and **Organization** are mandatory fields. If you click the ellipsis to the right of the **Organization** field, the List of Organizations window opens, displaying a list of defined organizations that you can filter by role.

NOTE:

If an organization is missing from the List of Organizations window, you can add the organization by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.

If you click the ellipsis to the right of the **Contact** field, the List of Contacts window opens, displaying a list of defined contacts that you can filter by role.

If there is more than one breach record, the records can be sorted by date, title, status, and type.

Breach records can be linked to only one e-product . The e-product can be of any type except e-print. An e-product, however, can have more than one breach record.

When adding a new breach record, note the following:

- The **Occurred date** and **Reported date** fields are populated with the current date. These dates may be modified as necessary.
- **Breach type**, **Status**, and **Organization code** fields are mandatory fields. The first two can be pre-defined to contain a library-defined value by default.

- Once the record has been submitted, the following fields are automatically updated as well:
  - **Breach code**
  - **Creation date, by**
  - **Latest update, by**

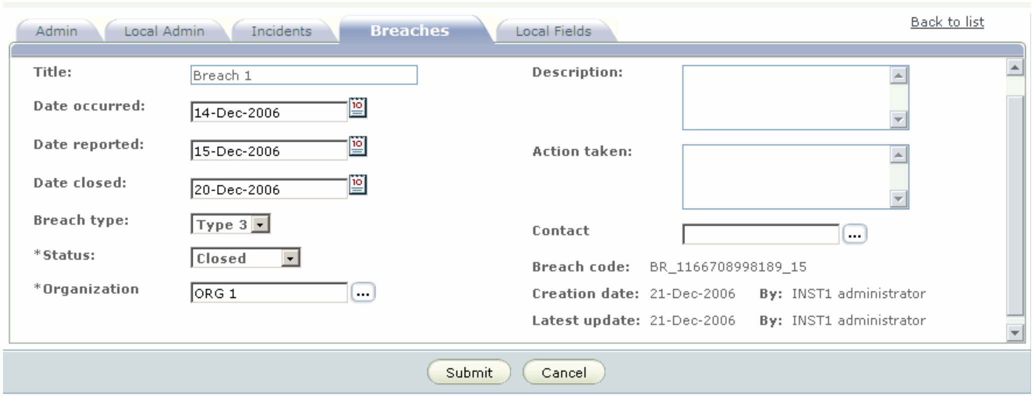

Figure 83: Breach Record

13

Trial Records

This section includes:

- **About Trial Records** on page **181**
- **Trial Records List** on page **182**
- **Trial Details** on page **182**
- **Trial Process** on page **186**

About Trial Records

The trial record stores the information necessary to manage a trial for an e-product, including the length of the trial, the trial participants, to whom the resource is available during the trial, whether the trial is licensed, and the trial decision.

NOTE:

The trial process usually activates the e-product upon the start of the trial and then deactivates the e-product upon the trial's end. These activation changes are reflected in SFX as part of the ongoing synchronization process. If you want to disable synchronization of the e-product, change the value of the **Update target** e-product field from **SFX** to an empty value.

Typically, trial records are created for an e-package. However, it is also possible to create trial records for e-interfaces and e-standalones.

The trial workflow includes both online and batch processes. There are two Verde tasks—sending alerts to trial participants and managing trials—that relate only to trials.

Trials can be conducted on active or inactive e-products. If the trial is conducted on an e-product that is already active, the only field in the e-product that is automatically updated is the **Selection status**. If the trial is conducted on an e-product that is not active, data from the trial is automatically updated by the e-product. The trial start and end dates are taken from the trial and placed in the e-product's **Activation from date** and **Expiration date** dates. If a license is requested by the trial, it is created automatically, and the license's start and end dates are taken from the trial. When a trial is over, if the decision is not to buy the e-product, the e-product is rejected and the license retired.

NOTE:
The trial record contains information necessary to manage the trial only. Access information is managed in the access record, e-product definitions are set in the e-product record, and if a license is required, the license terms are stored in the license record.

Trial Records List

The **Trial Records List** displays the list of trials that have been run on a particular e-product.

The Trial Records List displays the following information for each record:

- whether the record is the parent record or the inherited record
- if the record is currently active
- the date on which the trial starts
- the date on which the trial ends
- the trial status
- the decision regarding the e-product that is on trial
- a button in the Actions column that enables you to edit the record, if you have editing privileges and the record is not inherited.

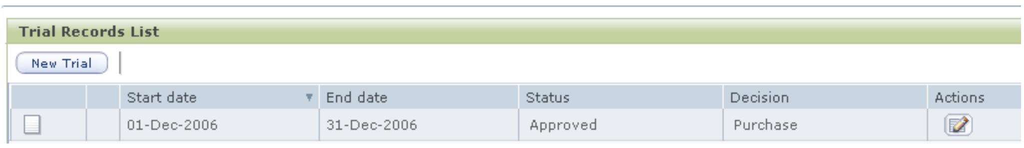

Figure 84: Trial Records List

Trial Details

The trial record contains three tabs:

- **Details** – Contains data related to the trial.

- **Participants** – Enables you to add the trial participants. Note that trial participants cannot be added until the trial record is submitted and saved on the server.
- **Local Fields** – Is populated only if local fields have been defined by the Verde administrator for trial records. Note that there is a separate Local Fields tab for each trial record, enabling you to define different local fields for each trial record

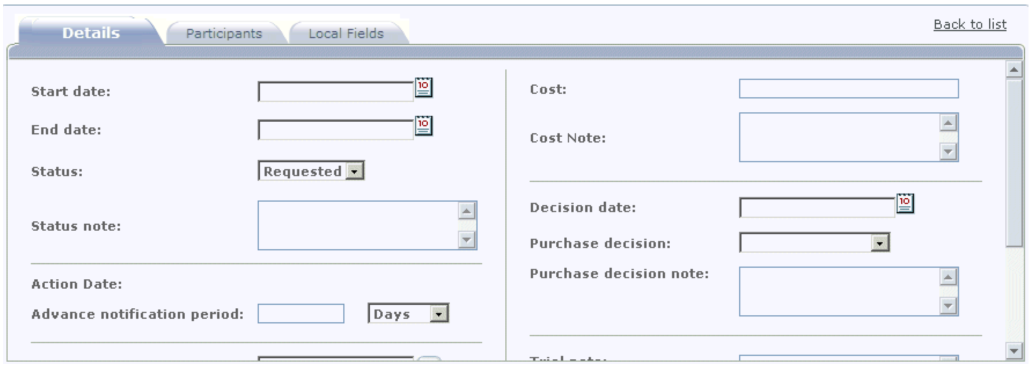

Figure 85: Trial Details

List of Details Tab Fields

The following table describes the fields in the trial record's **Details** tab.

Table 18. Details Tab Fields

Field Name	Code	Description
Start date	STARTDATE	The date on which the trial begins or on which the product becomes available.
End date	ENDDATE	The date on which the trial ends or on which the product will no longer be accessible unless acquired.
Status	STATUSCODE	The possible values are: ■ Approved ■ On hold ■ On trial ■ Requested ■ Trial over These fields can be customized by modifying the code table.
Status note	STATUSNOTE	The notes about the trial.

Table 18. Details Tab Fields

Field Name	Code	Description
Advance notification period	TICKLERPERIOD TICKLERPERIOD MODECODE	The advance notice interval required by the library to warn of an upcoming trial end date. The default values are: **Days**, **Months**, and **Weeks**. These fields can be customized by modifying the code table.
Contact	ORGCONTACT CODE	Organization contact. Points to the **Name** field in the **Organizationcontacts** table.
Available to public	AVAILABLETO PUBLIC	An indication of the availability of the trial product to the public.
License required	LICENSEREQUIRED	Indicates whether a license is required for the product's trial period.
Activate SFX	ACTIVATESFX	Indicates whether to activate SFX for the product's trial period. Currently not functional.
Cost	COST	The cost of the trial.
Cost note	COSTNOTE	A note about the cost.
Decision date	DECISIONDATE	The date on which the trial decision is made.
Purchase decision	DECISIONSTATUS CODE	The possible values are: ■ Deferred ■ Do not purchase ■ Null ■ Purchase These fields can be customized by modifying the code table.
Purchase decision note	DECISIONNOTE	The notes about the purchase decision.
Trial note	NOTE	Notes about the trial.
Trial code	TRIALCODE	The trial code.
Creation date	CREATEDDATE	The date on which the trial was created.

Table 18. Details Tab Fields

Field Name	Code	Description
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the trial record.
Latest update	UPDATEDATE	The date on which the trial was updated.
By	UPDATEDBY	Verde user. Contains the ID of the staff person who updated the trial record.

Creating a New Trial Record

You can create new trial records for e-packages, e-standalones, and e-interfaces only.

NOTE:
Only users with edit privileges can create new trial records.

To create a new trial record:

1. Select an e-package, e-standalone, or e-interface.
2. In the left menu, select **Trial**.
3. In the Trial Records List, click the **New Trial** button.
4. Complete the fields displayed in the **Details** tab. Note the following:
   - If you select the status **Requested**, there are no mandatory fields.
   - If you select the status **Approved** or **Trial Over**, the following fields are mandatory:
     - **Start date** and **End date**
     - **Available to public**
     - **License required**
     - **Decision date**
5. Click **Submit**. The new trial record is displayed in the Trial Records List.

Editing a Trial Record

To edit an existing trial record, from the **Actions** column of the Trial Records List, click the **Edit** button.

Only users with editing privileges can edit an existing trial record. Once a trial record has a status of **On Trial**, it cannot be edited.

Deleting a Trial Record

Trial records can be deleted only when the trial status is **Requested** or **On Hold**. Other trial statuses prevent the trial record from being deleted.

Trial Process

When a request is made to run a trial on a particular e-resource, you should create a trial record and assign the status **Requested** to the record. Negotiations begin at this point and the trial record gets completed as the process progresses.

NOTE:
Trials cannot be run on e-constituents. They can be run on e-packages, e-standalones, and e-interfaces only. When a trial is run on an e- package or e-interface, all lower-level records are automatically included in the trial.

By the time a trial has been approved, the following information must be completed in the trial record:

- **Start date** and **End date**
- **Available to public**
- **License required**
- **Decision date**

In addition, it is recommended that you add trial participants. Trial participants are notified of changes to the trial record, including changes to the trial's start and end dates, as well as the registering of a trial decision. For more information about trial participant alerts, see **Trial Participant Alerts** on page **304**. In addition, trial participants are notified of the trial's completion before the trial is over. You set the period of advance notification in the **Advance notification date** field. The e-mail sent to participants includes a link to an external feedback page so that trial participants can enter their feedback directly, without having to log in to Verde.

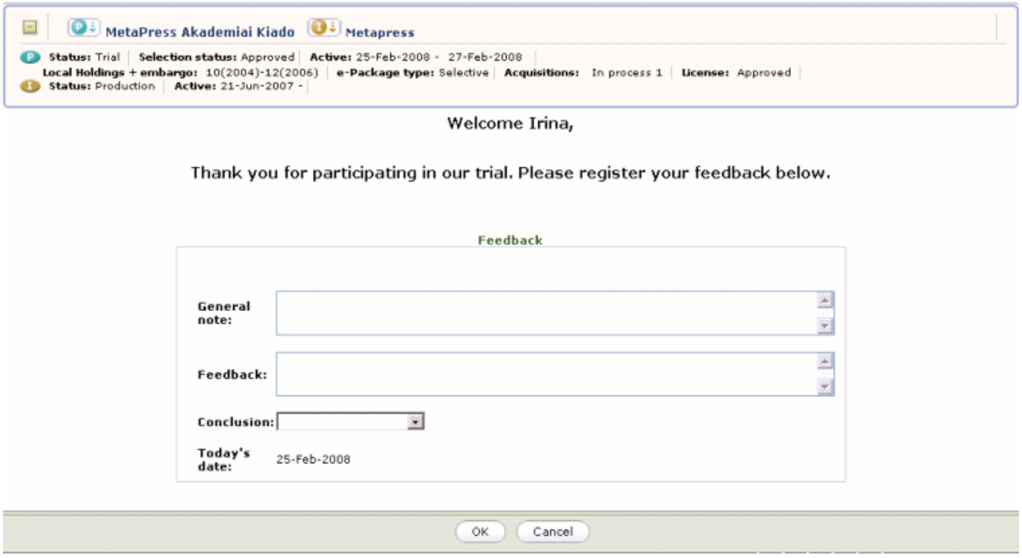

Figure 86: External Feedback Form

NOTE:

The **General note** and **Feedback** fields may include up to 2000 characters each.

If a trial participant completed the form and then reopened the link, the feedback that already exists is displayed. Note that only one feedback record per trial participant can be saved in a trial record. If a trial participant updates the feedback form, the latest updated feedback is saved.

Starting a Trial

Once a trial has been approved and a trial status of **Approved** has been assigned to the trial record, the trial management process updates the trial status to **On Trial** on the trial start date. Trial participants are alerted that the trial has begun. The e-products that are on trial are all active for the duration of the trial. They have an e-product status of **Trial**, a selection status of **Evaluation**, and **Activation from date** and **Expiration** dates that correspond to the trial start and end dates.

NOTE:

Trials that require licenses cannot become active until there is an approved license.

Trial Over

A trial is over when access to the e-product is no longer available. At this point, the trial management process updates the trial record to **Trial Over**. The trial decision need not be registered until the purchase decision due date is reached. When the trial is over, the e-product becomes inactive and the trial license is retired.

Decision Made

When the decision is registered, trial participants are alerted to the decision by the Trial Participant Alert Task. Depending on the purchase decision, the selection status of e-product is updated automatically by the system as follows:

1. If the decision is **Purchase**, the selection status is updated to **Approved**.
2. If the decision is **Do not purchase**, the selection status is updated to **Rejected**.
3. If the decision is **Deferred**, the selection status remains **Evaluation**.

At the same time, ensure that you update the decision due date. The decision due date is used to alert you that a decision is due for the trial record.

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Cost Records

This section includes:

- About Cost Records on page 189
- Cost Records List on page 189
- Cost Record Fields on page 191

About Cost Records

Cost records contain data that describes the various types of costs associated with an e-product and are intended for use in collection development decision making. Cost records can contain many cost types, including the total amount that was paid for a particular e-product for a particular period of time, the invoiced price, and the vendor price.

A cost record includes fields for storing specific information about the payment, such as budget or fund name, check number, or invoice number. Multiple cost records can be linked to a single e-product.

Unlike the invoice that is linked to an acquisition record, cost records are linked directly to e-products. This means that while the invoice is entered for an entire e-package, cost records can be entered for individual e-constituents.

Cost Records List

The **Cost Records List** displays all of the cost records for a particular e-product. The list is sorted in reverse chronological order.

The Cost Records List displays the following information for each record:

- the cost type
- the payment date
- whether the amount is a credit or debit

- the payment amount
- buttons that enable the following actions:
  - editing the record, if you have editing privileges and the record is not inherited
  - copying the record to the same e-product

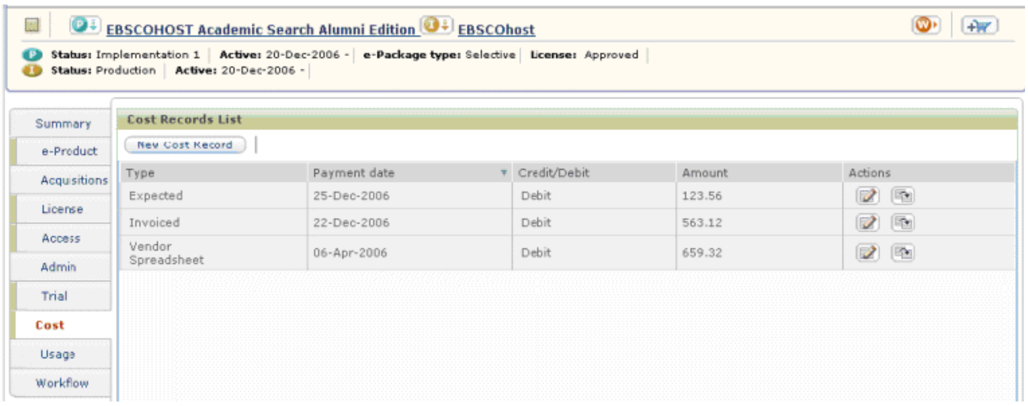

Figure 87: Cost Records List

To create a new cost record, click the **New Cost Record** button. The Details tab opens, enabling you to define values for the cost record fields. After you click **Submit**, the record is displayed in the Cost Records List.

NOTE:

A **Local Fields** tab is displayed, in addition to the Details tab. The Local Fields tab is populated only if local fields have been defined by the Verde administrator for cost records. Note that there is a separate Local Fields tab for each cost record, enabling you to define different local fields for each cost record.

Cost Record Fields

The following table describes the fields in the cost record's **Details** tab.

Table 19. Details Tab Fields

Field Name	Code	Description
Cost type	COSTTYPE	The possible values are: ■ Expected ■ Invoiced ■ List ■ Print ■ Vendor Spreadsheet These fields can be customized by modifying the code table.
Vendor name	VENDORNAME	Organization name. Points to the **Name** field of the **Organizationame** table.
Credit/Debit	AMOUNTUNITTYPE	There possible values are: **Debit** and **Credit**.
Amount	AMOUNTVALUE	Cost amount.
Payment period from	PAYMENTPERIOD FROM	The date on which the payment period begins.
Payment period to	PAYMENTPERIOD TO	The date on which the payment period finishes.
Payment date	PAYMENTDATE	The date of payment.
Payment made by	PAYMENTMADEBY	The name of person by whom the payment was made.
Consortial purchase	CONSORTIAL PURCHASE	Indicates a consortia purchase. Possible value are: **Yes** or **No**.
Percentage of total	PERCENTAGEOF TOTAL	If there is a consortia purchase, indicates the percentage of participation for your instance.
Cost code	COSTCODE	System-generated identifier.
Acquisitions No	ORDERNO	Acquisitions number of related acquisition record.
Invoice No	INVOICENO	Invoice number of related invoice record.

Table 19. Details Tab Fields

Field Name	Code	Description
Subscription No	SUBSCRIPTIONNO	Subscription number of related subscription.
Cost note	COSTNOTE	Additional information about cost.
Cost ID	ID	Cost ID. Unique identifier.
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the cost record.
Creation date	CREATEDDATE	The date on which the cost record was created.
Latest update	UPDATEDATE	The date on which the cost record was updated.
By	UPDATEDBY	Verde user. Contains the ID of the staff person who updated the cost record.

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Usage Records

This section includes:

- About Usage Records on page 193
- Usage Records List on page 193
- Usage Record Fields on page 194

About Usage Records

Usage records store usage statistics that have been generated by the Usage Statistics Service (UStat) or by other systems, such as vendor systems, linking software, and IT departments. For information regarding UStat, refer to the UStat Guide.

Usage records can be linked to any type of e-product.

Usage Records List

The **Usage Records List** displays the usage records for a particular e-product. The usage records are displayed in chronological order (according to the records' start dates).

The Usage Records List displays the following information for each record:

- the usage statistics number (for example, the number of successful requests)
- the type of usage report generated (for example, full-text requests)
- the start and end periods of the usage report
- the library from which the statistics were gathered

- a button in the Actions column that enables you to edit the record, if you have editing privileges and the record is not inherited.

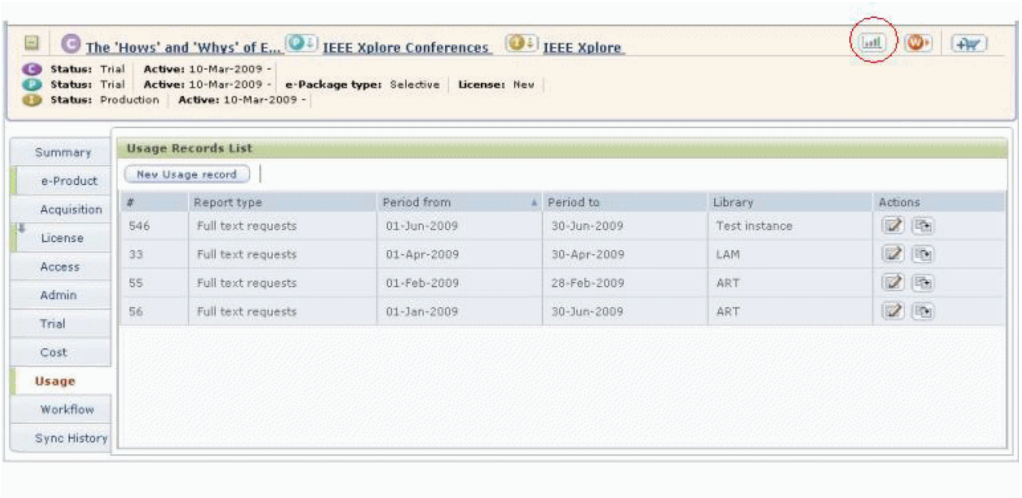

Figure 88: Usage Records List

To create a new usage record, click the **New Usage Record** button. The Details tab opens, enabling you to define values for the usage record fields. After you click **Submit**, the record is displayed in the Usage Records List.

To generate a usage statistics report, click the **Find Work Usage Statistics** button, located in the top right corner, next to the work record icon. For details regarding usage statistics reports for work records, refer to the UStat Guide.

NOTE:

A **Local Fields** tab is displayed, in addition to the Details tab. The Local Fields tab is populated only if local fields have been defined by the Verde administrator for usage records. There is a separate Local Fields tab for each usage record enabling you to define different local fields for each usage record.

Usage Record Fields

The following table describes the fields in the usage record's **Details** tab.

Table 20. Details Tab Fields

Field Name	Code	Description
Period from	FRMPERIOD	Mandatory field. The date on which the usage period begins.

Table 20. Details Tab Fields

Field Name	Code	Description
Period to	TOPERIOD	Mandatory field. The date on which the usage period finishes.
Number	UNUMBER	The usage statistics number (for example, the number of successful requests).
Report/ Page type	REPORTTYPE	Usage report type. The possible values are: ■ Abstracts ■ Full text requests ■ Full-text HTML requests ■ Full-text PDF requests ■ Full-text postscript requests ■ Full-text total requests ■ References ■ Searches ■ Sessions ■ Turnaways ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized by modifying the code table.
Institution	INSTITUTECODE	The library that accesses the e-product if the usage is limited to one library. Points to the **ORGANIZATIONCODE** field in the **ORGANIZATION** table.
Usage summary note	USAGESUMMARY	Additional information about usage.

Table 20. Details Tab Fields

Field Name	Code	Description
Usage record type	RECTYPECODE	The format that is used by the vendor for usage reports. The possible values are: ■ Counter ■ Other ■ Local ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized by modifying the code table.
Counter level	COUNTERLEVEL	If a usage report received from a vendor is in Counter format, specify the **Counter level**. The possible values are: ■ Level 1 ■ Level 2 ■ Level 3 ■ Level 4 ■ Level 5 These fields can be customized by modifying the code table.
Vendor	VENDORCODE	The vendor who provides the usage report. Points to **ORGANIZATIONCODE** field in the **ORGANIZATION** table.
Usage ID	ID	Usage ID. A unique identifier generated by Verde.
Creation date	CREATIONDATE	The date on which the usage record was created.
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the usage record.
Latest Update	LATESTDATE	Verde user. Contains the ID of the staff person who updated the usage record.

Table 20. Details Tab Fields

Field Name	Code	Description
By	LATESTBY	The date on which the usage record was updated.

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Workflows

This section includes:

- About Verde Workflows on page 199
- The Workflow Work Area on page 203
- License Workflow on page 206
- Acquisitions Workflow on page 212
- Review e-Product and Renew Acquisitions Workflows on page 219

About Verde Workflows

The Verde workflow engine is designed to enable libraries to manage the complex workflows associated with electronic resource management from within their ERM systems. The workflow engine provides the tools for managing workflows containing a large numbers of tasks—general and site-specific—performed by different staff, often across multiple departments. The workflow engine uses roles to direct tasks to the appropriate staff user.

There are three workflow options available in Verde:

- License
- Acquisitions
- Review e-Product and Renew Acquisitions

The Acquisitions and License workflows are specific to a single e-product. The Review e-Product and Renew Acquisitions workflows (run together) are tied to an acquisition record and thus can be related to one or more e-products, depending on the acquisition record.

Acquisitions and License workflows are typically performed once on newly selected e-products. The Review e-Product and Renew Acquisitions workflows can be repeated annually or at any time that a subscription comes up for renewal.

All workflows can be initiated automatically by the system at the appropriate time. The License and Acquisitions workflows can also be initiated manually from the Workflow work area of the e-product. Workflow data displays both in the Verde Tasks module and in the KB Manager module, from the e-product's Acquisitions, License, and Workflow work areas.

A fixed number of site-specific tasks are built into each workflow. You can activate and rename all or part of these tasks. However, to do so, you must first contact your Verde Support representative and fill out the *Workflow Configuration Questionnaire*.

Glossary of Terms

The following table contains a glossary of terms specific to Verde workflows:

Workflow	A series of tasks that must be performed, usually in a set order, to achieve a particular result. Within Verde, these tasks all revolve around the management of electronic resources.
Task	One of the steps in a workflow. A specific action that is assigned to a particular role or staff member to be completed. A series of tasks relates to a category of work that takes place in the management of electronic resources. The workflow structure guides the librarian through these tasks.
Transition	The movement that leads from one task to the next in a workflow. The transition may either be an indication that the task is complete, or may register a decision when there are multiple options (for example, approve or reject the terms of a license).
Task description	The text that displays in Verde to describe the task and provide instructions to the user as to how to proceed.
Site-specific task	A workflow task that is site-specific—that is, customized for the library (for example, "Send license to Jane in the Legal Department for approval").
Decision	On the workflow diagram, this represents a system-made decision that does not require user input (for example, the answer to the question, "Is the e-product in question a selective or aggregator package?").

Role	Users are assigned one or more roles. Each task within a workflow is assigned a single role. Roles are used to allocate tasks to the appropriate users. In the Verde Tasks module, users will see only those tasks that are linked to their roles.

Workflow Configuration

Workflows are configured per instance. This means that within a consortium, each consortium member can configure its own workflows. The following workflow configurations are supported:

- Each of the three workflows can be turned on or off.
- The task names can be modified or translated.
- The task descriptions can be modified or translated.
- The task roles can be changed to match those in local departments.
- Each workflow has a number of site-specific tasks. These tasks can be turned on or off. The task names, descriptions, and roles can be defined by the site.
- Each task can be configured to link to an external URL. The link will display from the task window.
- E-mail configurations:
    - E-mail alerts can be sent when tasks are opened and closed. Every task can be configured to send e-mail messages to one or more addresses.
    - E-mail alerts can be sent to all potential owners of a task. A user is considered a potential owner of a task when the user has the same role as the task. For example, the role **Licensor** is defined for the task **Link e-product to license**. When this task is opened or closed, all users with role **Licensor** receive an e-mail notification.
    - If there are no users with the role that is specified for the task, the system administrator receives the e-mail instead.
    - If no role is specified for the task, the system administrator will receive the e-mail message.
    - E-mail alerts can be sent only to users that have the same role as the task and the same related library as the sponsoring library of the e-product. For example, if the sponsoring library of the e-product is **Art Library**, when the task **Link e-product to license** is opened or closed, an e-mail is sent only to those users that have the role **Licensor** and **Art Library** as their related library.
    - It is possible to cancel e-mail alerts for each individual task.

If you want to modify any of the above workflow configurations, fill out the *Workflow Configuration Questionnaire* and contact your Verde Support representative.

Workflow Roles

A role is defined for each task in a workflow. A user that has the appropriate role becomes the potential owner of a task. If only one user has been assigned this role, all tasks with this role will automatically be assigned to this user.

Roles are assigned to users by the Verde administrator.

The following figure displays the possible user roles:

Figure 89: User Roles

Workflow Permissions

There are three user permissions that relate to workflows:

- **Handle workflow**, which controls whether a user can view and update workflows and their tasks
- **Start workflow**, which controls whether a user can initiate a new workflow
- **Cancel workflow**, which controls whether a user can cancel a workflow that is in process

Without **Handle workflow** permissions, you cannot start or cancel workflows. **Handle workflow** permissions must therefore be assigned together with **start** and **cancel workflow** permissions.

NOTE:

You can see and handle all workflow tasks in the **Workflow** work area of the relevant e-product in your instance, regardless of your user permissions, if you have Handle workflow permissions. However, you cannot view workflow tasks of any other instance.

The Workflow Work Area

The Workflow work area displays the Workflow Records List, which contains the following information for each workflow:

- the name of the workflow
- the Workflow icon – When you click this icon, the workflow diagram displays. The diagram uses the following color-coding scheme:
  - White = manual tasks
  - Grey = automatic tasks
  - Blue = tasks that are not displayed in the list of tasks
  - Red outline = tasks that are currently active
- the status of the workflow – **In process**, **Finished**, or **Cancelled**
- the start date of the workflow
- the end date of the workflow (if the workflow is complete)
- the action—**Stop workflow**—that can be applied to the workflow

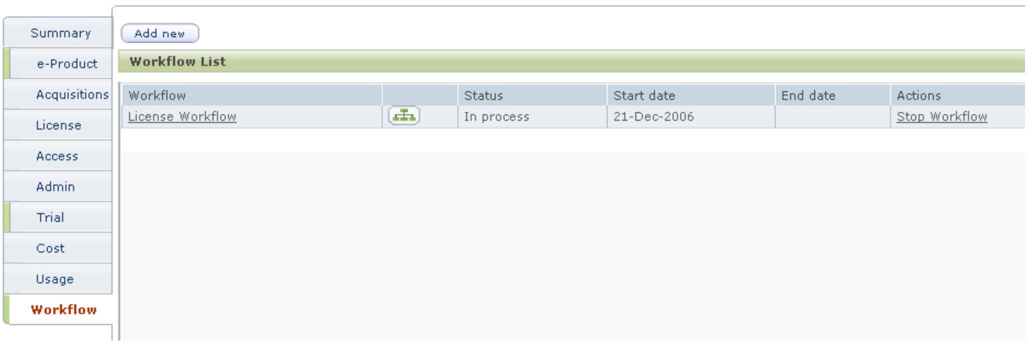

Figure 90: Workflow Work Area

When you click a workflow, the Task Records List is displayed. This list contains all of the tasks that are part of the workflow you selected.

Tasks Records List

Task	Owner	Performed By	Role	Status	Start Date	End Date	Actions
Is this the first product from this interface provider?	Administrator	Administrator	Selector	finished	29-May-2006	29-May-2006	
Can the e-product be added to an existing acquisitions record?	Administrator	Administrator	Selector	finished	29-May-2006	29-May-2006	
Identify the acquisitions record to link to	Administrator	Administrator	Access	finished	29-May-2006	29-May-2006	
Link the e-product to an existing aquisitions record	Administrator		Acquisitions	finished	29-May-2006	29-May-2006	
Update the acquisitions record			Acquisitions	opened	29-May-2006		Accept

Figure 91: Task Records List

For each task, you can view:

- the name of the task
- the owner of the task—that is, the user who accepts or submits the task. Note that when the task is closed automatically by Verde, there will be no task owner.
- the name of the user who actually performed the task (displays when the task is closed)
- the user role that is associated with the task
- the status of the task – **Opened** or **Finished**
- the start date of the task
- the end date of the task
- the actions—**Accept** or **Release**—that can be applied to the task

If a task is open, but has not been submitted, it is marked in green, and the Action column contains **Accept**. When the task is closed—manually or automatically by the system—the task is no longer marked in green.

Tasks Records List

Task	Owner	Role	Status	Start Date	End Date	Actions
Is this the first product from this interface provider?	YALE administrator	Selector	finished	23-May-2006	23-May-2006	
Create a new acquisitions record	YALE administrator	Acquisitions	finished	23-May-2006	23-May-2006	
Review the business terms	**YALE administrator**	**Acquisitions**	**opened**	**23-May-2006**		**Release**

Figure 92: Tasks Marked in Green

When you click a task, a window with the details of the task opens.

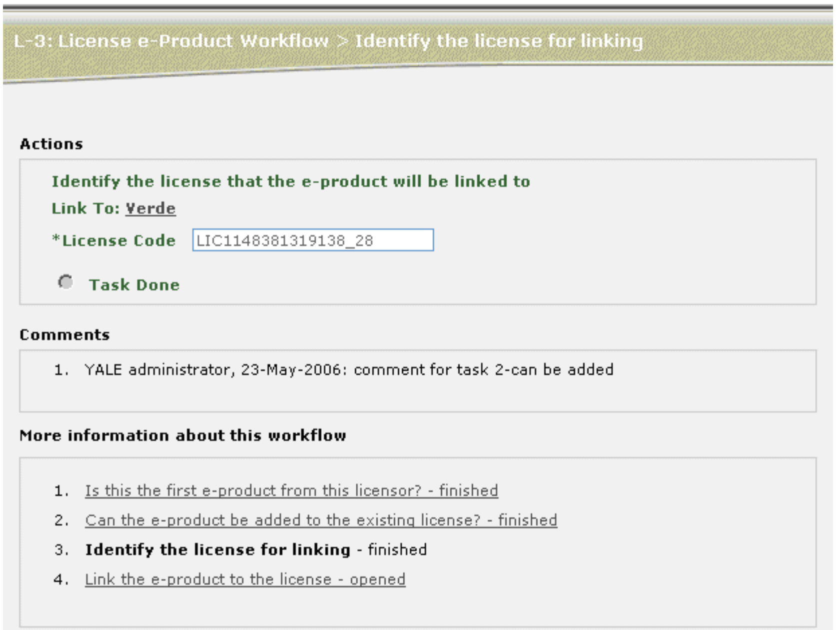

Figure 93: Task Details

This window contains the following information:

- the name and number of the task—for example, **L-3: License e-product workflow > Identify the license for linking**
- a link to the e-product (depending on the task) – links you to the related record of the e-product. For example, if the task is **Link the e-product to an existing acquisitions record**, the **Link to Verde** link takes you to the related acquisition record.
- the transition, if relevant
- comments
- more information about the workflow – This section includes a list of open and closed tasks that are part of the same workflow. You can link to the details of these tasks as well.

You can submit changes to a task, including registering a decision, using the **Submit** button. Changes to the task are not saved until the task is submitted.

License Workflow

The **License** workflow is used for newly approved e-products that must be licensed for the first time. It includes a series of tasks that determine whether the e-product can be added to an existing license or a new license must be created, and, if a new license is created, whether it will be a vendor license or a local license. The workflow ends when the e-product is linked to an existing license or a new license is created and approved.

The License workflow may be initiated manually by clicking the **Add New** button in the Workflow work area, or automatically when the **Purchase decisio**n field of a trial record is updated to **Purchase**.

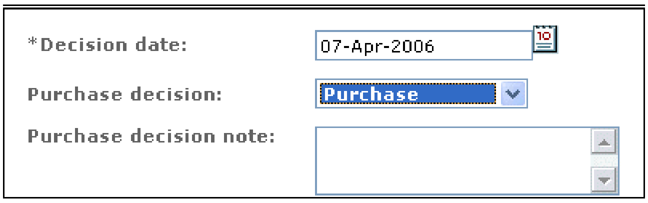

Figure 94: Purchase Decision Status – Purchase

If this is the first workflow created for the e-product, a green bar is added to the left of the **Workflow** menu option, indicating that the e-product now has workflow records.

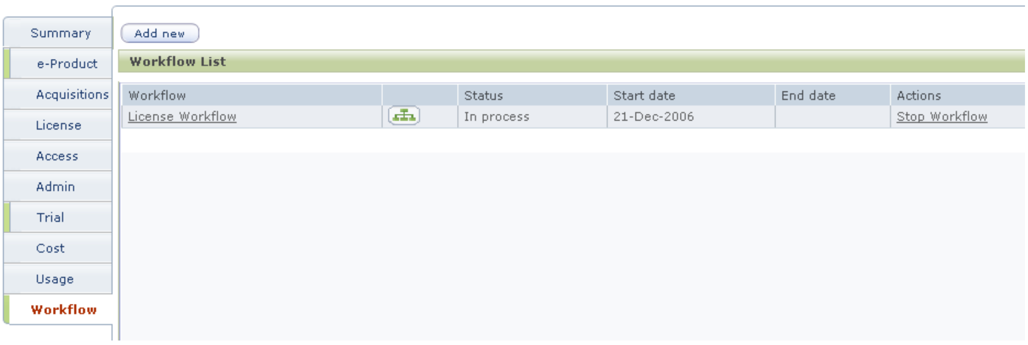

Figure 95: License Workflow

If you access the e-product's License tab, a **Workflow** icon is displayed. This icon indicates that there is a workflow linked to the e-product record.

Figure 96: Workflow Icon Displayed

You use the Workflow work area to work through the defined tasks for the License workflow. The following diagram illustrates this workflow:

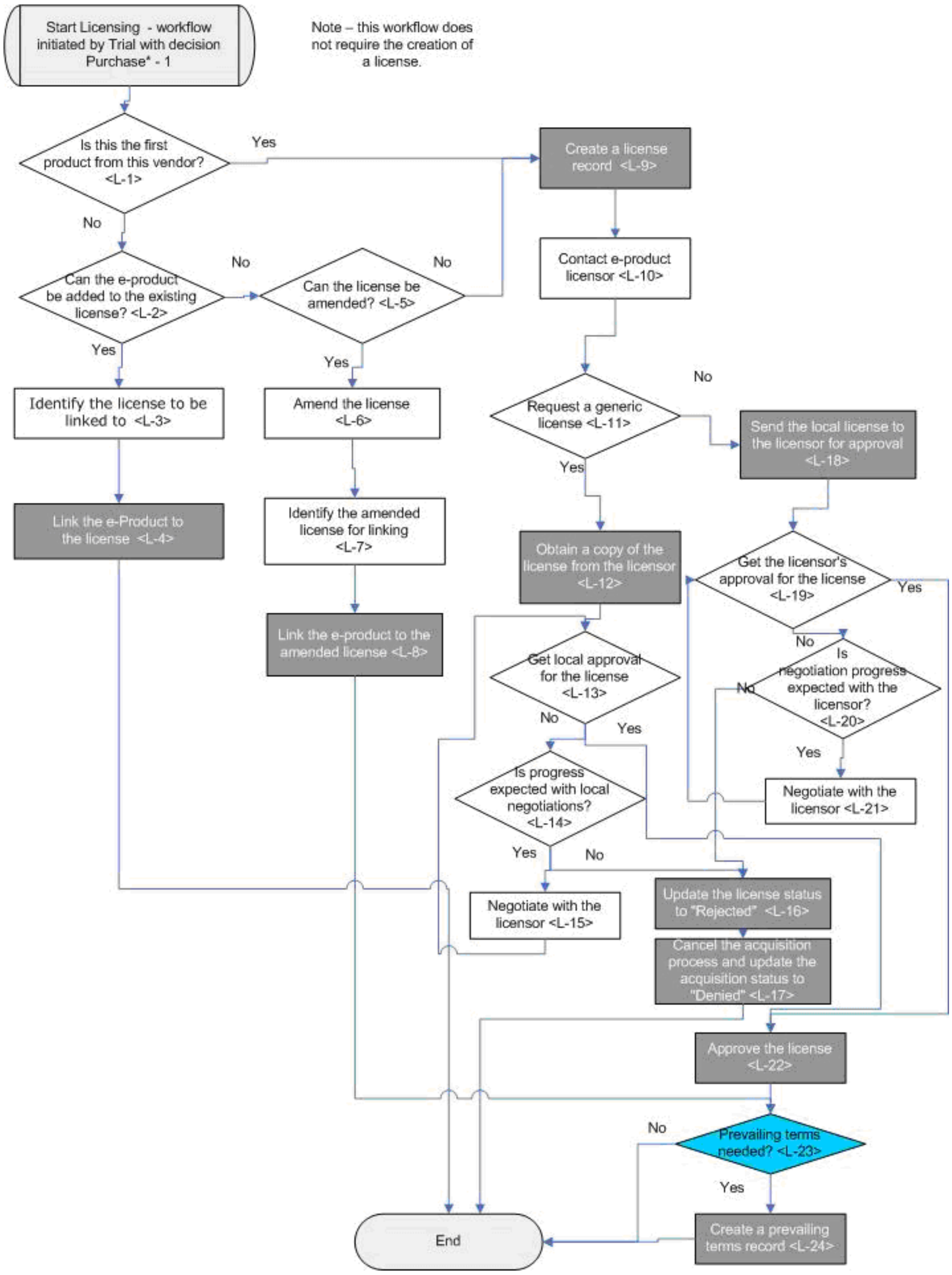

Figure 97: Diagram of License Workflow

The following table decribes the tasks that are part of the License workflow.

NOTE:
Type indicates whether the task is closed manually, automatically by Verde, or by a decision point.

Table 21. Tasks in License Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
L-1	Is this the first product from this vendor?	Determine whether this is the first product that has been ordered from this vendor, by linking to the e-product	Selector	Manual	First e-product or not first e-product	Yes – L-9 No – L-2	e-Product
L-2	Can the e-product be added to the existing license?	Determine whether the e-product can be added to an existing license with the same licensor	Licensor	Manual	Can be added or cannot be added	Yes – L-3 No – L-5	License
L-3	Identify the license to be linked to	Identify the license to which the e-product will be linked	Licensor	Manual	License number of the license to which the e-product will be added. (Verde validates the number)	L-4	License
L-4	Link the e-product to the license	Use the link license function in the License tab of the e-product to link the e-product to the license identified in task L-3	Licensor	Automatic; task is closed when the e-product is linked to the license identified in task L-3		End	

Table 21. Tasks in License Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
L-5	Can the license be amended?	Does the license need to be amended? Determine whether it can be amended	Licensor	Manual	Can be amended or cannot be amended	Yes – L-6 No – L-9	License
L-6	Amend the license	Amend the license so that the terms reflect the terms for all the e-products covered by this license.	Licensor	Manual	Done	L-7	License
L-7	Identify the amended license for linking	Identify the amended license to which the e-product will be linked	Licensor	Manual	License number (Verde validates the number)	L-8	License
L-8	Link the e-product to the amended license	Use the link license function in the License tab of the e-product to link the e-product to the amended license.	Licensor	Automatic	Task is closed when the license link is built	L-23	License
L-9	Create a license record	Create a new license for this e-product	Licensor	Automatic	Task closed with creation of license with status **New**	L-10	License
L-10	Contact e-product licensor	Contact the licensor and begin negotiating license	Licensor	Manual	Done	L-11	e-Product

Table 21. Tasks in License Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
L-11	Request a generic license	Does the licensor have a generic license? Request a copy.	Licensor	Manual	Generic license exists, no generic license available	Yes – L-12 No – L-18	License
L-12	Obtain a copy of the license from the licensor	Obtain a copy of the generic license from the licensor. Update the license with the license terms. Update the license by assigning a status **Pending local response**.	Licensor	Automatic	Task complete when the license status is updated to **Pending local response**	L-13	License
L-13	Get local approval for the license	Review and approve the vendor license	License manager	Manual	Can be approved, cannot be approved	Yes – L-22 No – L-14	License
L-14	Is progress expected with local negotiations?	Is progress expected with local negotiations?	Licensor	Manual	Progress expected, progress not expected	Yes – L-15 No – L-16	e-Product
L-15	Negotiate with the licensor	Negotiate license terms with the licensor	Licensor	Manual	Done	L-13	No link
L-16	Update the license status to **Rejected**	Update the license status to **Rejected**	Licensor	Automatic	The task is closed when the license status is updated to **Rejected**	L-17	License

Table 21. Tasks in License Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
L-17	Cancel the acquisition process and update the acquisition status to **Denied**	Cancel the acquisition process and update the acquisition status to **Denied**	Licensor	Automatic	The task is closed when the acquisition e-product workflow is cancelled	End	e-Product
L-18	Send the local license to the licensor for approval	Send the licensor a copy of the local generic license. Update the license by assigning a status **Pending licensor response**	Licensor	Automatic	The task is complete when the license status is updated to **Pending licensor response**	L-19	License
L-19	Get the licensor's approval for the license	Has the licensor approved the license?	Licensor	Manual	Approved, not approved	Yes – L-22 No – L-20	License
L-20	Is negotiation progress expected with the licensor?	Is negotiation progress expected with the licensor?	Licensor	Manual	Progress expected, progress not expected	Yes – L-21 No – L-16	e-Product
L-21	Negotiate with the licensor	Negotiate license terms with the licensor	Licensor	Manual	Done	L-19	
L-22	Approve the license	Review and approve the license	License manager	Automatic	The task is closed when the license status is updated to **Approved**	L-23	License

Table 21. Tasks in License Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
L-23	Are prevailing terms needed?	The system checks to see if prevailing terms are needed		Automatic	This task does not display but is performed automa-tically by the system	Prevailing terms needed – L-24, prevailing terms not needed – End	
L-24	Create a prevailing terms record	If there is more then one active license then create a prevailing terms record for the e-product. It should contain terms from both licenses.	Licensor	Automatic	The task is closed when a prevailing terms license is created.	End	

Acquisitions Workflow

The **Acquisitions** workflow is used for newly approved e-products that are typically being acquired for the first time. It includes a series of tasks that determine whether the e-product can be added to an existing acquisition record for the same vendor, or a new acquisition record must be created. Tasks in the workflow include negotiating business terms, approving the acquisition record, notifying the vendor, and updating the ILS with the new titles.

The Acquisitions workflow may be initiated manually by clicking the **Add New** button in the Workflow work area, or automatically when the **Purchase decisio**n field of a trial record is updated to **Purchase**.

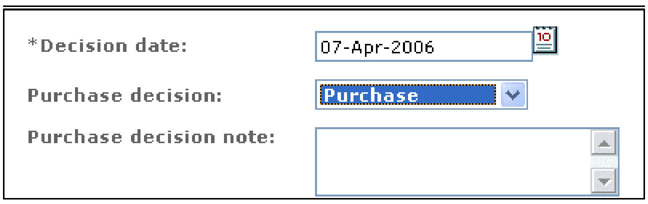

Figure 98: Purchase Decision Status – Purchase

If this is the first workflow created for the e-product, a green bar is added to the left of the **Workflow** menu option, indicating that the e-product now has workflow records.

If you access the e-product's Acquisitions tab, a **Workflow** icon is displayed. This icon indicates that there is a workflow linked to the e-product record.

You use the Workflow work area to work through the defined tasks for the Acquisition workflow. The following diagram illustrates this workflow:

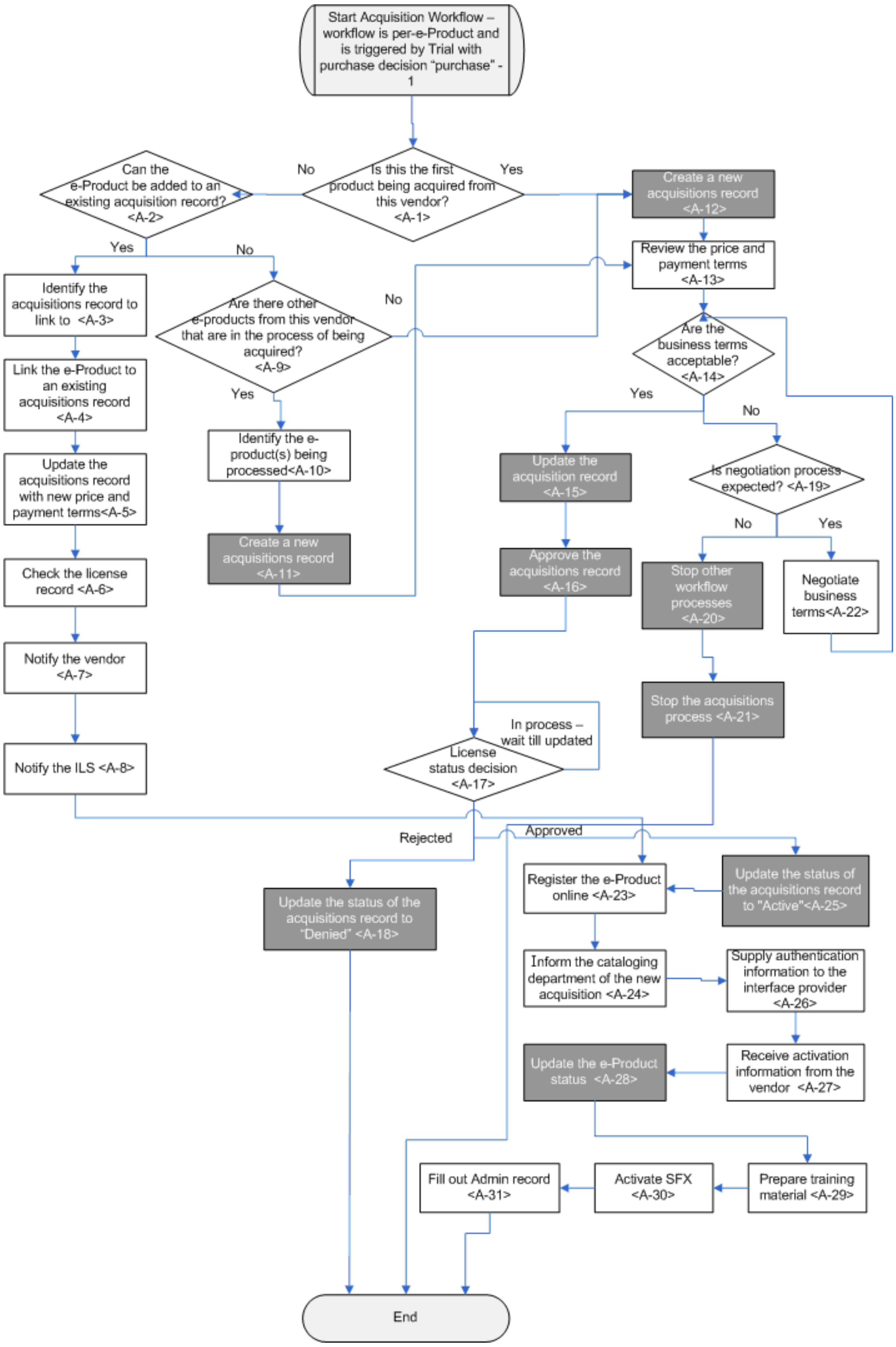

Figure 99: Diagram of Acquisitions Workflow

The following table decribes the tasks that are part of the Acquisitions workflow.

NOTE:
Type indicates whether the task is closed manually, automatically by Verde, or by a decision point.

Table 22. Tasks in Acquisitions Workflow

Task ID	Task Description	Role	Type	Input	Next Task ID	Link
A-1	Determine whether this is the first product that has been ordered from this vendor, by linking to the e-product and reviewing other e-products available from the same interface list	Selector	Decision point	First e-product or not first e-product	Yes – A-12 No – A-2	e-Product
A-2	Determine whether the e-product can be added to an existing acquisition record for the same vendor	Selector	Decision point	Can be or cannot be	Yes – A-3 No – A-9	e-Product
A-3	Locate the acquisition record to which this e-product will be linked. Copy the acquisition no. and input in this task	Acquisitions	Manual	Acquisition number (Verde validates the number) **Done**	A-4	e-Product

Table 22. Tasks in Acquisitions Workflow

Task ID	Task Description	Role	Type	Input	Next Task ID	Link
A-4	Use the Link Acquisitions function in the e-product Acquisitions tab to link the e-product to an existing acquisition record for the same vendor.	Acquisitions	Automatic The task is closed when the acquisition record is linked	None	A-5	Acquisi-tion record
A-5	Update the acquisition record and enter the new price and payment terms agreed to with the vendor	Acquisitions	Manual	Done	A-6	Acquisi-tion record
A-6	Check the license record and see if it needs to be modified	Licensor	Manual	Done	A-7	Acquisi-tion record
A-7	Notify the vendor that a new e-product is being acquired	Acquisitions	Manual	Done	A-8	e-Product
A-8	Notify the ILS about the new product	Selector	Manual	Done	A-23	e-Product
A-9	Can this e-product be processed together with other e-products from the same vendor?	Acquisitions	Manual	Can be processed or cannot be processed	Yes - A-10 No – A-12	e-Product

Table 22. Tasks in Acquisitions Workflow

Task ID	Task Description	Role	Type	Input	Next Task ID	Link
A-10	Identify the e-products for processing. Enter the e-product codes separated by a semi-colon (;)	Selector	Manual	E-Product code(s) (Verde validates the number(s))	A-11	e-Product
A-11	Create a new acquisition record; link the relevant e-products to the record	Acquisitions	Automatic	Linking the acquisition record to the relevant e-products	A-13	Acquisi-tion record
A-12	Create a new acquisition record for the e-product record	Acquisitions	Automatic	Submitting the new acquisition record	A-13	Acquisi-tion record
A-13	Review the price and payment terms that have been negotiated	Acquisitions	Manual	Done	A-14	e-Product
A-14	Review the business terms and decide whether they are acceptable.	Acquisitions	Manual	Yes or No	Yes – A-15 No – A-19	e-Product
A-15	Update the status of the acquisition record to **Ready to be Approved**	Acquisitions	Automatic	The acquisition status must be updated to **Ready to be Approved**	A-16	Acquisi-tion record
A-16	Approve the acquisition record	Acquisitions Manager	Automatic	The task is closed when the acquisition record is updated to **Approved**	A-17	Acquisi-tion record

Table 22. Tasks in Acquisitions Workflow

Task ID	Task Description	Role	Type	Input	Next Task ID	Link
A-17	Check the status of the license record	Acquisitions	Manual	Approved or Rejected	Rejected – A-18 Approved – A-25	License record
A-18	Update the status of the acquisition record to **Denied**	Acquisitions	Manual	Update the acquisition status to **Denied**	End	Acquisi-tion record
A-19	Is progress expected on the outstanding issues that are being negotiated?	Acquisitions	Manual	Progress expected or progress not expected	Progress expected – A-22 Progress not expected – A-20	e-Product
A-20	Stop other workflow processes	Acquisitions	Automatic	This task does not display, but is performed automa-tically by Verde.	A-21	None
A-21	Update the status of the acquisition record to **Denied**; record the reason for not acquiring the e-product	Acquisitions	Automatic	Change the acquisition status to **Denied**	End	Acqusi-tion record
A-22	Continue to negotiate business terms with the vendor	Acquisitions	Manual	Done	A-14	e-Product
A-23	Register the e-product on the vendor's Web site	Selector	Manual	Done	A-24	e-Product

Table 22. Tasks in Acquisitions Workflow

Task ID	Task Description	Role	Type	Input	Next Task ID	Link
A-24	Inform the cataloging department of the new acquisition so they can catalog the new record	Selector	Manual	Done	A-25	
A-25	Update the status of the acquisition record to **Active**	Acquisitions	Automatic	Done	A-23	Acquisi-tion record
A-26	Supply authentication information to the vendor	Selector	Manual	Done	A-27	e-Product
A-27	Pass activation information to the IT department so that access can be set up.	Selector	Manual	Done	A-28	e-Product
A-28	Update the e-product status to **Production**	Selector	Automatic	Change the e-product status to **Production**	A-29	e-Product
A-29	Prepare training material for training staff and end users	Selector	Manual	Done	A-30	e-Product
A-30	Use existing SOAP services to activate SFX. If necessary, link to SFX and set up user name and password	Selector	Manual	Done	A-31	e-Product

Table 22. Tasks in Acquisitions Workflow

Task ID	Task Description	Role	Type	Input	Next Task ID	Link
A-31	Fill out the Verde Admin record, including the section on usage statistics	Selector	Manual	Done	End	e-Product

Review e-Product and Renew Acquisitions Workflows

The **Review e-Product** and **Renew Acquisitions** workflows are run together and comprise two independent, but related steps of the renewal process.

The **Review e-Product** workflow is conducted separately on each of the e-products acquired through the acquisition record that is being considered for renewal. As part of the review process, each e-product is evaluated and a decision is made to approve or reject the e-product for renewal.

The **Renew Acquisitions** workflow involves the decision to renew or cancel the acquisition record. It includes tasks such as checking the number of concurrent users, re-negotiating price and payment terms, and renewing the license or canceling the acquisition record and license. The acquisition renewal process waits until each of the open Review e-Product workflows has been completed before it continues with the task of renewing or canceling the acquisition record.

The Review e-Product and Renew Acquisitions workflows are initiated when the acquisition status is changed to **Review**. This may be done manually or via the **Subscriptions for Review** task (in the KB Tools module).

When the **Subscriptions for Review** task runs, acquisition records that are not defined as **Automatic Renewal** are assigned a status of **Review**. This initiates the **Review e-Product** workflow. For more information on the **Subscriptions for Review** task, see Subscriptions for Review on page 304.

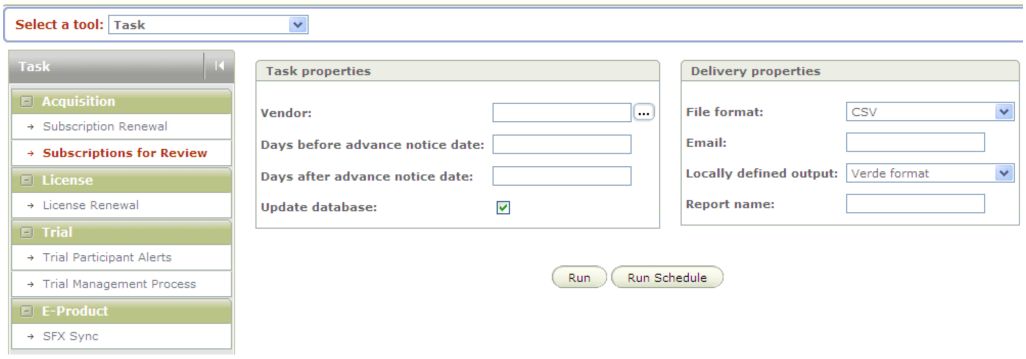

Figure 100: Subscriptions for Review Task

Review e-Product Workflow

The following diagram illustrates the Review e-Product workflow:

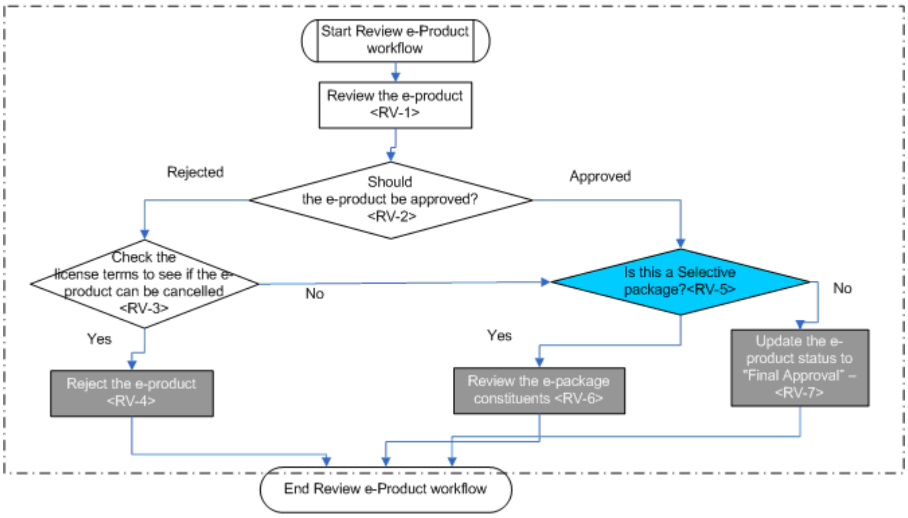

Figure 101: Review e-Product Workflow

The following table decribes the tasks that are part of the Review e-Product workflow.

NOTE:
Type indicates whether the task is closed manually, automatically by Verde, or by a decision point.

Table 23. Tasks in Review e-Product Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RV-1	Review the e-product	Review the e-product; consider the usage and cost data; decide whether the e-product should be renewed.	Selector	Manual	Done	RV-2	e-Product
RV-2	Should the e-product be approved?	Decide whether you want to approve or reject the e-product	Selector	Manual	Reject or Approve	Yes - RV-3 No - RV-5	e-Product
RV-3	Check the license terms to see whether the e-product can be cancelled	Look at the termination obligations section of the license to determine whether the subscription for the e-product can be cancelled and by when it has to be cancelled	Licensor	Manual	Can be cancelled or vannot be cancelled	Yes - RV-4 No - RV-5	e-Product
RV-4	Reject the e-product	Cancel the e-product by assigning the selection status of **Rejected** to the e-product.	Selector	Automatic	Changing the selection status to **Rejected**	End of Review e-Product workflow. Start Acquisitions Renewal workflow	e-Product

Table 23. Tasks in Review e-Product Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RV-5	Is this a selective package?	Is this a selective package?	Selector	Automatic	This task does not display, but is performed automatically by Verde.	Selective package – RV-6 Not selective package – RV-7	e-Product
RV-6	Review the e-package e-constituents	Review the e-package e-constituents and decide which ones to include in next year's subscription.	Selector	Automatic	The task is closed when the e-package is updated to **Final Approval**	End of Review e-Product workflow. Start Acquisitions Renewal workflow.	e-Product
RV-7	Update the e-product status to **Final Approval**	Update the e-product status to **Final Approval**	Selector	Automatic	The task is closed when the e-package is updated to **Final Approval**	End	e-Product

Renew Acquisitions Workflow

The following diagram illustrates the Renew Acquisitions workflow:

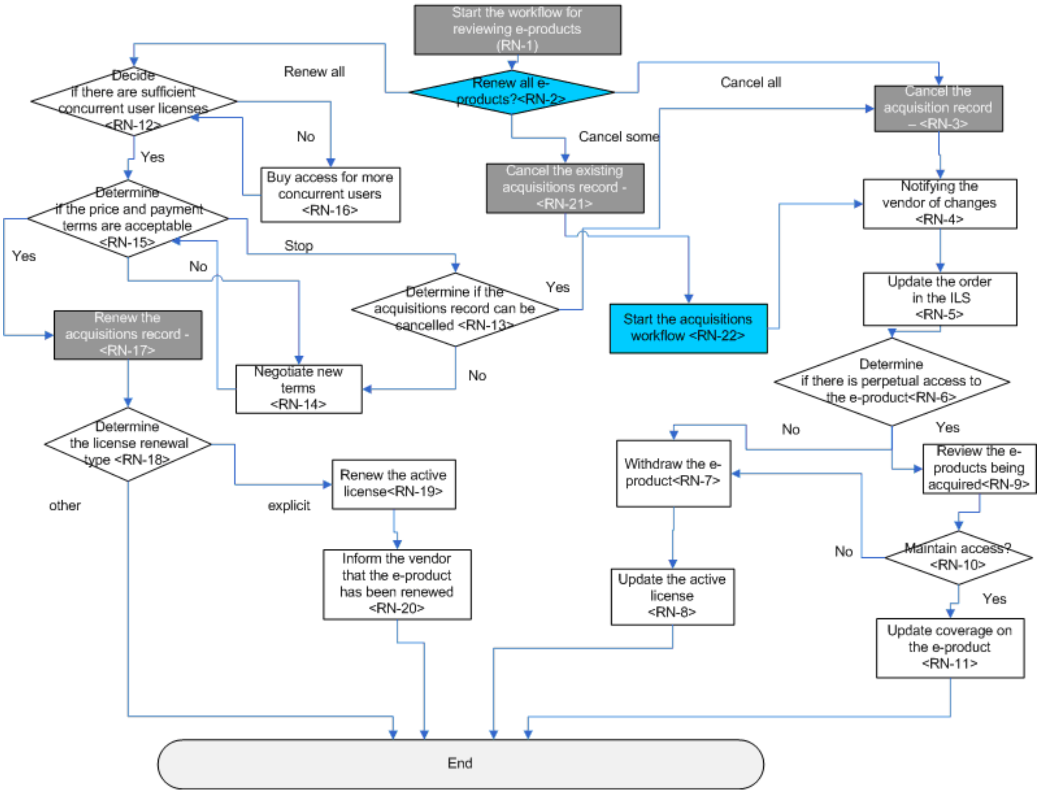

Figure 102: Renew Acquisitions Workflow

The following table decribes the tasks that are part of the Renew Acquisitions workflow.

NOTE:
Type indicates whether the task is closed manually, automatically by Verde, or by a decision point.

Table 24. Tasks in Renew Acquisitions Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RN-1	Review e-Products workflow underway	All e-products acquired through this acquisition record are being reviewed. The task ends automatically when all the review workflows are complete.		Automatic	The task is closed when all the related e-products are assigned the status **Rejected** or **Final Approval**	RN-2	e-Product
RN-2	Renew all e-products?	This task does not display		Automatic	This task does not display. It is performed automatically by the system	Cancel All – RN-3 Cancel Some – RN-21 Renew All – RN-12	Acqui-sitions
RN-3	Cancel the acquisition record	Update the acquisition record to **Cancelled**.	Acqui-sitions	Automatic	The task is closed when the acquisition status is updated to **Cancelled**	RN-4	Acquisi tions
RN-4	Notifying the vendor of cancellation	Notify the vendor that the subscription has been cancelled.	Acqui-sitions	Manual	Done	RN-5	Acqui-sitions

Table 24. Tasks in Renew Acquisitions Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RN-5	Update the order in the ILS	Update the status of the order/ acquisitios record in the ILS to **Cancelled**	Acqui-sitions	Manual	Done	RN-6	Acqui-sitions
RN-6	Check whether there is perpetual access to the e-product	Check the license terms to see whether there is perpetual access to the e-product	Licensor	Manual	Perpetual access or no perpetual access	Yes – RN-9 No – RN-7	License
RN-7	Withdraw the e-product	Update all related e-products by assigning an **Activation to** date	Selector	Manual	Done	RN-8	Acqui-sitions
RN-8	Update the active license	Update the active license	Licensor	Manual	Done	End	License
RN-9	Check the e-product in order to decide whether access to the e-product should be maintained	Decide whether access to the e-product should be maintained even though the e-product is not currently received.	Selector	Manual		RN-10	Acqui-sitions
RN-10	Maintain access?	Maintain access to the e-product for the years that are available under the perpetual access agreement.	Selector	Manual	Yes or No	Yes – RN-11 No – RN-7	Acqui-sitions

Table 24. Tasks in Renew Acquisitions Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RN-11	Update coverage on the e-product	Update coverage on the e-product so that it shows only those years that are available.	Selector	Manual	Done	End	Acqui-sitions
RN-12	Decide whether sufficient concurrent users have been purchased through the acquisition record	Check the usage statistics and the incident log and determine whether there are enough concurrent user licenses	Selector	Manual	Yes or No	Yes – RN-15 No – RN-16	
RN-13	Determine whether the acquisition record can be cancelled	Check the termination obligations section of the license to confirm that the acquisition record can be cancelled	Acqui-sitions	Manual	Yes or No	Yes – RN-3 No – RN-14	License
RN-14	Negotiate new terms	Negotiate new terms with the vendor	Acqui-sitions	Manual	Done	RN-15	Acqui-sitions
RN-15	Determine whether the price and payment terms are acceptable	Get approval for the price and payment terms	Acqui-sitions Manager	Manual	Yes, No, Stop	Yes – RN-17 No – RN-14 Stop – RN-13	Acqui-sitions
RN-16	Buy access for more concurrent users	Purchase access for more concurrent users. Update the acquisition record to reflect the change.	Acqui-sitions	Manual	Done	RN-15	Acqui-sitions

Table 24. Tasks in Renew Acquisitions Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RN-17	Renew the acquisition record	Link to the acquisition record and renew it using the renew function that displays above the acquisition details screen	Acqui-sitions	Automatic	The task is closed when the acquisition status is updated to **Renewed**.	RN-18	Acqui-sitions
RN-18	Determine the license renewal type	Identify the appropriate license and determine the license renewal type: Is it explicit or not?	Licensor	Manual	Explicit Not Explicit No license defined	Explicit – RN-19 Other – End	License
RN-19	Renew the active license	Manually renew the active license using the renew function that displays above the license details screen.	Licensor	Manual	Done	RN-20	License
RN-20	Inform the vendor/ licensor that the acquisition and license records have been renewed	Contact the vendor and the licensor and inform them that the acquisition record and license record have both been renewed.	Acquis-itions	Manual	Done	End	Acqui-sitions

Table 24. Tasks in Renew Acquisitions Workflow

Task ID	Task Name	Task Description	Role	Type	Input	Next Task ID	Link
RN-21	Cancel the existing acquisition record	Cancel the existing acquisition record by updating the status of the record to **Cancelled**. Acquisitions workflows start for all approved e-products.	Acqui-sitions	Automatic	The task is closed when the acquisition status is updated to **Cancelled**.	RN-22	Acqui-sitions
RN-22	Start the Acquisitions workflow	Start the Acquisitions workflow	Acqui-sitions		This task does not display, but is performed automatically by Verde.	RN-4	Acqui-sitions

NOTE:
Tasks RN-4 and RN-5 are triggered simultaneously and either one can be handled first.

17

Organization Management

This section includes:

- **About Organization Management** on page **229**
- **Viewing the Organization List** on page **230**
- **Organization Details** on page **231**

About Organization Management

In addition to e-products, Verde has two other entities: **Organizations** and **Libraries**.

Organization records are created for the various external organizations that the library communicates with in the course of managing electronic resources that vendors and e-interfaces provide. An organization record can be of one of the following types:

- a consortium member
- a consortium
- an interface provider
- a licensing agent
- a licensor
- a vendor

An organization's role determines its relationship with an e-product. For example, the organization type **Interface provider** is generally associated with an e-interface. Each organization can have multiple roles.

Each organization also has several contacts. A contact is a person who has one or more of the following roles:

- Technical support
- Account manager

- Sales representative
- License contact
- Trial contact
- Consortium contact
- Other

Organizations are used in the following Verde areas:

- e-Interfaces, associated with the organization type **Interface provider**.
- Acquisition records, associated with the organization type **Vendor**.
- License records, associated with the organization types **Licensing agent** and **Licensee**.

NOTE:
Organizations existing in one instance cannot be viewed by other instances in the consortium. If member instances in a consortium work with the same list of organizations, it is possible to create one organization input file and load it using the organization loader in each instance. For more information about the organization loader, see **About Organization Input Files** on page **425**.

Viewing the Organization List

From the **Managing** drop-down list, select **Organizations**. A list of organizations is displayed.

The organization list is sorted alphabetically by organization name. An organization has one main name and may have several alternate names. Each version of the name appears in the list. To access a particular organization within a long list of organizations, use the **Jump to** option that appears above the list.

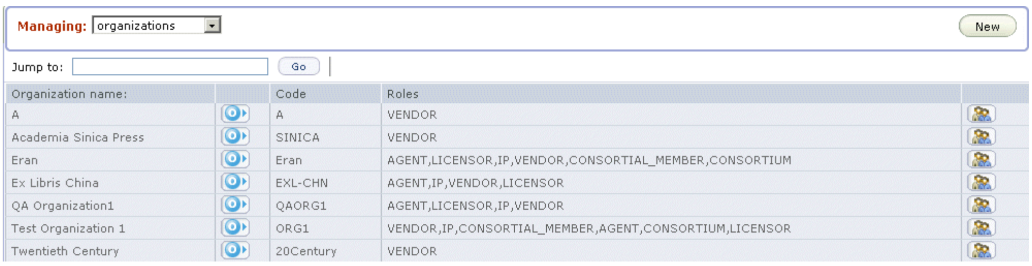

Figure 103: Organization List

The organization list displays the following information:

- the name of the organization
- the **Open Organization** button (enabling you to open the organization record)
- the organization's code
- the organization's role
- the **Contacts** button (opens the organization record's Contacts tab)

To create a new organization, click the **New** button in the top right-hand corner of the screen. To edit the details of an existing organization, click the **Open Organization** button of the record you want to edit. The organization record's Details tab opens.

NOTE:
Organizations that are being used cannot be deleted.

Organization Details

The organization details screen consists of two tabs:

- Details
- Contacts

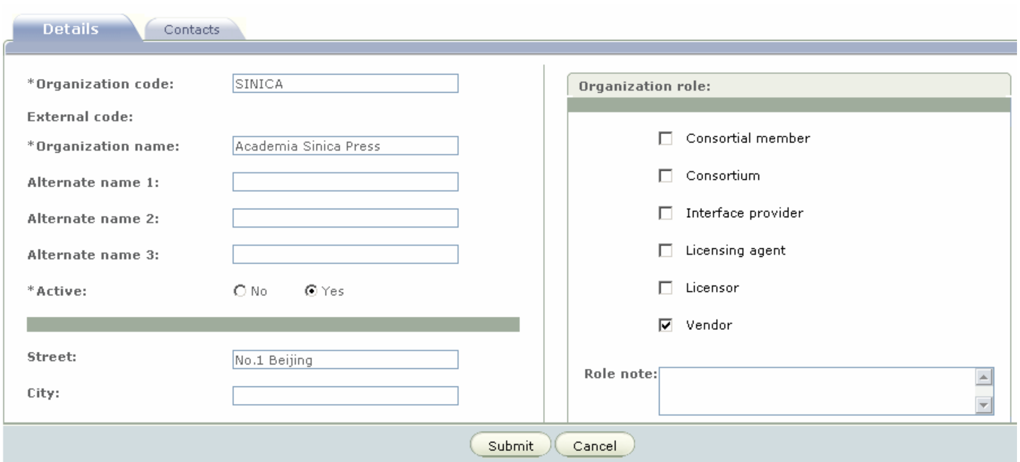

Figure 104: Organization Details

Details Tab

When creating a new organization record, the following fields are mandatory:

- **Organization code** – The following characters can be used for organization code: a-z, A-Z, 1-10, _ (underscore). The organization code is unique across organizations and libraries within an instance. Thus, if organization A with organization code X exists in a certain instance, another organization with organization code X or library with library code X cannot be created in this instance.
- **External code** – This field is displayed as read-only for organizations that are vendors and have a different code in an external system that interacts with Verde. All characters are legal in the external code field.
- **Organization name**
- **Active** (Yes or No)

You may choose whether you want to complete the other fields or leave them blank.

The following organization roles can be defined:

- Consortial member
- Consortium
- Interface provider
- Licensing agent
- Licensor
- Vendor

More than one role can be assigned. If you leave this section blank, the system assigns a default role of **Vendor** to the organization.

Contacts Tab

Any number of contacts can be defined for each organization.

Each contact can have one or more roles. Alternatively, there can be one or more contacts with the same role.

The following organization roles are available:

- Technical support
- Account manager
- Sales representative
- License contact
- Trial contact

- Consortial contact
- Other

To add a new contact, click the **Add Contact** button. The contact name and e-mail address are mandatory fields. Other fields can either be completed or left blank. If no role is selected, the role **Other** is assigned by default.

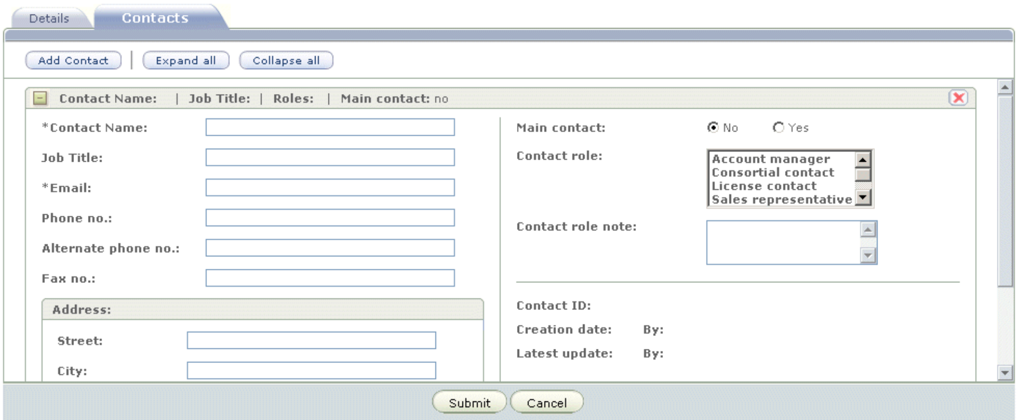

Figure 105: Add Contact

Only one contact can be defined as the main contact. If you try and create more than one record with the **Main contact** field defined as **Yes**, you receive an error message and the second record is not updated. In addition, main contact records cannot be deleted. To delete such records, you must first set the **Main contact** field to **No**.

Note the option to expand or collapse all contact details. If you click **Expand All**, you can edit all of the contact records one after the other. Alternatively, you can click the + (plus) button to the left of a specific record to edit this record only.

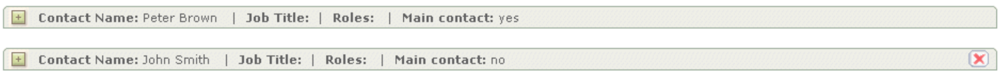

Figure 106: Collapsed Contact Records

18

Library Management

This section includes:

- **About Library Management** on page **235**
- **Viewing the Library List** on page **236**
- **Library Details** on page **236**

About Library Management

Verde libraries represent different administrative units within the Verde installation, enabling Verde to support various organizational structures, including a consortium.

In single instances, there are two levels of libraries:

- Instance – The instance is the highest level. Every Verde instance has its own view of the Verde database and is independent in terms of e-product management.
- Institution – A single instance can support one or more institutions. All institutions within one instance share the e-products and key attributes such as acquisition, license, trial, access, and admin records. Local acquisition, cost, and usage records can be created at the institution level. In addition, it is possible to record resource access authorization information at the institution level (that is, whether or not the institution may access specific resources).

Viewing the Library List

From the **Managing** drop-down list, select **Libraries**. A list of libraries is displayed.

The library list is sorted alphabetically by library name. To access a particular library within a long list of organizations, use the **Jump to** option that appears above the list.

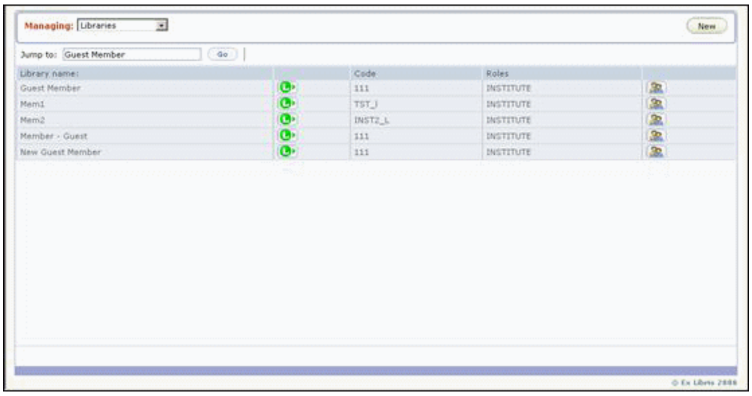

Figure 107: Library List

The library list displays the following information:

- the name of the library
- the **Open Library** button (enabling you to open the library record)
- the library's code
- the library's role – Institute or Instance
- the **Contacts** button (opens the library record's Contacts tab)

To create a new library, click the **New** button in the top right-hand corner of the screen. To edit the details of an existing library, click the **Open Library** button  of the record you want to edit. The library record's Details tab opens.

Library Details

The Library Details screen consists of four tabs:

- Details
- Contacts
- IP Lists
- Proxy Server

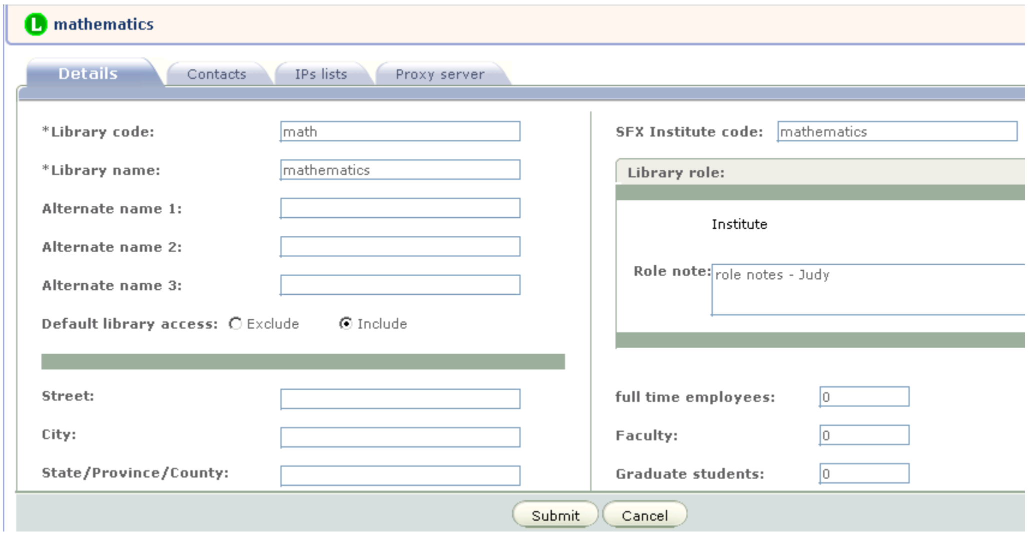

Figure 108: Library List – Details Tab

Details Tab

When creating a new library record the following fields are mandatory:

- **Library code** – The library code must be unique across all library types. An institute and instance, therefore, cannot share the same code. In addition, the library code must be unique within the installation. Thus, if a library exists in one instance, another library with the same library code cannot be created in a different instance. Similarly, Verde does not allow you to create a library whose library code is the same as the organization code of an organization that exists in the same instance. Thus, if an organization with an organization code X exists in an instance, a library with the library code X cannot be created in this instance.
- **Library name**
- **Role**

For sites that want to synchronize Verde and SFX, the following additional fields are mandatory:

- SFX institute code – for an institute record
- SFX instance code – forn an instance record

Verde instances interact with SFX instances and Verde institutes interact with SFX institutes. Verde does not interact with SFX groups.

When working in a multi-instance shared environment, there are two additional mandatory fields in the central instance:

- **Guest member** – This is a member for which the center manages resources. The guest member does not have Verde instances of its own. The default for this field is **No**. For more information about guest members, see **Setting Up Guest Profiles** on page **577**.

- **Related instance**

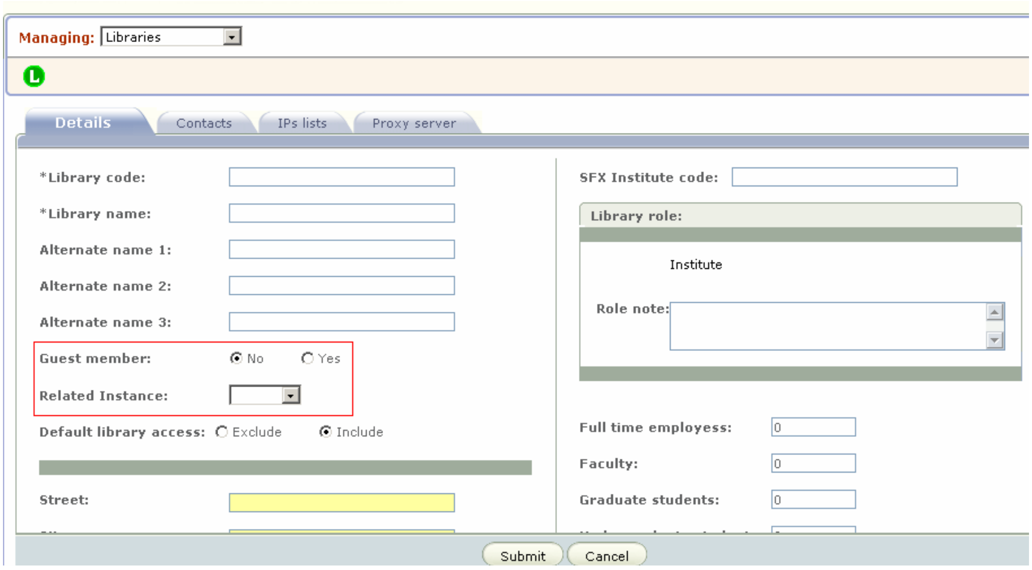

Figure 109: Library List Details – Mandatory Fields

NOTE:
Library records that are being used cannot be deleted.

Contacts Tab

Any number of contacts can be defined for each library.

Each contact can have one or more roles. Alternatively, there can be one or more contacts with the same role.

The following library roles are available:

- e-Product sponsor
- Selector
- Donor
- e-Product ACQ contact
- e-Product license contact
- e-Product access contact
- Purchase partner contact
- SFX
- MetaLib

- Other
- ILS Acquisition
- ILS Cataloging

To add a new contact, click the **Add Contact** button. The contact name and e-mail address are mandatory fields. Other fields can either be completed or left blank. If no role is selected, the role **Other** is assigned by default.

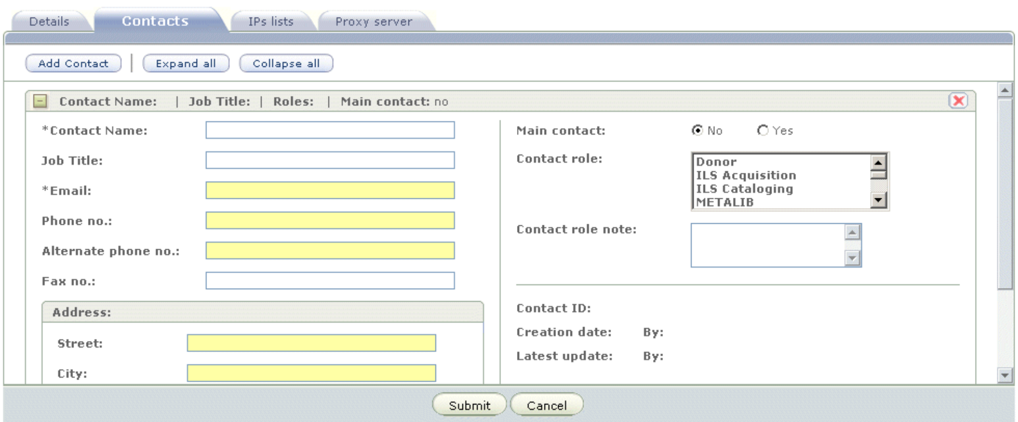

Figure 110: Library Contacts

Only one contact can be defined as the main contact. If you try and create more than one record with the **Main contact** field defined as **Yes**, you receive an error message and the second record is not updated. In addition, main contact records cannot be deleted. To delete such records, you must first set the **Main contact** field to **No**.

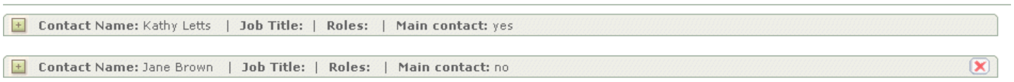

Figure 111: Setting Main Contact Field to No

Note the option to expand or collapse all contact details. If you click **Expand All**, you can edit all of the contact records one after the other. Alternatively, you can click the + (plus) button to the left of a specific record to edit this record only.

IP Lists Tab

The **IP Lists** tab stores IP list ranges for use by access management devices and systems.

Any number of internal ranges and IP ranges can be added for a vendor. These ranges can be edited at any time. Use the **Add Range** button to add new ranges. IP ranges can be entered in a single column using the – and * characters. IP ranges can be included or excluded. By default, they are included.

IP ranges can be added in the following formats:

- a range using the **From** and **To** columns:

  `176.168.1.1  176.168.1.100`

- a range using the **From** column only:

  `176.168.1.1-76`

  `172.168.1.*`

  `172.168.1-10.*`

  `172.168.*.*`

IP ranges are sorted in ascending order.

A **Note** field can be added, as in the following example.

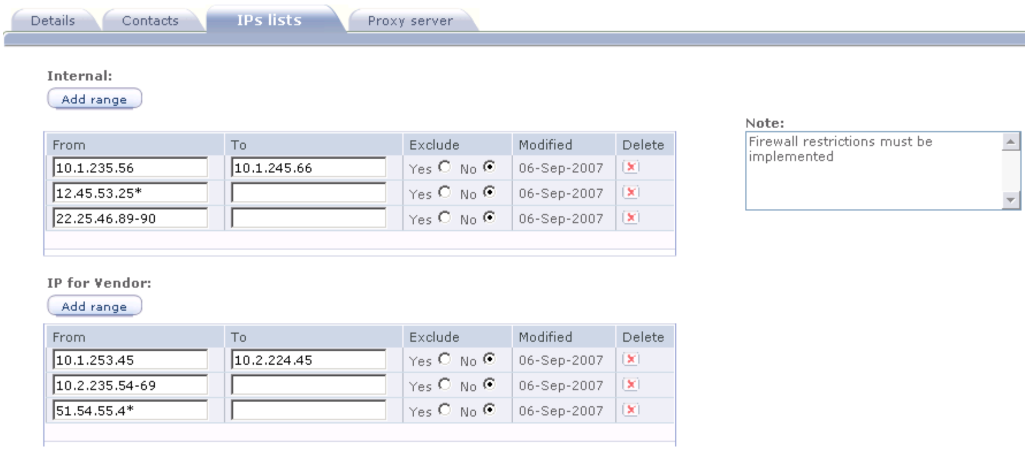

Figure 112: IPs Lists

Proxy Server Tab

The **Proxy Server** tab includes the following fields related to proxy server definitions:

- Proxy Server Use option – indicates the use of a proxy server. The possible values are as follows:
  - Null – Field left blank
  - IP Selective – Indicates selective use of the proxy server, according to IP address
  - No – No proxy server is used
  - Selective – Indicates selective use of the proxy server
  - Yes – A proxy server is used

- Proxy server type – the type of a proxy server usedif a proxy server is used. The possible values are as follows:
  - Null – Field left blank
  - EZ proxy - The EZ proxy is used
  - Library proxy – The library proxy is used
  - Other – Another proxy type is used
  - SQUID – SQUID is used
  - WAM – WAM is used
- Proxy Prepend string – a string to be added to the URL sent to the proxy server.
- Note – Additional information regarding the library's proxy server

Part III

KB Tools Module

Part III contains the following:

- Section 19: Introducing the KB Tools Module on page 245
- Section 20: Reports on page 249
- Section 21: View Report Output on page 269
- Section 22: Customized Report Outputs on page 293
- Section 23: Tasks on page 301
- Section 24: View Task Output on page 309
- Section 25: Overview of Loaders on page 315
- Section 26: e-Constituent Input Files on page 327
- Section 27: e-Standalone Input Files on page 345
- Section 28: Acquisition Input Files on page 365
- Section 29: License Input Files on page 375
- Section 30: Library, Library Contact, and Library IP Input Files on page 413
- Section 31: Organization and Organization Contact Input Files on page 425
- Section 32: Admin and Local Admin Input Files on page 435
- Section 33: Access and Access Authorization Input Files on page 447
- Section 34: View Loader Output on page 465
- Section 35: Transferring Local Data on page 471
- Section 36: View KB Reports and Scheduled Reports/Tasks on page 483

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Introducing the KB Tools Module

The KB Tools module contains tools for running reports, performing tasks, and loading and transferring data. All the KB tools are run in offline mode.

You can run reports or tasks once, as a single instance, or you can use the scheduler to define a recurrence pattern and range in order to run reports and tasks at a later time.

To access KB Tools, in the top toolbar, click **KB Tools**.

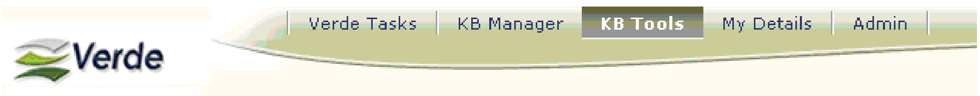

Figure 113: KB Tools

The KB Tools module includes the following tools:

- Report – enables you to submit a report
- Task – enables you to submit a task
- Loader – enables you to submit a loader
- View Loader Output – enables you to view the output of a specific loader
- View Report Output – enables you to view a specific report
- View Task Output – enables you to view the output of a specific task
- View KB Reports – enables you to view all KB reports
- Transfer Local Data – enables you to transfer data from a locally created e-product to its matching globally created e-product
- Scheduled Reports/Tasks – enables you to view, edit, and delete scheduled tasks and reports
- SFX Sync History – enables you to manage the synchronization status of the e-products in your instance. For more information, see **Monitoring Synchronization History** on page **632**.
- SFX Sync - To Be Synced – enables you to display a list of e-packages and e-standalones that currently require synchronization with SFX. For more

information, see **Checking Which e-Products Require Synchronization** on page **637**.

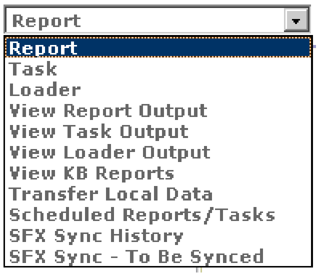

Figure 114: Select a KB Tool

All the KB Tools module menus can be collapsed or expanded by clicking the plus (+) or minus (-) signs next to the relevant header. The menus are expanded by default.

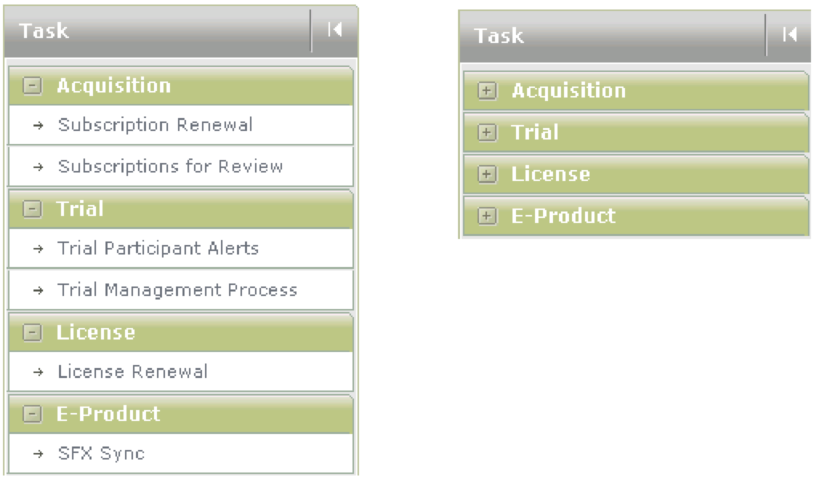

Figure 115: Expanded and Collapsed KB Tools Menu

Delivery and Scheduling Properties

The following table describes the available KB tool delivery output options:

Table 25. Delivery Output Properties

Property	Description/Explanation
File format	The following options are available: ■ CSV ■ PRN ■ XML

Table 25. Delivery Output Properties

Property	Description/Explanation
E-mail	The output can be sent by e-mail as well. To define multiple recipients, use semicolons between e-mail addresses.
Locally defined output	You can select a customized format. Note that the default is **Verde format**.
Report name	The name of the report. Note that this field is not mandatory.

Reports and tasks can be scheduled. The following scheduling options are available:

- Start time (hh:mm)
- Recurrence pattern (daily, weekly, or monthly, with the additional option of defining whether tasks/reports should be run over weekends)
- Range of recurrence (the start and end dates of recurring runs—for example, if you want to run a task/report daily for the next two weeks)

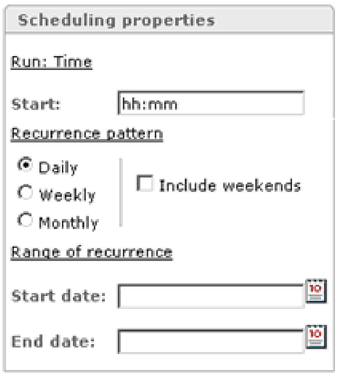

Figure 116: Scheduling Properties

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Reports

This section includes:

- General Report of e-Products on page 249
- Report e-Products by Selection Status on page 260
- Report on e-Packages with Acquisitions on page 261
- Report on Locally Created e-Products on page 262
- Report on e-Product with Usage Statistics on page 263
- Report of Active e-Products Without Licenses on page 264
- Report of IP Ranges by Licensor on page 266

General Report of e-Products

This is a generic report that includes most of the fields related to e-products. The report includes the following sections:

- e-Product
- Acquisition
  - Local Acquisition
  - Invoice
- License
- Access
- e-Product libraries

You can select filters from one or more sections. The report retrieves the e-products that meet the criteria of all the selected filters.

In addition, the local fields defined by the Verde administrator (per instance) for e-product records or certain e-product attribute records whose data appears in this report, are displayed in the report in the following sections:

- e-Product Local Fields
- Acquisitions Local Fields
- License Local Fields
- Access Local Fields

Local fields of both **Note** and **Value** type are displayed and may be used for filtering. The maximum number of characters that can be inserted into this report for each field is 50. If no fields are defined for an e-product attribute record, the message **No local fields are configured for this attribute** appears in the appropriate section.

NOTE:
It is strongly recommended that you not submit this report without selecting any parameters, especially if the report is scheduled to run on a daily basis. If you do so, the entire KnowledgeBase is retrieved, which is both time- and memory-consuming.

The first part of this report offers the option of filtering the output by:

- **Instances** (available in consortium environments only) – Note that only the instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by**
- **View Full Package Content** – If the user selects this option, the output file includes packages that match the retrieval parameters and all the e-constituents that belong to the package, even if the e-constituents do not match the retrieval parameters. If **View Full Package Content** is not selected, the output file includes packages that match the retrieval parameters, but only the e-constituents that match the retrieval parameters are included in the output.

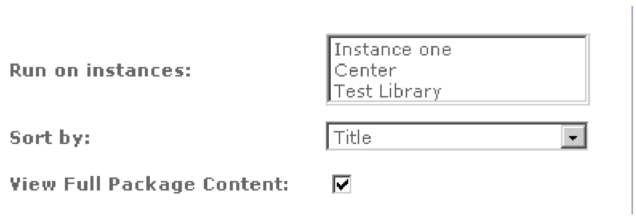


Figure 117: Reports – Filtering the Output

The second part allows for defining parameters related to the e-product.

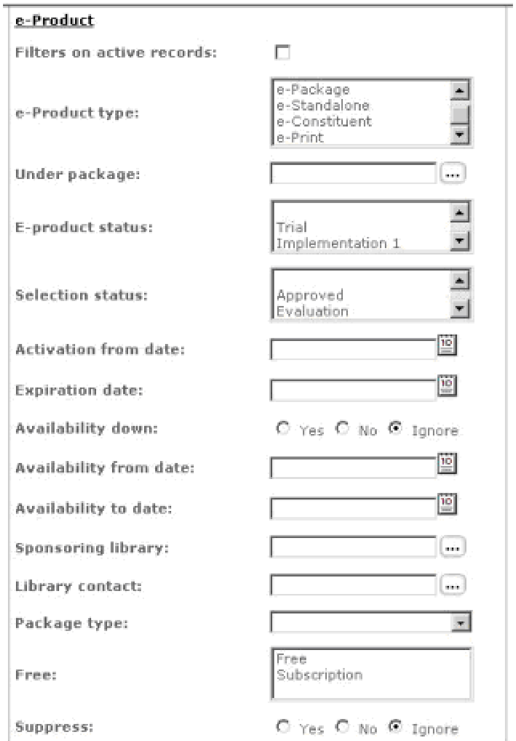


Figure 118: Reports – Defining e-Product Parameters

The available fields are:

- **Filters on active records –** An e-product is considered active if it has an e-product status that is not **Withdrawn**, and if the current date is greater than the active from date and smaller than the expiration date.
- **e-Product type** - Select one or more e-product types to retrieve. The possible options are:
  - e-Interface
  - e-Package
  - e-Standalone
  - e-Constituent
  - e-Print
- **Under package –** You can limit your report to set of e-constituents that are related to one specific package. Clicking the ellipsis on the right side of the

field activates a pop-up window displaying a list of all Verde e-packages. Select the required e-package from the list.

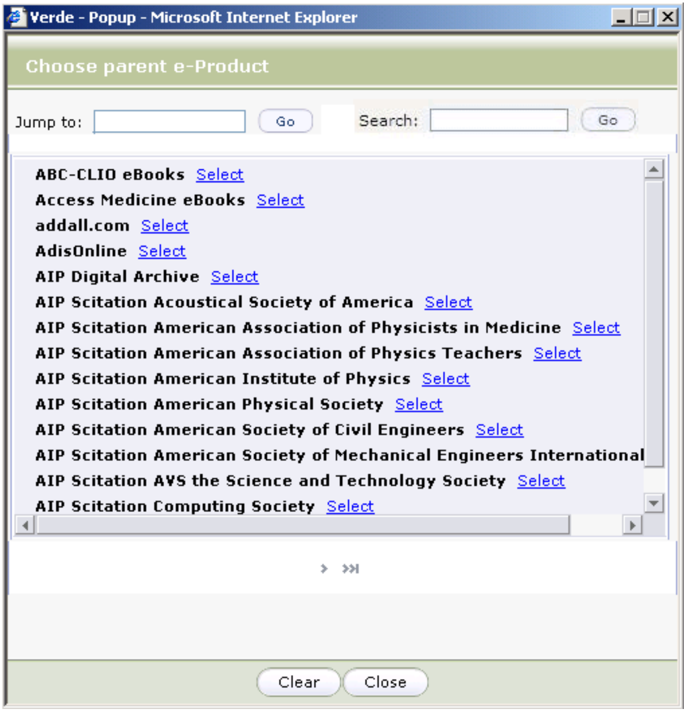


Figure 119: Reports – Under Package Parameter

- **e-product status –** Possible values are:
  - Trial
  - Implementation 1, 2, and 3
  - Production
  - Withdrawn
- **Selection status**. Values are:
  - Evaluation
  - Review
  - Approved
  - Final approval
  - Rejected
  - Withdrawn by publisher
- **Activation from date** – the report retrieves e-products with an activation from date equal or greater than the selected date.
- **Expiration date** – the report retrieves e-products with an expiration date equal or less than the selected date.

- **Availability down** – yes/no/ignore. This relates to the flag that signifies if the e-product is available or not. You can choose to retrieve by, or ignore this flag.
- **Availability from date** – Date from which the e-product is available.
- **Availability to date** – Date until which the e-product are available.
- **Sponsoring library** – The library that sponsored the e-product. Note that clicking the ellipsis on the right side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.

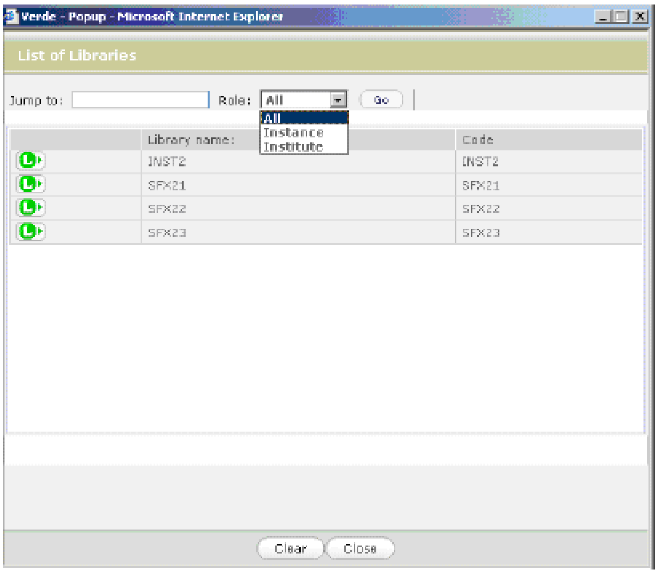


Figure 120: Reports – Sponsoring Libraries

- **Library contact**. Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with filter option by role.
- **Package type** - aggregator or selective.
- **Free** - is the resource available free of charge or is it a paid subscription.
- **Suppress yes/no/ignore**. Flag that indicates if the e-product is hidden from Public View.
- **Cross ref enabled yes/no/ignore**

The next part of the report input deals with parameters related to acquisitions:

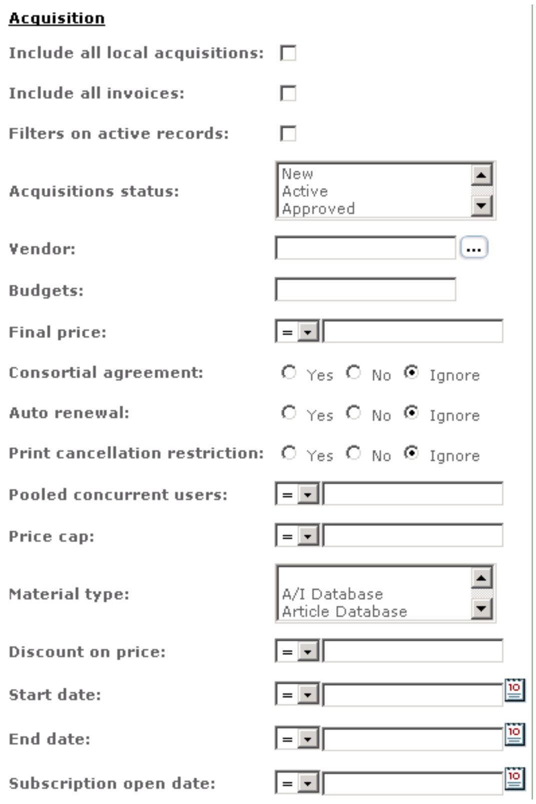


Figure 121: Reports – Defining Acquisition Parameters

The available fields are:

- **Include all local acquisitions** – Select this option if you want to print all local acquisitions related to a specific acquisition record. To define acquisition parameters, select the appropriate filters in the **Acquisition** section. If you want to print separate local acquisition records, select the appropriate parameters in the **Local Acquisition** section.
- **Include all invoices** – Select this option if you want to print all invoices related to a specific acquisition record. To define acquisition parameters, select the appropriate filters in the **Acquisition** section. If you want to print separate invoice records, select the appropriate parameters in the **Invoice** section.
- **Filters on active records –** An acquisition record is active if it has a status that is **Active** or **Renewed** and if the current date falls between the start and end dates**.**
- **Acquisitions status**. Possible (default values) are:
  - New
  - In Process 1

  - In Process 2
  - In Process 3
  - Approved
  - Denied
  - Sent for Additional Processing
  - On Hold
  - Active
  - Renewed
  - Cancelled
- **Vendor** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with filter option by role.
- **Final price** – final price of the subscription. This can be defined as:
  - = equal to
  - > less than
  - < more than
- **Consortial agreement**: yes/no/ignore – If the acquisition record is consortial.
- **Auto renewal**: yes/no/ignore – The flag that controls renewal.
- **Print cancellation restriction**: yes/no/ignore – Contractual restrictions on canceling subscriptions for print versions of journals contained in the package.
- **Pooled concurrent users** – Can be defined as equal to, less than, or more than. This defines the number of concurrent users being purchased. It may be spread across one or more e-products.
- **Price cap**: equal to, less than or more than. This is the amount by which the price can rise.
- **Material type**
- **Discount on price** – Can be defined as equal to, less than, or more than. It is the percentage discount negotiated with the vendor.
- **Start and end dates –** The start and end dates of the annual subscription. Can be defined as equal to, less than, or more than.
- **Subscription open date -** Can be defined as equal to, less than, or more than.

The next part of the report input deals with parameters related to local acquisitions:

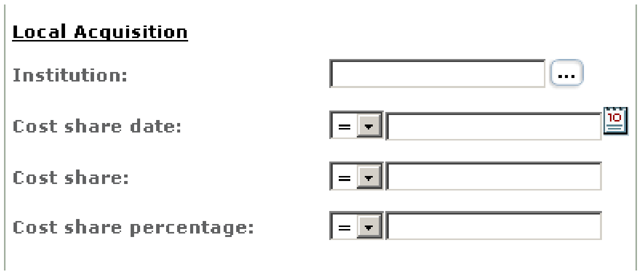


Figure 122: Reports – Defining Local Acquisition Parameters

The available fields are:

- **Institution** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of libraries with filter option by role.
- **Cost share date** – Can be defined as equal to, less than, or more than.
- **Cost share** – The amount that the institution is paying for the e-product.
- **Cost share percentage** – The percentage amount that the institution is paying for the e-product.

The following part of the report input deals with parameters related to invoices:

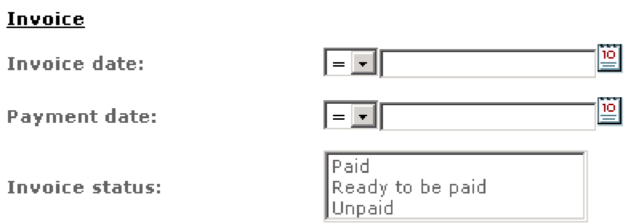


Figure 180. Reports – Defining Invoice Parameters

The available fields are:

- **Invoice date** – Can be defined as equal to, less than, or more than.
- **Payment date** – Can be defined as equal to, less than, or more than.
- **Invoice status** – Possible values are:
  - Paid
  - Ready to be paid
  - Unpaid

The next part of the report input deals with parameters related to the license:

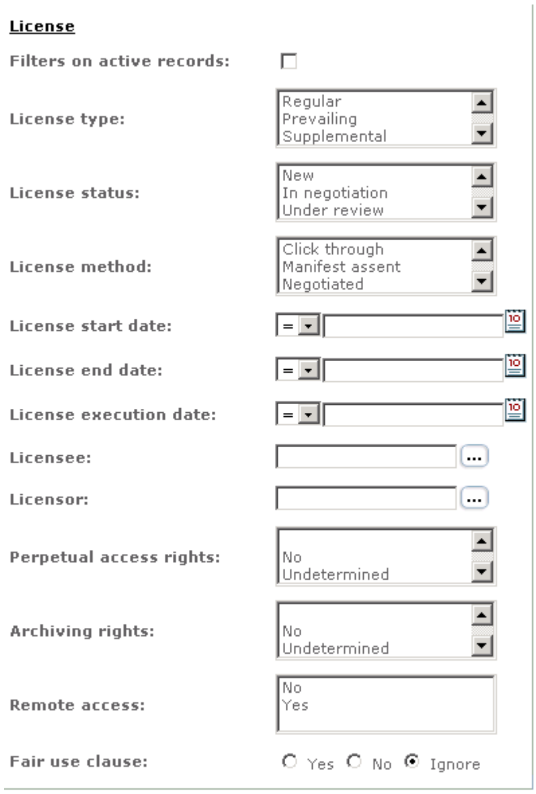


Figure 123: Reports – Defining License Parameters

The available fields are:

- **Filters on active records –** if the box is selected, only licenses that have the status **Approved** will be retrieved.
- **License type**. Possible values are:
  - Regular
  - Trial
  - Supplemental
  - Prevailing
- **License status**. Values are:
  - New
  - In negotiation
  - Under review
  - Under local review
  - Pending local response
  - Pending licensor response

  - Awaiting vendor generic license
  - Redacted version created
  - Electronic version created
  - Awaiting local signature
  - Final legal version received
  - Approved
  - Pending final local signature
  - Retired
  - Pending final signature by licensor
  - Approved locally
  - Rejected
- **License method**. Values are:
  - Negotiated
  - Click through
  - Online
  - Manifest Assent
  - Shrinkwrap
- **License start and end dates** - Can be defined as equal to, less than or more than. These are the dates on which the license becomes active or expires.
- **License execution date** – Can be defined as equal to, less than or more than. Date on which the license was executed.
- **Licensee** – Clicking the ellipsis on the right side of the field activates a pop-up window of libraries (licensees) with filter option by role.
- **Licensor** – Clicking the ellipsis on the right side of the field activates a pop-up window of organizations (licensors) with filter option by role.
- **Perpetual access rights**. Options are:
  - Yes
  - No
  - Undetermined
  - Types 1-3
- **Archiving rights**. Options are:
  - Yes
  - No
  - Undetermined

    - Types 1-3
- **Remote access**. Options are:
    - Yes
    - No
- **Fair use clause** – yes/no/ignore.

The last part of the report input deals with parameters related to access:

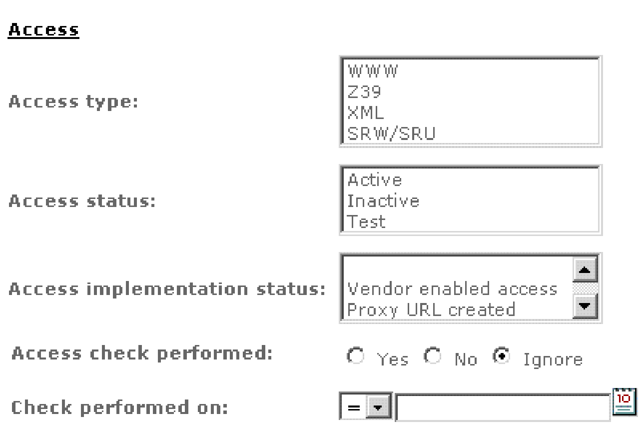


Figure 124: Reports - Defining Access Parameters

The available fields are:

- **Access type**. Possible values are:
    - WWW
    - Z39
    - XML
    - SRW/SRU
- **Access status**. Possible values are:
    - Active
    - Inactive
    - Test
- **Access implementation status**. Relevant only for the WWW access type. Possible values are:
    - Vendor enabled access
    - Proxy URL created
    - Synced in SFX
    - Cataloged in OPAC

- Statuses 1 -3

- **Access check performed**. Indicates whether an access check was performed. Relevant only for the WWW access type. Possible values are:
  - Yes
  - No
  - Ignore
- **Check performed on**. The date on which the access check was performed. Relevant only for the WWW access type. Can be defined as equals to, less than, or more than.

After filling in the relevant parameters, choose the delivery and scheduling options as described in **Delivery and Scheduling Properties** on page **246**.

Report e-Products by Selection Status

This report retrieves e-products by selection status.

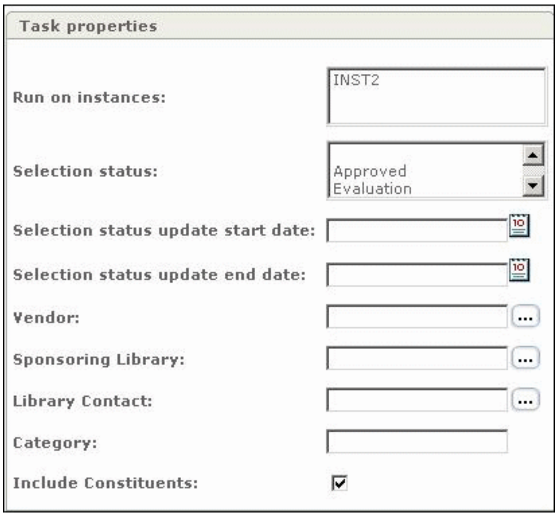


Figure 125: Report e-Product by Selection Status

Retrieval is based on the following parameters:

- **Instances** (available in consortium environment only) – Only instances in which the user was granted permission to run the report are displayed in the report form.
- **Selection status –** Values are:
  - Approved
  - Evaluation
  - Final Approval

- Rejected
- Review
- Withdrawn by publisher

- **Selection status update start date** – The system retrieves e-products whose selection status was updated starting from this date.
- **Selection status update end date** – The system retrieves e-products whose selection status was updated ending with this date.
- **Vendor** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with filter option by role.
- **Sponsoring library** – The library that sponsored the e-product. Clicking the ellipsis on the right side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.
- **Library contact.** Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with filter option by role.
- **Category**
- **Include constituents**

Report on e-Packages with Acquisitions

This report retrieves e-packages that have acquisition information.

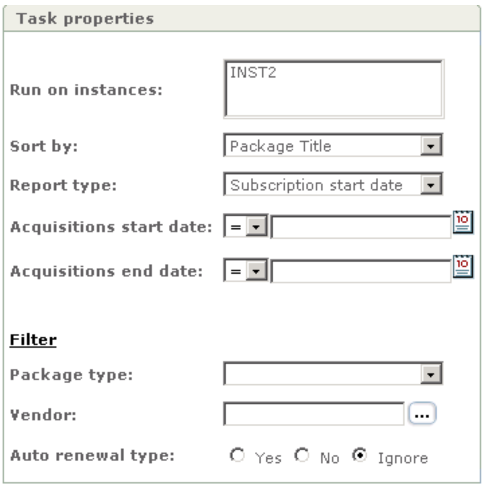


Figure 126: Report on e-Packages with Acquisitions

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by**. Options are:
  - Package title
  - Date
- **Report type**:
  - Subscription start date
  - Subscription end date
  - Renewal date
- **Acquisitions start and end dates** – Can be defined as equal to, less than, or more than. If user leaves the start date blank, the "start date" input parameter is automatically filled in with today's date minus 30 days.

You can filter the report by the following:

- **Package type**:
  - Aggregator
  - Selective
- **Vendor** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with filter option by role.
- **Auto-renewal type** – Yes/No/Ignore.

Report on Locally Created e-Products

This report retrieves e-products that have been created locally.

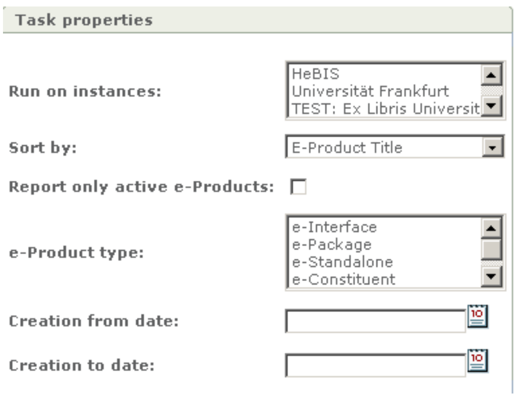


Figure 127: Report on Locally Created e-Products

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by**. Options are:
  - e-Product title
  - Creation date
- **Report only active e-products –** An e-product is active if it has an e-product status that is not **Withdrawn** and if the current date is greater than the activation from date and smaller than the expiration date.
- **e-Product type**:
  - e-Interface
  - e-Package
  - e-Standalone
  - e-Constituent
  - e-Print
- **Creation to and from dates**

Report on e-Product with Usage Statistics

This report provides information on e-products that contain usage statistics.

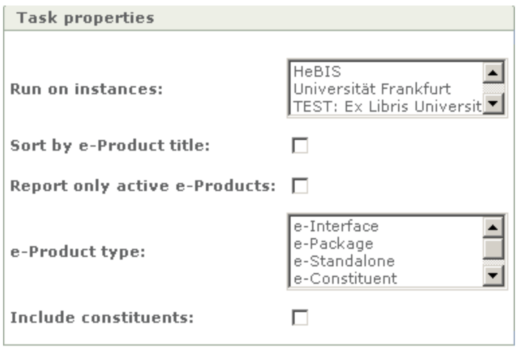


Figure 128: Report on e-Product with Usage Statistics

These are e-products in which **Yes** is selected in the admin record's **Usage statistics available** field.

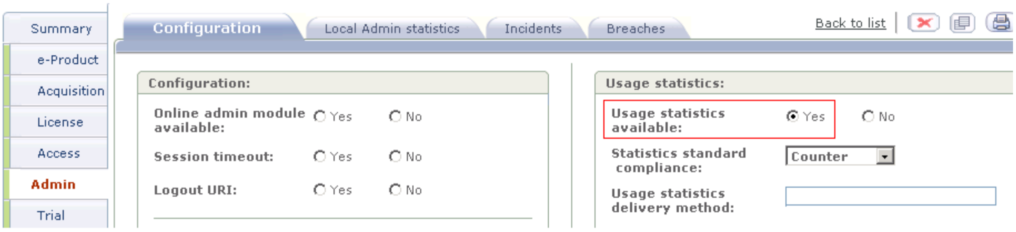


Figure 129: Usage Statistics Available

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by e-product title**
- **Report only active e-products –**An e-product is active if it has an e-product status other than Withdrawn and when the current date is greater than the activation from date and less than the expiration date.
- **e-product type**
- **Include constituents**

Report of Active e-Products Without Licenses

This report retrieves active e-products without active licenses.

An e-product is considered active if it has an e-product status other than **Withdrawn** and if the current date is greater than the activation from date and less than the expiration date.

A license is considered active if:

- the license's status is **Approved**, the license start date is less than the current date, and the license end date is greater than the current date
- the license's status is **Approved**, the license renewal type is **Perpetual**, the license start date is less than the current date, and the license end date is undefined

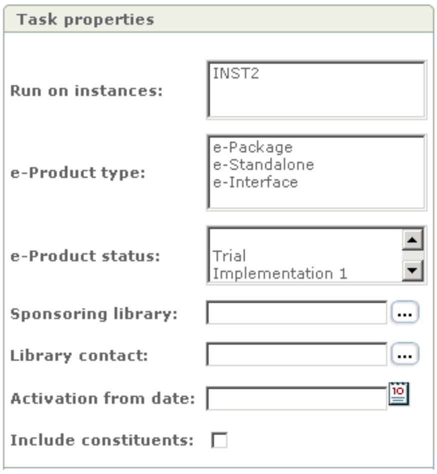


Figure 130: Report of Active e-Products Without Licenses

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **e-Product type:**
  - e-Package
  - e-Standalone
  - e-Interface
- **e-Product status**. Possible values are:
  - Trial
  - Implementation 1
  - Implementation 2
  - Implementation 3
  - Production
  - Withdrawn
- **Sponsoring library**. The library that sponsored the e-product. Note that clicking on the ellipsis on the right hand side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.
- **Library contact.** Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with filter option by role.
- **Activation from date**. Date from which the e-product is active.

- **Include constituents**. If the user selects this option, the output file includes packages that match the selected filters and all the constituents that belong to this package even if the constituents do not match the filters and other conditions. If the **Include Constituents** check box is not selected, only the constituents that match filters are included in the output together with their parent package.

Report of IP Ranges by Licensor

This is a report of IPs that are valid per active license. A license is active if it has the status **Approved** and if the current date is between or equal to the license start and end dates. IP ranges are defined per library or per license. Licensed libraries are listed in the **Allowed Location** tab of the license.

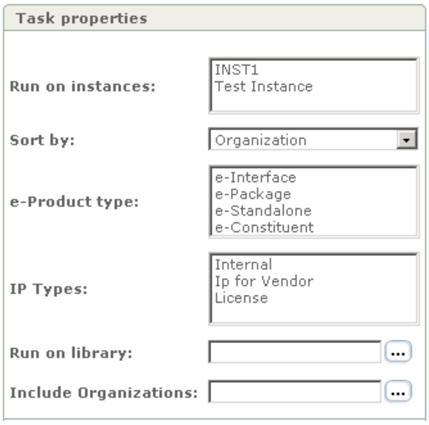


Figure 131: Report of IP Ranges by Licensor

You can define the following parameters for this report:

- **Instance** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by**. Options are:
  - Organization
  - Library
  - e-Product title
- **e-Product type:**
  - e-Interface
  - e-Package
  - e-Standalone
  - e-Constituent

- **IP types:**
  - Internal – taken from the Library record
  - IP for Vendor – taken from the Library record
  - License – IP range entered directly on the license allowed location tab.
- **Run on libraries** - **C**licking on the ellipsis on the right hand side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.
- **Include Organizations** - Clicking the ellipsis on the right side of the field activates a pop-up window of organizations (licensors) with filter option by role.

21

View Report Output

This section includes:

- About Viewing Report Output on page 270
- General Report of e-Products on page 272
- Report e-Products by Selection Status on page 283
- Report on e-Packages with Acquisitions on page 283
- Report on Locally Created e-Products on page 284
- Report on e-Products with Usage Statistics on page 286
- Report of Active e-Products Without Licenses on page 286
- Report of IP Ranges by Licensor on page 292

About Viewing Report Output

View Report Output shows all the occurrences of each report. These can be reports run in the past or reports currently running. The list of report outputs is identical to the list of reports defined in **Reports** on page **249**.

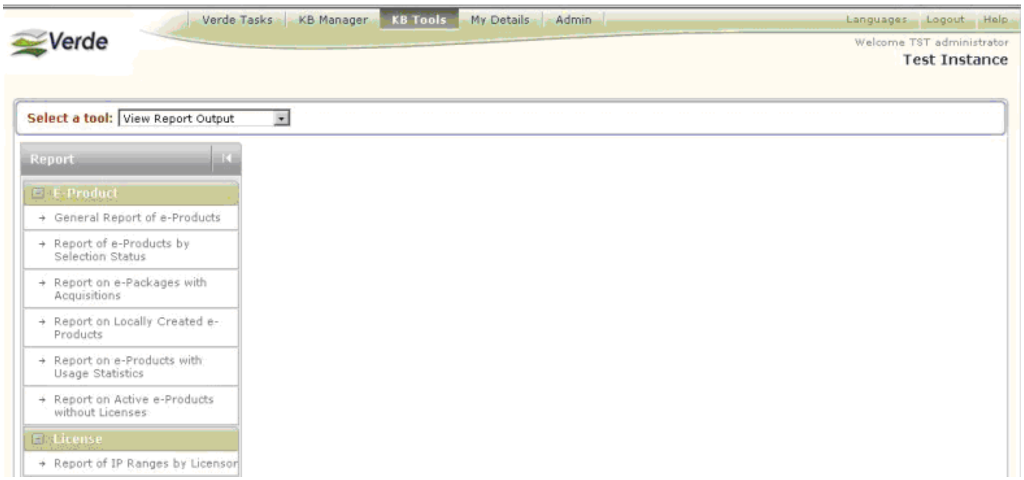


Figure 132: Select a Tool – View Report Output

Clicking any of the reports opens a screen displaying the following columns of information:

- **Report date**
- **Report name**
- **Report summary**
- **Report file**
- **Report status**

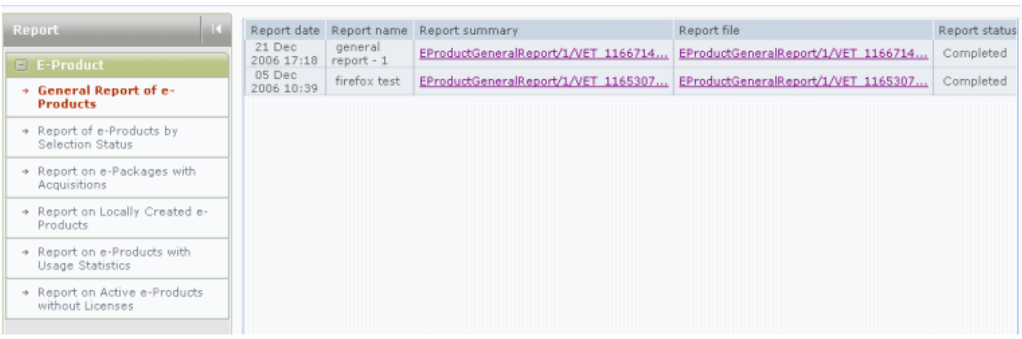


Figure 133: Report Output

- **Report date** – The date and time that the report was run.
- **Report name** – The report name that can be defined in the Delivery Properties window.

- **Report summary –** A log is created for all reports that have either run successfully, or have failed completion. Clicking the summary hyperlink activates a dialog for opening or saving the status report.

```
VET_1135514959870_1[1].1135514960758_summary - Notepad
File  Edit  Format  Help
PARAMETERS IN USE
-------------------------------------------------------
status: REMOVED
statusUpdateDate: null
vendor: null
sponsoringLibrary: null
selector: null
category: null
includeConstituents: true

Running mode: online


SUMMARY
-------------------------------------------------------
Start date:   Sun Dec 25 14:49:20 IST 2005
End date:     Mon Dec 26 00:24:17 IST 2005
Elapsed time: 0 days, 9 hours, 34 min, 57 sec
--------------------------------------------
Instance: INST1
--------------------------------------------
Input records: 385326
Non-matching records: 382684
 Selection status does not match: 382682
 Selection status update date does not match: 2
 Vendor does not match: 0
 Sponsoring library does not match: 0
 Selector does not match: 0
 Category does not match: 0
Matching records: 2642
--------------------------------------------
Displayable records: 2647 (2642 matching EProducts + 5 non-matching parents for display)
Non-displayable matching records (non-includable constituents): 0
```

Figure 134: Report Summary

- **Report file** – When the report has run successfully, the output can be viewed by clicking the output hyperlink. This activates a dialog box for opening or saving the output. The output is in the format chosen when running the report—for example, CSV, or XML.

	A	B	C	D	E	F	G	H	I	J	K	L
1	EProduct t	Interface ti	Package title	Constituent title	Standalone t	Identifier	Selection s	Selection s	EProduct s	Acquisition code		
2	Interface	East View				null	null	null	Production	null		
3	Package		East View China Electronics/Information Science			null	Rejected	12/8/2005	Production	null		
4	Constituent			Archives Spacetime		1008-6544	Removed	12/8/2005	Production	null		
5	Interface	Factiva				null	null	null	Production	null		
6	Package		Factiva			null	Removed	11/6/2005	Production	ACQ_1134558598247_8		
7	Constituent			Teen		0040-2001	Removed	11/6/2005	Production	ACQ_1134558598247_8		
8	Constituent			21st century fuels		1075-038X	Removed	11/6/2005	Production	ACQ_1134558598247_8		
9	Constituent			AACE International transactions		1528-7106	Removed	11/6/2005	Production	ACQ_1134558598247_8		
10	Constituent			ABA bank marketing		1539-7890	Removed	11/6/2005	Production	ACQ_1134558598247_8		
11	Constituent			AC magazine		1361-3685	Removed	11/6/2005	Production	ACQ_1134558598247_8		
12	Constituent			Accent on living		0001-4508	Removed	11/6/2005	Production	ACQ_1134558598247_8		
13	Constituent			Access control & security systems integratio		1084-6425	Removed	11/6/2005	Production	ACQ_1134558598247_8		
14	Constituent			Accountancy age		0001-4672	Removed	11/6/2005	Production	ACQ_1134558598247_8		
15	Constituent			Accountancy Ireland		0001-4699	Removed	11/6/2005	Production	ACQ_1134558598247_8		
16	Constituent			The Accountant		0001-4710	Removed	11/6/2005	Production	ACQ_1134558598247_8		
17	Constituent			Accounting & finance		0810-5391	Removed	11/6/2005	Production	ACQ_1134558598247_8		

Figure 135: Report File

NOTE:

Unfortunately, due to known limitations in Excel, the SFX ID field in reports is corrupted when the files are opened directly in Excel from the Verde UI. Any number larger than 15 digits must be formatted as text in order to display properly in Excel. For detailed instructions, refer to the **How to Best Format Reports** section of the *KnowledgeBase Update Process and Instructions* document.

- **Report Status** – The last column describes the report run status. Possible options are:
  - In progress
  - Completed
  - Failed

General Report of e-Products

The default output parameters of the **General Report of e-Products** are listed in the tables below.

The output for this report is built according to the following rules:

- e-Product field values for retrieved e-products are always represented, regardless of the selected filter parameters.
- A separate line is created for each coverage, for e-products with multiple coverages.
- If at least one field of an e-product attribute record is selected, all values related to this attribute record are displayed in the report. A separate line is created for each attribute record.
- If local acquisition or invoice filters are selected, the values of the related acquisition record(s) are displayed in the report as well.

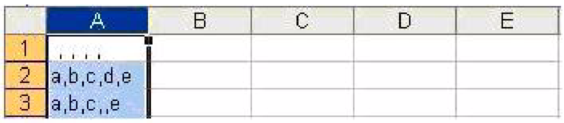
  For example, if an e-product has one global coverage and two local coverages and an acquisition record with the status defined, four lines for the e-product are displayed in the general report output:
  - the global coverage
  - the local coverage
  - the second local coverage
  - the acquisition record

The active libraries appear in one column, delimited by commas. It is possible to expand/collapse the list using the Excel tools. For detailed instructions, see the following procedure.

To split one cell with delimited content into multiple cells in Excel:

1 Sort the report output by instance code if the report was executed for a number of instances.

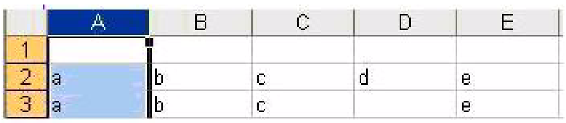
2 Highlight all the cells, or highlight the column:



3 Select **Data > Text To Columns**.

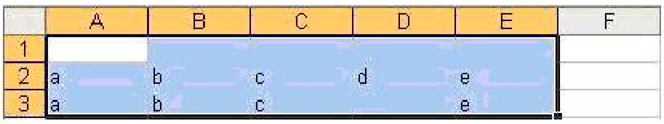
4 In the dialog box that opens, select the **Delimited** radio button. Click the **Next** button.

5 Under **Delimiters**, select **Comma** and click **Finish**. The content is split into multiple cells..

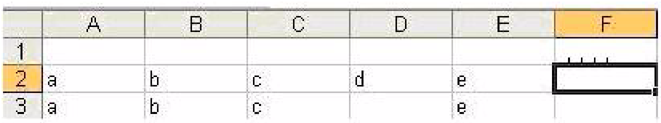


To combine the contents of multiple cells into a single, delimited cell in Excel:

1 Go to the first cell in which you want the merged or concatenated contents of cells to appear (F1 in this example).



2 Type the formula `=A1&","&B1&","&C1&","&D1&","&E1` in the formula bar and press the ENTER key. A joined string appears in the destination cell.



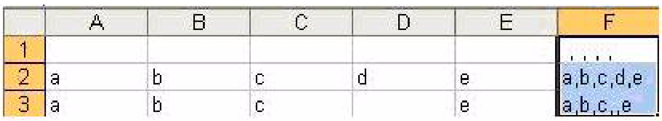
If you need to combine data in multiple cells, you can use the fill handle to copy the formula to adjacent cells. The fill handle is the small black square located in the lower right corner of any highlighted cell.

To user the fill handle:

1 Highlight the destination cell (in this example, F1).

2 Point to the fill handle. The pointer arrow changes to a black cross.

3 Click, hold, and drag the fill handle down the row of cells. Excel's relative referencing feature ensurse that the cell names are properly replaced in the copied formulas. When you release the fill handle, the destination cells contain the joined character string.



CAUTION:

Destination cells contain formulas only.

You may want to delete the cells containing the original information you have joined in the destination cells. In this example, that would be cells A to E. However, you must remember that the destination cells only contain formulas, which pull information from the original cells. If you delete the cells from which the formula is pulling its information, the cell displays an error message, **#REF!**,.

To avoid this error, paste the formula's results as actual values into your destination cells.

To paste the formula's results as actual values:

1 Highlight all the cells with the concatenate formulas.

2 Select **Edit > Copy**.

3 Select **Edit > Paste Special**.

4 When the Paste Special dialog box opens, select the **Values** radio button in the top section.

5 Click **OK**.

NOTE:

The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 26. e-Product Fields

	Field Name
1	e-Product type
2	e-Product title
3	e-Product identifier
4	e-Product code

Table 26. e-Product Fields

	Field Name
5	Work expression code
6	(e-Product) Instance code
7	Source instance code
8	SFX id
9	MetaLib id
10	Other id
11	Other source
12	Update target
13	Selection status
14	Selection status update date
15	e-Product status
16	e-Product status update date
17	Availability from
18	Availability to
19	Private note
20	(e-Product) Created by
21	(e-Product) Creation date
22	(e-Product) Update by
23	Update center
24	Update local
25	Activation from
26	Activation to
27	Concurrent number of users
28	Selector
29	Sponsoring library
30	Availability
31	Activity status date note
32	Public note
33	Suppress

Table 26. e-Product Fields

	Field Name
34	Up code
35	Free or subscription
36	Cross ref enabled
37	Local coverage
38	Coverage text
39	Holdings in ILS
40	Holdings note
41	Package type
42	Selective mode code
43	SFX id 2
44	JKEY
45	Title key
46	Global embargo number of months
47	Global embargo operator
48	Added to package
49	Removed from package
50	Coverage type
51	(Coverage) from year
52	(Coverage) from issue
53	(Coverage) from volume
54	(Coverage) to year
55	(Coverage) to issue
56	(Coverage) to volume

Table 27. Acqusition Fields

	Field Name
57	Acquisition code
58	Acquisition number

Table 27. Acqusition Fields

	Field Name
59	Subscription period code
60	Vendor
61	Vendor subscription code
62	Purchase order no.
63	Acquisition status
64	Acquisition status date
65	Order date
66	Subscription type
67	Subscription type note
68	Print purchase order no.
69	Number of copies
70	Note for ILS
71	Note for vendor
72	Advance notice date
73	Renew cancellation date
74	Renew cancellation decision note
75	Renew cancellation note ILS
76	Renew cancellation note vendor
77	Print cancellation restriction
78	Print cancel note
79	Acquisition method
80	Material type
81	Price
82	Discount on price
83	Pricing Model
84	Price cap
85	Price Cap From
86	Price Cap To
87	Consortial agreement

Table 27. Acqusition Fields

	Field Name
88	Pooled concurrent users
89	Auto renewal
90	Subscription notification
91	Vendor advanced notice
92	Institute Code
93	Campus Code
94	Concurrent Users Note
95	Budget
96	(Acquisition) Created By
97	(Acquisition) Updated By
98	Creation Date
99	Update Date
100	Subscription p. start date
101	Subscription p. end date

Table 28. License Fields

	Field Name
102	License code
103	License name
104	License type
105	License method
106	License start date
107	License end date
108	License execution date
109	License duration
110	License status
111	License status note
112	Licensor

Table 28. License Fields

	Field Name
113	Original licensor
114	Licensee
115	Licensing agent
116	Local license negotiator
117	Delivery requirements
118	License URI
119	License URI type
120	Physical location
121	File location
122	Vendor advanced notice
123	Vendor advanced notice value
124	Licensing note
125	Public note
126	Replaced by
127	Replaces
128	Linked license note
129	Renewal date
130	Created by
131	Updated by
132	Created date
133	Update date
134	General terms note
135	User restrictions note
136	Use restrictions note
137	Authorizes user definition
138	Local authorizes user definition
139	Fair use clause
140	All rights reserved code
141	DB protection override code

Table 28. License Fields

	Field Name
142	Citation requirement details
143	Digital copy code
144	Digital copy term note
145	Print copy
146	Print copy term note
147	Scholarly sharing
148	Scholarly sharing note
149	Distance education or fax code
150	Distance education term note
151	Intr lib print
152	Intr lib secure trans code
153	Intr lib electronic code
154	Intr lib keeping required code
155	Intr lib term note
156	Course reserve print code
157	Course reserve Electronic or cash code
158	Course reserve term note
159	Electronic link code
160	Electronic link term note
161	Course pack print code
162	Course pack electronic code
163	Course pack term note
164	Remote access code
165	Work in term use note (corresponds to the 'Walk-in term use note' field)
166	Perpetual Access rights
167	Perpetual access from
168	Perpetual access to
169	Perpetual holdings note

Table 28. License Fields

	Field Name
170	Archiving rights code
171	Archiving format code
172	Archiving note
173	Accessibility compliance
174	Completeness of content Code
175	Concurrency with print code
176	Intellectual prop warranty
177	Confidentiality of user
178	UCITA override
179	Click-wrap modification
180	Indemnification code
181	Indemnification
182	Confidentiality of agreement
183	Confidentiality of agreement note
184	Governing law
185	Governing jurisdiction
186	Applicable Copyright law
187	Cure period for breach
188	Cure period for breach UOM code
189	Content warranty
190	Performance warranty indicator
191	Performance warranty
192	Maintenance window
193	Renewal type
194	Non renewal notice period
195	Non renewal notice code
196	Licensee termination rights
197	Licensee trmn condition code
198	Licensee notice period of trmn

Table 28. License Fields

	Field Name
199	Licensee notice period of Trmn code
200	Licensor termination rights

Table 29. Local Acquisition Fields

	Field Name
201	Institute code (local ACQ)
202	Local ACQ budgets
203	Cost share
204	Cost share percentage
205	Cost share date

Table 30. Invoice Fields

	Field Name
206	Invoice code
207	Invoice number
208	Payment status
209	Invoice date
210	Payment date
211	Net amount
212	Total amount
213	Invoice Currency
214	Invoice Note

Table 31. Access Fields

	Field Name
215	Access code
216	Access type
217	Access status

Table 31. Access Fields

	Field Name
218	Access implementation status
219	Access check performed
220	Check performed on

Report e-Products by Selection Status

The default output parameters of the **Report e-Products by Selection Status** are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 32. Report e-Products by Selection Status

	Internal Name	Display Name
1	eproductType	e-Product type
2	(eproduct)instanceCode	instance Code
3	einterfaceTitle	e-Interface title
4	epackageTitle	e-Package title
5	econstituentTitle	e-Constituent title
6	estandaloneTitle	e-Standalone title
7	eproductIdentifier	Identifier
8	procurementStatus	Selection status
9	procurementStatusUpdateDate	Selection status update date
10	eproductStatus	e-Product status
11	acquisitionCode	Acquisition code

Report on e-Packages with Acquisitions

The default output parameters of the **Report on e-Packages with Acquisitions** are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 33. Report on e-Packages with Acquisitions

	Internal Name	Display Name
1	acquisitionNumber	Acquisition number
2	acquisitionCode	Acquisition code
3	purchaseOrderNo	Purchase order no.
4	vendorCode	Vendor
5	vendorSubscriptionCode	Vendor subscription code
6	Price	Price
7	orderDate	Order Date
8	subscriptionStartDate	Subscription p. start date
9	subscriptionEndDate	Subscription p. end date
10	eproductTitle	e-Product title
11	eproductIdentifier	e-Product identifier
12	instanceCode	Instance code

Report on Locally Created e-Products

The default output parameters of the **Report on Locally Created e-Products** are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 34. Report on Locally Created e-Products

	Internal Name	Display Name
1	eproductType	Product type
2	eproductTitle	e-Product title
3	eproductIdentifier	Identifier

Table 34. Report on Locally Created e-Products

	Internal Name	Display Name
4	eproductCode	e-product code
5	activationFromDate	Activation from date
6	activationToDate	Activation to date
7	creationDate	Creation date
8	workExpressionCode	Work expression code
9	(eproduct)instanceCode	Instance code

Report on e-Products with Usage Statistics

The default output parameters of the **Report on e-Products with Usage Statistics** are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 35. Report on e-Products with Usage Statistics

	Internal Name	Display Name
1	eproductType	e-Product type
2	eproductTitle	e-Product title
3	eproductIdentifier	Identifier
4	eproductCode	e-product code
5	activationFromDate	Activation from date
6	activationToDate	Activation to date
7	creationDate	Creation date
8	workExpressionCode	Work expression code
9	(eproduct)instanceCode	Instance code=Instance code

Report of Active e-Products Without Licenses

The default output parameters of the **Report of Active e-Products Without Licenses** are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 36. Report of Active e-Products Without Licenses

	Field name
1	e-Product type
2	e-Product title
3	(e-Product) identifier

Table 36. Report of Active e-Products Without Licenses

	Field name
4	e-Product code
5	Work expression code
6	Instance code
7	Source instance code
8	SFX id
9	MetaLib id
10	Other id
11	Other source
12	Update target
13	Selection status
14	Selection status update date
15	e-Product status
16	e-Product status update date
17	Availability from
18	Availability to
19	Private note
20	Created by
21	Creation date
22	Update by
23	Update center
24	Update local
25	Activation from
26	Activation to
27	Concurrent number of users
28	Selector
29	Sponsoring library
30	Availability
31	Activity status date note
32	Public note

Table 36. Report of Active e-Products Without Licenses

	Field name
33	Suppress
34	Up code
35	Free or subscription
36	Cross ref enabled
37	Local coverage
38	Coverage text
39	Holdings in ILS
40	Holdings note
41	Package type
42	Selective mode code
43	SFX id 2
44	JKEY
45	Title key
46	Added to package
47	Removed from package
License Fields	
48	License code
49	License name
50	License type
51	License method
52	(License) start date
53	(License) end date
54	License execution date
55	License duration
56	(License) status
57	(License) status note
58	Licensor
59	Original licensor
60	Licensee

Table 36. Report of Active e-Products Without Licenses

	Field name
61	Licensing agent
62	Local license negotiator
63	Delivery requirements
64	License URI
65	License URI type
66	Physical location
67	File location
68	Vendor advanced notice
69	Vendor advanced notice value
70	Notice period code
71	Licensing note
72	Public note
73	Replaced by
74	Replaces
75	Linked license note
76	Renewal date
77	Created by
78	Updated by
79	Created date
80	Update date
81	General terms note
82	User restrictions note
83	Use restrictions note
84	Authorizes user definition
85	Local authorizes user definition
86	Fair use clause
87	All rights reserved code
88	DB protection override code
89	Citation requirement details

Table 36. Report of Active e-Products Without Licenses

	Field name
90	Digital copy code
91	Digital copy term note
92	Print copy
93	Print copy term note
94	Scholarly sharing
95	Scholarly sharing note
96	Distance education
97	Distance education term note
98	Intr lib print or fax code
99	Intr lib secure trans code
100	Intr lib electronic code
101	Intr lib keeping required code
102	Intr lib term note
103	Course reserve print code
104	Course reserve Electronic or cash code
105	Course reserve term note
106	Electronic link code
107	Electronic link term note
108	Course pack print code
109	Course pack electronic code
110	Course pack term note
111	Remote access code
112	Work in term use note
113	Perpetual Access rights
114	Perpetual access from
115	Perpetual access to
116	Perpetual holdings note
117	Archiving rights code
118	Archiving format code

Table 36. Report of Active e-Products Without Licenses

	Field name
119	Archiving note
120	Accessibility compliance
121	Completeness of content Code
122	Concurrency with print code
123	Intellectual prop warranty
124	Confidentiality of user
125	UCITA override
126	Click-wrap modification
127	Indemnification code
128	Indemnification
129	Confidentiality of agreement
130	Confidentiality of agreement note
131	Governing law
132	Governing jurisdiction
133	Applicable Copyright law
134	Cure period for breach
135	Cure period for breach UOM code
136	Content warranty
137	Performance warranty indicator
138	Performance warranty
139	Maintenance window
140	Renewal type
141	Non renewal notice period
142	Non renewal notice code
143	Licensee termination rights
144	Licensee trmn condition code
145	Licensee notice period of trmn
146	Licensee notice period of Trmn code
147	Licensor termination rights

Report of IP Ranges by Licensor

The default output parameters of the **Report of IP Ranges by Licensor** are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 37. Report of IP Ranges by Licensor

	Internal Name	Display Name
1	InstanceCode	Instance
2	OrganizationCode	Institute
3	OrganizationName	Institute Name
4	Address	License Code
5	LicenseCode	License Code
6	LicenseName	License Name
7	Licensor	Licensor
8	LicAddress	Licensor Address
9	LicensorName	Licensor Name
10	IPRangeBegining	IP Range Beginning
11	IPRangeEnding	IP Range Ending
12	Excluding	Excluding
13	IPRangeType	IP Address Type
14	EproductTitle	e-Product Title

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Customized Report Outputs

This section includes:

- About Customizing Report Outputs on page 293
- Creating Your Own Properties File on page 294
- Editing the Properties File on page 294
- Choosing a Properties File on page 297

About Customizing Report Outputs

All Verde report outputs can be customized by the instance. In the Delivery Properties screen, you have the option of choosing a defined report output.

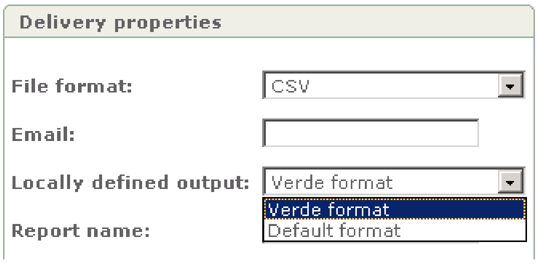

Figure 136: Customized Report Outputs

By default, the **Locally defined output** drop-down list contains two options: **Verde format** and **Default format**. The Verde format is a fixed format and cannot be customized by users. The default format is editable for, and accessible to, users.

When creating a customized output, you can configure the following:

- the fields included in the report output and the order in which these fields appear
- the column names
- the header for the report

Creating Your Own Properties File

Customization is accomplished through a properties file. All properties files are on the server in the following directory:

`/exlibris/verde/$VERDE_BASE/home/profile/reportsCustomization`

There is a subdirectory for each instance. For example:

`/exlibris/verde/home/data/reportsCustomization/INST1`

For each report, task, and loader, there is a default file that matches the report name. For example:

- `EProductGeneralReportOutputFormat.properties` for the e-product general report.
- `EProductsUpdateLoaderOutputFormat.properties` for the e-product update loader report.
- `LicenseRenewalTaskOutputFormat.properties` for the license renewal report.

To create your own customized properties file, copy the default file and add `_name` to it. For example:

- `EProductGeneralReportOutputFormat_mylibrary.properties`
- `LicenseRenewalTaskOutputFormat_myinstance.properties`

Editing the Properties File

The properties file contains three sections: a section that controls the fields included in the output, a section that controls the column names, and a section that controls the header parameters.

Fields

The first section of the file contains a list of all the fields that are included in the output and a number that controls the sequence in which the fields occur.

For example, in the `EProductGeneralReportOutputFormat.properties` file, the output fields are:

```
1=eproductType
2=eproductTitle
3=eproductIdentifier
4=eproductCode
5=workExpressionCode
6=(eproduct)instanceCode
7=sourceInstanceCode
8=SFXID
9=metaLibID
10=otherID
11=otherSource
...
```

In the `LicenseRenewalTaskOutputFormat.properties` file, the license renewal output fields are:

```
1=licenseCode
2=licenseName
3=licensee
4=licensor
5=renewalTypeCode
6=localLicenseNegotiator
7=endDate
8=eproductTitle
9=eproductIdentifier
```

To remove a field, comment it out by inserting a hash (#) sign at the beginning of the line. For example:

- `#3=eproductIdentifier`
- `#7=endDate`

To change the order of the fields, change the sequence number. For example:

- `1=eproductIdentifier` means that this field would appear first
- `4=eproductIdentifier` means that this field would appear fourth

NOTE:
The default file contains a list of all possible fields. You can remove and change the order of fields, but you cannot add fields.

Column Names

In this section called **Keys Headers** in the properties file, the names of columns are assigned.

Note the following:

- The number of columns should match the number of fields.
- The first word is the field name as it appears in section 1. The second phrase is the column name that appears in the report. For example:
  - `eproductType=e-product type`
  - `localLicenseNegotiator=Local license negotiator`

If a field does not appear, the system uses the Verde default field name.

Header Parameters

In this section, you configure the contents and order of the report header.

Note that spaces and a return (line break) can be added between fields.

The report header appears as the first line in the CSV and PRN files and as the first section in the XML output.

If this section does not exist, the default header file (`defaultHeaderFormat.properties`) is used. If this default header file does not exist, there is no header in the report.

When defining the header options, note that the number linked to each element defines its order in the header. In the example below, the report name appears before the library name:

```
1_header_reportName=running report name
2_header_spaces=4
3_header_libraryName=yes
```

The following can be included in the header:

- **Report name** – the name you assign to the report, for example:

  `1_header_reportName= My Library's report`

  Note that the number (in this example, 1) is the order in which the parameter appears in the report.

  The **value Running report name** uses the system name for the report. This name cannot be changed, but it can be replaced by any other value that appears in the report instead of the report name—for example, `1_header_reportName=My Library's report`.

- **Library name** – The name of the instance in which the report was run—for example:

  `n_header_libraryName=yes`

  Values can be **yes** or **no**.

- **Staff user name** – For example:

  `n_header_staffName='yes'`

  This includes the name of the staff user that ran the report.

- **Date** – for example:

  `n_header_dateFormat=`(string)format of execution date

  dd/mm/yyyy 'at' HH:mm:ss translates to:

  `20/07/2005 at 12:08:56`

  EEE, d MMM yyyy HH:mm:ss translates to:

  `Wed, 20 Jul 2005 12:08:56`

- **n_header_spaces=(number)** – This defines the number of spaces between elements of the header.

- **n_header_return=(number)** – This defines the number of returns—that is, line breaks.

  The following is an example of the header section for the **Subscriptions for Review Report**:

```
1_header_reportName=running report name
2_header_spaces=4
3_header_libraryName=yes
4_header_spaces=4
5_header_dateFormat=dd/mm/yyyy 'at' HH:mm:ss
```

  This produces the following header:

```
Subscriptions for Review Report  Ex Libris University  20/12/
2005 at 12:40:22
```

Choosing a Properties File

In the drop-down list, the system automatically provides a list of all the properties files that exist for the report/task being run.

After modifying the properties files, use the JMX console to refresh the drop-down list. Alternatively, you can restart Verde to refresh this list.

When a new instance is created using the **Duplicate** function, the properties directory is created.

If, for some reason, the instance is created a different way, use the **ReportsCustomizationMngr** JMX console service to copy the directory for a new instance. Enter the new instance name in the window provided.

To refresh the drop-down list using the JMX console:

1 Reduce the URL address of your Verde environment in your Web browser so that the address includes only the following: **http://<server name>:<port number>/**. Go to this URL. The JBoss page opens.

2 Under **JBoss Management**, click **JMX Console**. In the login prompt, enter your instance administrator user name and password.

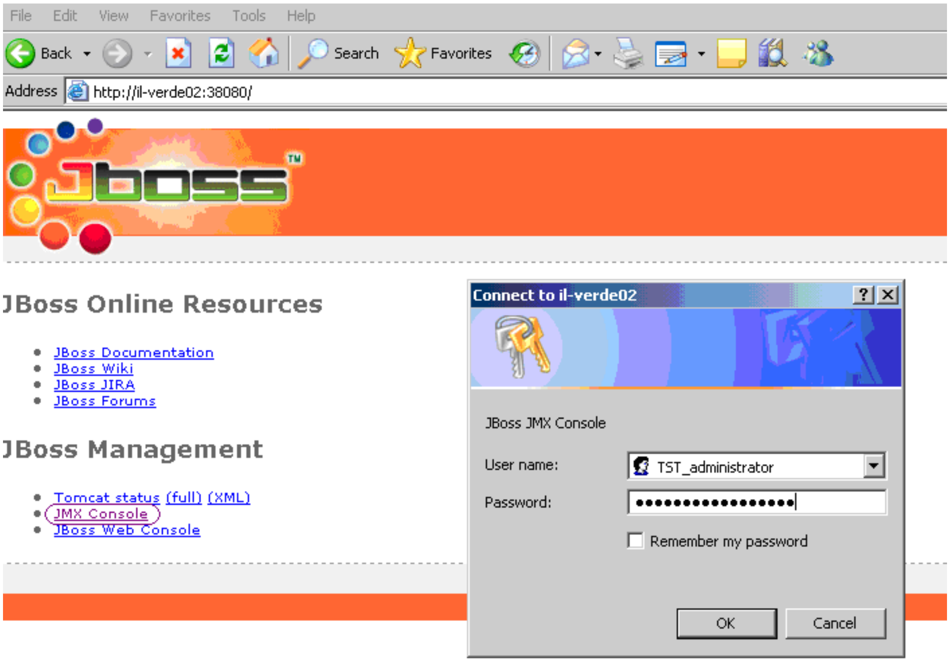

Figure 137: JBoss JMX Console Login

The JMX Agent View page opens.

3 Locate the **Verde** section at the end of the page and click the **Report Customization Manager Service** link in this section.

Figure 138: JMX Agent View – Verde Section

The JMX MBean View page opens.

4 Locate the **refreshCache** section and click **Invoke**. The JMX MBean Operation Result page opens with the result of the operation..

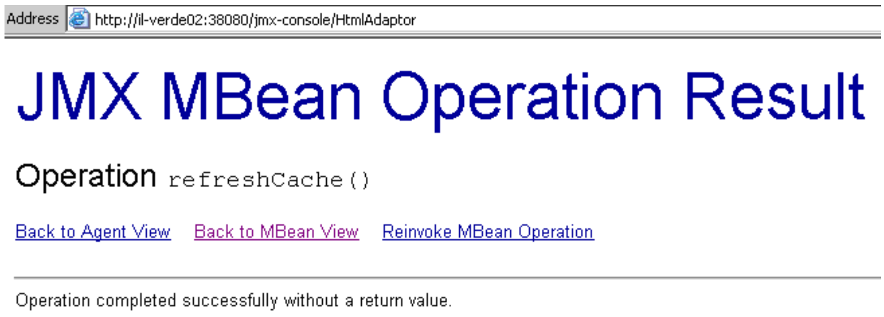

Figure 139: JMX MBean View – Refresh Cache

5 Log in once again to your Verde environment. The name of your own properties file is now displayed in the drop-down list.

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Tasks

This section includes:

- About Verde Tasks on page 301
- e-Product on page 302
- Acquisitions on page 302
- Trial on page 304
- License on page 306

About Verde Tasks

The following Verde tasks are available:

- e-Product
  - SFX Sync
- Acquisitions
  - Subscription renewal
  - Subscriptions for review
- Trial
  - Trial participant alerts
  - Trial management process
- License
  - License renewal

e-Product

SFX Sync

For information about the SFX sync task, see **Synchronizing e-Product Updates with SFX** on page **613**.

Acquisitions

Subscription Renewal

This task retrieves all active acquisition records that are eligible for renewal (the renewal type is Automatic) and renews them.

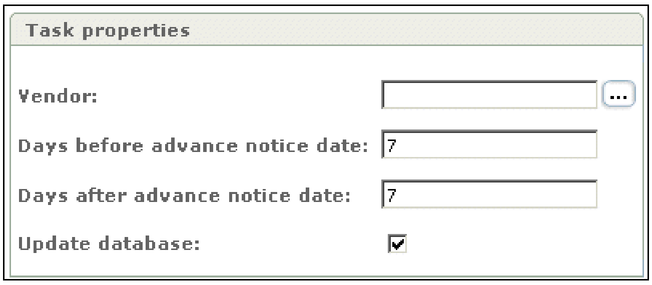

Figure 140: Acquisition – Subscription Renewal

An acquisition record is active if it has a status of **Active** or **Renewed**, an acquisition start date that is less than the current date, and an acquisition end date that is greater than the current date.

This task does the following:

- Triggers the renewal of licenses (**Automatic** renewal type) associated with the renewed acquisition records.
- Creates a new acquisition record. Fields that are inherited from the renewed record are:
    - Subscription open date
    - Vendor
    - Budgets
    - Advance notification period
    - Auto renewal
    - Print cancellation restrictions and note
    - Acquisition number

- Purchase order number
- Vendor subscription ID
- Subscription type
- Subscription type note
- Note for ILS
- Note for vendor
- Price
- Method of acquisition
- Material type
- Discount
- Pricing model
- Price cap
- Price cap period from and to
- Consortial agreement
- Pooled concurrent users
- Concurrent users note
- Create a new subscription record.
- Create new local acquisition records based on existing local acquisitions
- Link the same e-products to the new acquisition record

Input parameters for this task are the following:

- Vendor – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with an option of filtering by role.
- Number of days before/after advance notice date. These numbers actually relate to the date on which the task is run (run date) and determine the range of advance notice dates of the acquisitions that will be retrieved by the task. If these numbers are X and Y, the task will retrieve only those acquisitions whose advance notice dates fall within the range between X days before the run date and Y days after the run date. If these fields are left empty, 7 days are set by default in both fields.
- Update database – If this box is not selected, the report can be run, and the output reviewed before running it again in update database mode.

Subscriptions for Review

This process retrieves all active acquisition records that are eligible for renewal but are not renewed automatically (renewal type is not **Automatic**) and initiates a review process on them.

The task parameters are the same as for **Subscription Renewal**. For details of these parameters, see **Subscription Renewal** on page **302**.

This task triggers the **Renew Acquisitions** and **Review e-Product** workflows. For details, see **Review e-Product and Renew Acquisitions Workflows** on page **219**.

Trial

Trial Participant Alerts

Alerts are sent at the following intervals:

1. When the trial starts.
2. On the trial action date.
3. When the trial decision is due.
4. When the trial is over.
5. When the trial decision is made.

NOTE:
The decision may be registered before the trial is over. The task requires no input parameters.

Trial Management Process

The trial management task is designed to perform changes according to the trial start and end dates.

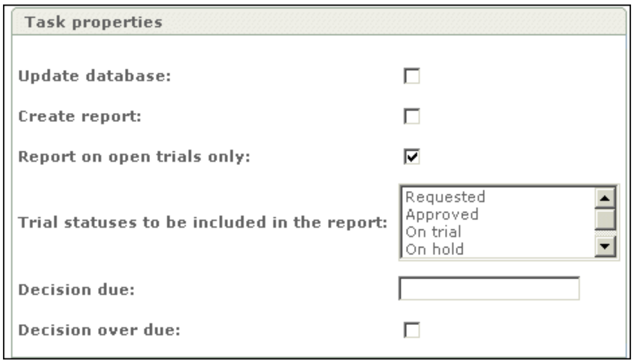

Figure 141: Trial Management Process Properties

This task performs the following changes:

- When the start date is reached, changes the status **Approved** to the status **On hold** or **On trial**.
- When the end date is reached, changes the status **On trial** to the status **Trial Over**

All other changes should to be conducted manually.

Input parameters are:

- **Update database** – If this check box is not selected, the report can be run, and the output reviewed before running it again in update database mode.
- **Create a report** – If the box is not selected, the report will be run, but the output file will be empty.
- **Report on open trials only**
- **Trial statuses to be included in the report**. One or many status options may be highlighted:
  - Requested
  - Approved
  - On trial
  - On hold
  - Trial over
- **Decision due**
- **Decision overdue**

License

License Renewal

This report allows for the selection of licenses that are eligible for renewal, and depending on the way in which renewal is set in the license, the report either renews the licenses automatically or reports on them.

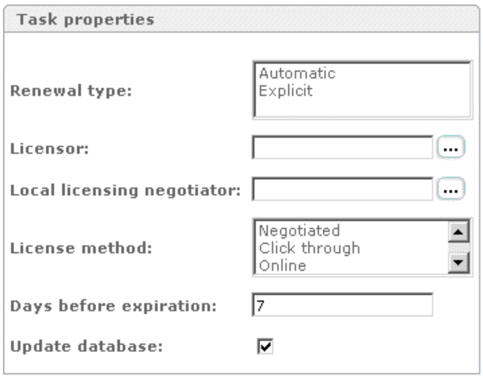

Figure 142: License Renewal Properties

The input parameter options are as follows:

- **Renewal type**. Possible values are:
  - Automatic
  - Explicit
- **Licensor** – Clicking the ellipsis on the right side of the field activates a pop-up window of organizations (licensors).
- **Local licensing negotiator** - Clicking the ellipsis on the right side of the field activates a pop-up window of contacts.
- **License method**. Possible values are:
  - Negotiated
  - Click through
  - Online
  - Manifest assent
  - Shrinkwrap
- **Days before expiration** – The task retrieves all licenses that will expire within this defined number of days. In addition, all expired licenses are retrieved. For example, if the run date is August 10th and the **Days before expiration = 7**, Verde retrieves all licenses that are eligible for renewal and

whose end date is either in the past or within the next 7 days (that is, they expire by August 17th).

- **Update database** – If this box is not selected, the report can be run and the output reviewed before running it again in update database mode.

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View Task Output

This section includes:

- **e-Product** on page **309**
- **Acquisition** on page **310**
- **Trial** on page **311**
- **License** on page **312**

The View Task Output options and functionality are similar to those of the View Report Output, as described in **View Report Output** on page **269**.

e-Product

SFX Sync

The output file for the **SFX Synch** task cannot be customized. The default output parameters are listed in the table below.

Table 38. SFX Sync

	Internal Name	Display Name
1	eProduct Code	e-Product Code
2	eProduct Type	e-Product Type
3	Processing Date and Time	Processing Date and Time

Acquisition

Subscription Renewal

The default output parameters for the **Subscription Renewal** task are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 39. Subscription Renewal

	Internal Name	Display Name
1	AcquisitionNumber	Acquisition number
2	AcquisitionCode	Acquisition code
3	PurchaseOrderNo	Purchase order no.
4	VendorCode	Vendor
5	VendorSubscriptionCode	Vendor subscription code
6	Price	Price
7	OrderDate	Order date
8	SubscriptionStartDate	Subscription p. start date
9	SubscriptionEndDate	Subscription p. end date
10	EproductTitle	e-Product title
11	EproductIdentifier	Identifier

Subscriptions for Review

The default output parameters for the **Subscriptions for Review** task are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 40. Subscriptions for Review

	Internal Name	Display Name
1	AcquisitionNumber	Acquisition number
2	AcquisitionCode	Acquisition code
3	PurchaseOrderNo	Purchase order no.
4	VendorCode	Vendor
5	VendorSubscriptionCode	Vendor subscription code
6	Price	Price
7	OrderDate	Order date
8	SubscriptionStartDate	Subscription start date
9	SubscriptionEndDate	Subscription end date
10	EproductTitle	e-Product title
11	EproductIdentifier	Identifier

Trial

Trial Participant Alerts

The default output parameters for the **Trial Participant Alerts** task are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 41. Trial Participant Alerts

	Internal Name	Display Name
1	EproductTitle	e-Product title
2	EproductIdentifier	e-Product identifier
3	StartDate	Start date
4	EndDate	End date
5	AlertType	Alert type

Table 41. Trial Participant Alerts

	Internal Name	Display Name
6	TrialCode	Trial code
7	Name	Trial participant name

Trial Management Process

The default output parameters for the **Trial Management Process** task are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 42. Trial Management Process

	Internal Name	Display Name
1	EproductTitle	e-Product title
2	EproductIdentifier	Identifier
3	StartDate	Start date
4	EndDate	End date
5	StatusCode	Status
6	DecisionDate	Decision Due Date
7	DecisionStatusCode	Decision

License

License Renewal

The default output parameters for the **License Renewal** task are listed in the table below.

NOTE:
The output file can be customized. For details, see **Customized Report Outputs** on page **293**.

Table 43. License Renewal

	Internal Name	Display Name
1	LicenseCode	License code
2	LicenseName	License name
3	Licensee	Licensee
4	Licensor	Licensor
5	RenewalTypeCode	renewal type
6	LocalLicenseNegotiator	Local license negotiator
7	EndDate	License end date
8	EproductTitle	e-Product title
9	EproductIdentifier	Identifier

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Overview of Loaders

This section includes:

- **About Verde Loaders** on page **315**
- **Loader Workflow** on page **318**
- **Creating Input Files** on page **319**
- **Loading Input Files to Verde** on page **320**
- **Defining Input File and Load Output Settings** on page **322**

About Verde Loaders

Verde's loaders enable you to load e-product records, e-product attribute records (such as acquisition and license records), library records, and organization records to the Verde database.

Verde supports the following loaders:

- **e-Constituent** – The e-constituent loader enables you to create and update e-constituent records, one package at a time. In addition, the e-constituent loader creates new work records for e-constituents that have no corresponding work records. The loader also indexes the loaded e-constituents and their work records.

  The e-constituent loader does not update work records, or remove work records or e-products from Verde's database. Before loading the e-constituents, ensure that the e-constituent's e-package exists in Verde. If the e-package does not exist, follow the instructions in **The Quick Add Wizard** on page **85** for creating a new e-package record.

- **e-Standalone** - The e-standalone loader enables you to create and update e-standalone records and their related interfaces. It is possible to create and update several e-standalone records, related to different interfaces, during one load. It is also possible to simultaneously create or update several e-standalone records that belong to the same interface.

In addition to creating and updating e-standalone records, the e-standalone loader creates new work records for e-standalone records if no corresponding work records exist in the KnowledgeBase. The loader also indexes the e-standalone records and their work records.

The e-standalone loader does not update work records or remove work records or e-products from Verde's database.

- **Acquisition** – The acquisition loader enables you to create and update acquisition records to the Verde database. When loading acquisition records, each record must be associated with a single e-product. Therefore, before loading acquisition records, ensure that the acquisition's associated e-product exists in the Verde database. The acquisition loader can also link an acquisition to a number of e-products.

  In addition to creating and updating acquisition records, the acquisition loader indexes the new acquisition records.

- **License** – The license loader enables you to create and update license records, including the license attachment in the Verde database. When loading license records, each new license record must be associated with a single e-product. Therefore, before loading license records, ensure that the license's associated e-product exists in the Verde database.

  In addition to creating and updating license records, the license loader indexes any new license records. The license loader loads licenses for all e-product types except e-print.

- **Library** – The library loader enables you to load library records of libraries belonging to your Verde instance. Additional loaders are used to load the contact records for each library, as well as the specific IP ranges for each library. Since library contacts and IP ranges are associated with a single library, ensure that the library record exists in the Verde database before you create library contacts and IP ranges for the library.

- **Organization** – The organization loader enables you to load records of organizations belonging to your Verde instance. Additional loaders are used to load the contact records for each organization. Since organization contacts are associated with a single organization, ensure that the organization record exists in the Verde database before you create the organization contacts for the organization.

- **Admin** – The admin loader enables you to load new admin records to the Verde database. When loading admin records, each record must be associated with a single e-product. Therefore, before loading admin records, ensure that the e-product associated with the admin record exists in the Verde database.

  An additional loader is used to load the local admin data for each admin record. Since local admin data is associated with a single admin record, ensure that this admin record exists in the Verde database before you create the local admin record.

- **Access** – The access loader enables you to create and update access records in the Verde database. When loading access records, each record must be associated with a single e-product and with a specific access type. Therefore, before loading an access record, ensure that the e-product associated with the record exists in the Verde database.

  An additional loader is used to load the access authorization data for each access record. Since access authorization data is associated with a single access record, ensure that this access record exists in the Verde database before you create the access authorization record.

Verde also supports the **Aleph Vendor Converter**, which enables Verde users who manage vendors in Aleph to convert vendor and vendor contact data to Verde standard organization and organization contact files. These files can then be loaded to the Verde database using the organization and organization contact loaders.

NOTE:

Although the relationships between the various loaders vary, the general workflow remains the same. Differences between the loaders are specified throughout the following sections, where relevant.

Loader Workflow

The general workflow when using the loaders is described in the following figure:

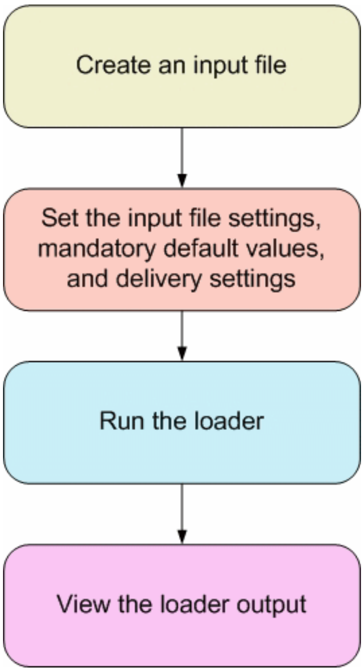

Figure 143: Loader Workflow

Using the loaders, you can upload an input file containing e-constituent, e-standalone, acquisition, license, library, organization, admin, or access records. Verde then does the following:

- Checks that the input file is in the correct format, including the heading names. For the detailed input file rules, see **Creating Input Files** on page **319**.
- Verifies that each row contains the mandatory information, and ensures that the dates and codes are in the correct format.
- Checks if a record matching the ID field exists in the database. This is discussed in more detail for each loader in **Creating Input Files** on page **319**.

Records that are validated are loaded into Verde's database. When a record is not validated, an error appears in the loader's log file. For more information on error possibilities, see **View Loader Output** on page **465**.

Creating Input Files

Before loading records into Verde, you must create an input file containing the data that needs to be loaded. Your input file can be an Excel file containing one worksheet or any comma delimited file (CSV).

An input file can be created based on one of Verde's input file templates. The input file contains columns for all of the available input file fields, with a header row for each column.

The input file fields are in one of the following formats:

- **Date** – All dates in the input files should be in the following format: dd/mm/yyyy.

  If the English (Unites States) language is set on your PC, the loaders may err in handling the dates as following: If the first two numbers in the date are smaller than 12, the dates are interpreted as mm/dd/yyyy instead of dd/mm/yyyy.

  To avoid this problem, change the Language setup of the PC language to English (United Kingdom) as follows:

  a Click **Start** and select **Control Panel**.

  b Double-click the **Regional and Language Options** button. The Regional and Language Options dialog box opens.

  c In the **Regional Options** tab, in the Standards and Formats box, change the language to English (United Kingdom).

  d Restart the computer, if required.

- **Code** – For input file fields that accept a code value, enter the display name of the code. Verde automatically translates the display name into the relevant code.

NOTE:
The display name can be modified from the **Code Tables** tab in the Admin module. For details, see **The Code Tables Tab** on page **515**.

- **Boolean** – For fields that accept a Boolean value, enter `True` or `False`, `1` or `0`, `Yes` or `No`.
- **Text** – Free text, limited to the field length.
- **Integer** – A number.
- **Float** – A number with two digits after the decimal point.
- **VarChar** – Text of an indeterminate length.

The template input files are located at /exlibris/verde/<v2_1>/verde/examples_and_templates, where `v2` is Verde's current version number and `1` is the slot where the system is installed on a specific port. For more information, consult your system administrator.

The input file fields and values for each of the following loaders are described in the following sections:

- e-Constituent – See **e-Constituent Input Files** on page **327**.
- e-Standalone – See **e-Standalone Input Files** on page **345**.
- Acquisitions – See **Acquisition Input Files** on page **365**.
- Licenses – See **License Input Files** on page **375**.
- Libraries – See **About Library Input Files** on page **413**.
- Library Contacts – See **Library Contact Input Files** on page **419**.
- Library IPs – See **Library IP Input Files** on page **422**.
- Organizations – See **About Organization Input Files** on page **425**.
- Organization Contacts – See **Organization Contact Input Files** on page **429**.
- Admin – See **About Admin Input Files** on page **435**.
- Local Admin – See **About Local Admin Input Files** on page **444**.
- Access – See **About Access Input Files** on page **447**.
- Access Authorization – See **About Access Authorization Input Files** on page **460**.

The Aleph Vendor Converter is described in the *Verde-Aleph Interoperability Guide*.

Loading Input Files to Verde

The following steps describe how to load input files to Verde.

To load input files to Verde:

1. Create an input file for the type of loader that you are loading. You can base the input file on Verde's input file templates, which are located in the following directory:

   `/exlibris/verde/<v2_1>/verde/examples_and_templates`

   where `v2` is Verde's current version number and `1` is the specific port on which the system is installed. For more information, consult your system administrator.

   For more information on creating input files, see **Creating Input Files** on page **319**.

2 From the **Select a tool** drop-down list in the KB Tools module, select **Loader**. The Loader menu appears.

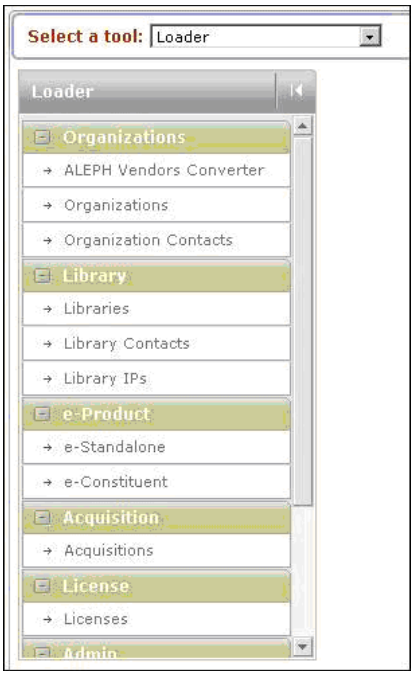

Figure 144: Loader Menu

3 From the **Loader** menu, select the type of loader that you want to use to load records. A screen displaying the loader's **Task Properties** and **Delivery Properties** appears.

NOTE:
You can view this screen only if you have permissions to use the loader you selected.

4 Under **Task Properties**, enter the required values. For details on the fields that appear in this section, see **Defining Input File and Load Output Settings** on page 322.

5 Under **Delivery Properties**, specify the properties of the output report, as described in the following table:

Table 44. Delivery Property Values

Field	Values
File format	The format of the output report that is sent. The possible formats are CSV, PRN, or XML files.

Table 44. Delivery Property Values

Field	Values
E-mail	An e-mail address to which the output report is sent. To enter more than one address, separate the addresses with semicolons (;).
Locally defined output	The format of the output report that is displayed in Verde. The default value is **Verde format**. For information on the **Default format** option (available for some loaders), see **About Customizing Report Outputs** on page **293**.
Report name	The name of the output report.

6 Click **Run** to run the loader immediately and upload the external input file.

NOTE:
For information on viewing the loader's output file, see **Viewing Loader Output** on page **465**. For information on output file customization, see **Customized Report Outputs** on page **293**.

Defining Input File and Load Output Settings

The following fields are available in the **Task Properties** section for all loaders, except the acquisition loader:

Table 45. Common Task Property Fields

Field	Description
Update database	If this check box is selected, the data is loaded to the database. If this check box is cleared, a report is generated, but the data is not actually loaded to the database. This process is useful for validating the input file. It is recommended that you run the loading the first time as a report.
Input file	Choose one of the following two upload options, according to the location of your input file: ■ **File** – Click **Browse** to locate and select the input file, if the input file is located on your machine. ■ **Location on server** – Enter the path to the file, without browsing. **Note:** You cannot upload files that are larger than 400 MB.

The **organization contact** and **library contact** loaders contain the following additional field:

Table 46. Contacts Match Field

Field	Description
Contacts match	Determines whether Verde attempts to match contacts. The following options are available: ■ **Match input** – Verde attempts to match contacts with existing contacts in the database. If a match is found for the normalized contact name, Verde updates the contact information. Otherwise, Verde adds the contact as a new contact in the database. ■ **Add all as new** – Verde adds the contacts to the database as new contact records.

In addition, the **organization contact** loader contains the following field, which is similar to the additional field that appears for the **library IP** loader:

Table 47. Delete Existing Contacts/IPs Field

Field	Description
Delete existing contacts/IPs	If this check box is selected, the list of contacts/IPs is removed and the list of records in the input file replaces this list. If this check box is cleared, the list of contacts/IPs is added to the existing list.

The **e-constituent** loader contains the following additional fields:

Table 48. e-Constituent Loader Fields

Field	Description
Update package	If this check box is selected, the selected e-package record is updated with the e-product status, selection status, and activation dates inserted in the Task Properties window.
Select package	Enables you to select an e-package—to which the e-constituents in your input file belong—from the list of Verde e-packages. Note that this is a mandatory field.
Other fields	See **e-Constituent Input File Fields** on page **331** for an explanation of the other fields in this screen (e-Package status=e-Product status). Note that you should define values for these fields only if you want to activate the e-package and e-interface during the loading process.

For an explanation of the additional fields displayed for the **license** loader, see the descriptions for the following fields in **License Input File Fields** on page 377:

- **License start date**
- **License end date**
- **License status**
- **Licensee**
- **Licensor**
- **Renewal type**

The **acquisition** loader's Task Properties section contains the following fields:

Table 49. Acquisition Loader Fields

Field	Corresponding Input File Field	Description
Match Type	ID	See **Acquisition Input File Fields** on page 366 for a description of this field.
Input File Format	—	Select one of the following formats: ■ Excel (XLS) ■ CSV
Input File Path	—	Enter the full path of the location from which the input file should be loaded. For example: `/exlibris/verde/v2_2/verde/home/data/import/acq.xls` **Note:** You must save this file on the server.
Default Start Date	—	The date on which the acquisition becomes active. Enter a date or click the **Pick a Date** button to right of the text box to select a date from the calendar.
Default End Date	RenewCancDate	See **Acquisition Input File Fields** on page 366 for a description of this field.
Default Acquisitions Status	AcquisitionStatus	See **Acquisition Input File Fields** on page 366 for a description of this field.

Table 49. Acquisition Loader Fields

Field	Corresponding Input File Field	Description
Default Subscription Type	SubscriptionType	See **Acquisition Input File Fields** on page **366** for a description of this field.
Default Vendor	VendorCode	See **Acquisition Input File Fields** on page **366** for a description of this field.
Default Auto Renewal	AutoRenewal	See **Acquisition Input File Fields** on page **366** for a description of this field.

NOTE:

For information on the Aleph Vendor Converter settings, refer to the *Verde-Aleph Interoperability Guide*.

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e-Constituent Input Files

This section includes:

- **About e-Constituent Input Files** on page **327**
- **e-Constituent Input File Rules** on page **327**
- **e-Constituent Input File Fields** on page **331**
- **e-Constituent Loader Workflow** on page **342**

About e-Constituent Input Files

Verde's e-constituent loader loads the e-constituent input file. This input file loads e-constituent records that need to be added to, or updated in, the Verde database. The e-constituent records in the input file must belong to the same e-package. The input file contains columns for the fields in the e-constituent and work records, as well as rows for each record being loaded. The e-constituent input file columns are described in **Table 53**.

NOTE:

The e-constituent loader loads a single coverage per row. To load multiple coverage ranges, include a row per e-constituent-level coverage.
The e-constituent loader does not load institution-level coverage.

e-Constituent Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields, the input line is rejected and an error is logged in the output report.

- If you want to create a work record associated with the new e-constituent record, the following fields are mandatory:
  - title - main title
  - e-product type

  For example, the following sample input file creates a new e-constituent record with minimal information provided in the input file:

Table 50. Sample Input File

Match	Title – Main Title	e-Product Type
	Exlibris news	CONFERENCES

- To update an e-constituent record, the **Match** field is mandatory. The **Match** field is either a bibliographic or Verde identifier used to identify the e-constituent or work record. The following example illustrates how to update e-constituents with coverage information:

Table 51. Update e-Constituents with Coverage Information

Match	From Year	To Year
LEP_1203348384027_94	2001	2005
LWE_1194878929338_2535	2002	

  The first constituent is identified by e-product code, the second by workexpression code. Both constituents belong to the same package.

NOTE:
If a 13-digit ISBN number is used in the **Match** field, the system identifies it with its matching 10-digit ISBN number. Similarly, if a 10-digit ISBN number is used in the **Match** field, the system identifies it with its matching 13-digit ISBN number.

- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- All of the e-constituent record's fields can be updated, with the following exceptions:
  - The **Global coverage** and **JKEY** fields can never be updated in an e-constituent record.
  - The **Free/Subscription** field cannot be updated for an e-product that is from the Central KB.
  - The **SFX ID** field cannot be created or updated.

- Work records can never be updated or deleted by the e-constituent loader.

- For new records, when a field is left blank or a column is removed from the input file, the field is saved in the database as an empty field or as a default value.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.
- To remove a local coverage record, you must enter the value `<NULL>` in all the coverage fields (**From year**, **From month**, **From day**, and so forth. If you enter `<NULL>` in only some of the coverage fields, the local coverage record will not be removed.
- If you want to clear an e-product status, you must also clear the **Activation From** date and expiration dates (if they exist) by entering a `<NULL>` value into the appropriate cells.
- An input file row can contain a single, continuous coverage range that can include time intervals, and/or ranges of volumes and/or issues.

  For example, for specifying a coverage range for a title with a volume number and month, you can enter the volume number range and month range in the same row in the input file.

  For e-constituents that have non-continuous coverage ranges, include a row for each additional range. For example, when an e-constituent has coverage ranges from Volume 1 to Volume 15 and Volume 18 to Volume 20, the e-constituent's record contains the first coverage range in the input file record. The second coverage range is added in an additional record, which includes only the **Match** field and coverage range fields.

Table 52. e-Constituents with Non-Continuous Coverage Ranges

Input File Row	Match Fields	Coverage to Volume
1	0110-0990	1
2	0110-0990	18

- If you add new local coverage records, the existing coverage records will be removed.
- Dependent e-constituent records that are part of aggregator packages inherit status information and dates from the e-constituents' parent e-packages. You should therefore not include e-product status or dates when loading dependent e-constituent records to an aggregator package.
- Independent e-constituents do not inherit the e-product status, the selection status, and the activation dates from the parent aggregator package and are

essentially like e-constituents in selective packages. Therefore, independent e-constituent records that belong to aggregator packages may have e-product and selection statuses and activation dates different from those of the package.

- To update the status information for e-constituent records that belong to aggregator packages, the e-constituents should have the Independent status. The status can be set to Dependent/Independent using the Dependency Status column.

e-Constituent Input File Fields

The following table describes the fields of the e-constituent loader's input file.

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Match (mandatory for updated e-constituent records)	Code	Work, e-Product		The match type can be one of the following: Bibliographic Identifier: ■ ISSN ■ eISSN ■ ISBN ■ eISBN Verde Identifier: ■ SFX ID of the associated e-product (appears in the **Interoperability** tab of the e-product's page) ■ Verde e-product code ■ Verde work expression code **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	MARCXML/ WORKEXPRESSION/ WORKEXPCODE/ WORKEXPRESSION EPRODUCTCODE/ EPRODUCT G_SFXID/ EPRODUCT

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Title – main title (mandatory for work records associated with new e-constituent records)		Work		The title of the e-constituent being added to the Verde database.	MARCXML/ WORKEXPRESSION
CJK Language (mandatory for work records with main title in Chinese or Korean)	Code	Work		If main title is in Chinese or Korean, insert `CHI`, `JPN`, or `KOR`. If the field is empty, `eng` is saved by default.	MARCXML/ WORKEXPRESSION
Title – sub-title		Work		The sub-title of the e-constituent being added to the Verde database.	MARCXML/ WORKEXPRESSION
Title – number of part		Work		The part number included in the title of the e-constituent being added to the Verde database.	MARCXML/ WORKEXPRESSION
e-Product type (mandatory for work records associated with new e-constituent records)	Code	Work		The type of resource: ■ journal ■ book ■ citation ■ dissertation For a full list of the work record e-product types, see the table, **Work Record e-Product Types** on page **82**.	MARCXML/ WORKEXPRESSION

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
ISSN		Work		The International Standard Serial Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION
EISSN		Work		The International Standard Serial Number for the electronic version of a Serial title. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION
ISBN		Work		The International Standard Book Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
eISBN		Work		The International Standard Book Number for the electronic version of a book. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION
Abbreviated title		Work		The e-constituent's abbreviated title.	MARCXML/ WORKEXPRESSION
Imprint – place of publisher		Work		The place of publishing.	MARCXML/ WORKEXPRESSION
Imprint - publisher		Work		The name of the publisher.	MARCXML/ WORKEXPRESSION
e-Product format		Work		The format of the resource.	MARCXML/ WORKEXPRESSION
Local category – main category		Work		The main category of the resource assigned locally.	MARCXML/ WORKEXPRESSION
Local category – sub category		Work		The sub category of the resource assigned locally.	MARCXML/ WORKEXPRESSION
Local field <number>	Text	Work		One of the e-product's nine local fields.	MARCXML/ WORKEXPRESSION

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Selection status	Code	e-Product	30	The selection status of the e-product. You can select from the following possible values: ■ Evaluation ■ Review ■ Approved ■ Rejected ■ Final Approval ■ Null These values can be customized by editing the code table. **Note**: For dependent e-constituents related to an aggregator package, it is impossible to set a selection status that is different from the parent's selection status. In such cases, leave this field empty.	G_PROCUREMENT STATUS/EPRODUCT

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
e-Product status	Code	e-Product	30	The implementation status of the e-product. You can select from the following possible values: ■ Implementation 1 ■ Implementation 2 ■ Implementation 3 ■ Production ■ Withdrawn ■ Null These values can be customized by editing the value in the code table. If this field contains a value, the **Activation from date** field must contain a value. **Note:** For dependent e-constituents related to an aggregator package, it is impossible to set a selection status that is different from the parent's selection status. In such cases, leave this field empty.	G_EPRODUCT STATUS/EPRODUCT

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Activation from date	Date	e-Product	8	The date from which the e-product is active. If this field contains a value, the **e-Product status** field must contain a value. **Note:** For dependent e-constituents related to an aggregator package, it is impossible to set an activation from date that is different from the parent's activation from date. In such cases, leave this field empty.	ACTIVATIONFROM DATE/EPRODUCT
Expiration date	Date	e-Product	8	The date until which the e-product is active. If this field contains a value, the **e-Product status** and **Activation from date** fields must contain values. Note: For dependent e-constituents related to an aggregator package, it is impossible to set an expiration date that is different from the parent's expiration date. In such cases, leave this field empty.	ACTIVATIONTO DATE/EPRODUCT
Concurrent number of users	Integer	e-Product	10	Concurrent number of users for e-constituent.	CONCURRENT NUMBEROFUSERS/ EPRODUCT

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Sponsoring library	Text	e-Product	100	The library name of the library responsible for the e-product. **Note:** The library inserted into the input file should already be defined as a library in Verde.	SPONSERING LIBRARY/ EPRODUCT
Library contact	Text	e-Product	100	The library contact name of the contact in the library responsible for the e-product. **Note:** The library contact inserted into the input file should already be defined as a library contact in Verde.	MAINCONTACT/ EPRODUCT
Public note	Text	e-Product	1000	A note displayed in external applications such as the OPAC, A-Z lists, and SFX. Currently not functional.	COM_PUBLIC NOTE/EPRODUCT
Internal note	Text	e-Product	1000	A note displayed to Verde staff only.	G_PRIVATENOTE/ EPRODUCT
SFX ID	Text	e-Product	20	Pointer to a matching record in SFX. The SFX ID cannot be created or updated.	G_SFXID/ EPRODUCT
MetaLib ID	Text	e-Product	20	Pointer to a matching record in MetaLib.	G_METALIBID/ EPRODUCT
ID number	Text	e-Product	20	Pointer to a record ID in an alternate system.	G_OTHERID/ EPRODUCT

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
ID source	Text	e-Product	20	The name of the alternate system.	G_OTHERSOURCE/ EPRODUCT
Title key	Text	e-Product	20	A locally defined, abbreviated title that can be added to the URL for direct linking.	S_C_TITLEKEY/ EPRODUCT
Suppress	Boolean	e-Product	1	Indicates if the e-product is hidden from public view. Currently not functional.	COM_SUPPRESS/ EPRODUCT
Free	Code	e-Product	35	Indicates whether the available resource is free of charge. The possible values are: ■ Free ■ Subscription	ER_FREEOR SUBSCRIPTION/ EPRODUCT
From year	Text	e-Product	4	The year from which the electronic version is available.	COVERAGEFROM YEAR/COVERAGE
From month	Text	e-Product	2	The month from which the electronic version is available.	COVERAGEFROM MONTH/ COVERAGE
From day	Text	e-Product	2	The day from which the electronic version is available.	COVERAGEFROM DAY/COVERAGE
From volume	Text	e-Product	20	The volume from which the electronic version is available.	COVERAGEFROM VOL/COVERAGE
From issue	Text	e-Product	20	The issue from which the electronic version is available.	COVERAGEFROM ISSUE/COVERAGE
To volume	Text	e-Product	20	The volume until which the electronic version is available.	COVERAGETOVOL/ COVERAGE

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
To issue	Text	e-Product	20	The issue until which the electronic version is available.	COVERAGETO ISSUE/COVERAGE
To year	Text	e-Product	4	The year until which the electronic version is available.	COVERAGETO YEAR/COVERAGE
To month	Text	e-Product	2	The month until which the electronic version is available.	COVERAGETO MONTH/ COVERAGE
To day	Text	e-Product	2	The day until which the electronic version is available.	COVERAGETODAY/ COVERAGE

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Libraries names	Text	e-Product	900	The names of the libraries for which the e-product is active. Enter the library code; multiple library codes should have a comma between them. A library is registered only if the library settings of the e-constituent are different from those of its e-package. Update of a library's record will remove the existing library record. For more information on inheritance, see **Inheritance of e-Product Attribute Records** on page 63. **Note:** It is impossible to define library settings that are different from the parent settings for dependent e-constituents related to an aggregator package. In such cases, leave this field empty.	RELATED LIBRARIES/ EPRODUCT LIBRARY
Embargo operator	Text	e-Product	1	The type of embargo: ■ From X months ■ Up to X months Possible values are **+** and **-**.	GLOBALEMBARGO OPERATOR/ EPRODUCT

Table 53. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Embargo – months	Integer	e-Product	4	The number of months that are embargoed locally.	GLOBALEMBARGO NUMBEROF MONTHS/ EPRODUCT
Holdings note	Text	e-Product	255	A note regarding the holdings.	ER_PR_HOLDINGS NOTE/EPRODUCT
ILS holdings ID	Text	e-Product	255	Link to MARC record in ILS.	ER_PR_HOLDINGS INILS/EPRODUCT
Dependency Status	Text	e-Product		The possible values are **Dependent** and **Independent**. Insert the value only for e-constituents that are related to an aggregator package. If the field is empty and e-constituents in the input file are related to an aggregator package, the **Dependent** value is used.	C_DEPENDENCY STATUS/EPRODUCT

e-Constituent Loader Workflow

After Verde verifies that the e-constituent input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the Match field, as follows:

- If the **Match** field is an e-product, Verde searches the database for a matching e-product. If the e-product is found and is part of the package being loaded, Verde updates the e-product record. If no e-product record is found, and work information is provided in the input file, Verde creates both work and e-product records. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.
- If the **Match** field is a work record, Verde searches for a matching work record. If the work record is found and one of the associated e-constituents is an e-constituent of the package being loaded, Verde updates the e-constituent record. If no matching e-constituent is found for the work record, Verde creates a new e-constituent record linked to the work record.

If no work record is found, Verde creates both the work records and its linked e-constituent record.

- For new records that include unique identifiers such as ISSN, eISSN, ISBN, and eISBN, Verde performs duplication checking. If the identifier does not exist in Verde's KB, Verde creates both work and e-product records. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.

NOTE:

If new records include 13-digit ISBN numbers, Verde knows how to match them with their corresponding 10-digit ISBN numbers. Similarly, if new records include 10-digit ISBN numbers, Verde knows how to match them with their corresponding 10-digit ISBN numbers.

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e-Standalone Input Files

This section includes:

- **About e-Standalone Input Files** on page **345**
- **e-Standalone Input File Rules** on page **346**
- **e-Standalone Input File Fields** on page **349**
- **e-Standalone Loader Workflow** on page **362**

About e-Standalone Input Files

Verde's e-standalone loader loads the e-standalone input file. This file loads e-standalone records that need to be added to, or updated in the Verde database. The input file contains columns for the fields in the e-standalone e-product, as well as work records and rows for each record being loaded. A new e-standalone record can have its own e-interface record, or it can be linked to an e-interface record that is already in the database, or a record that was created in previous rows of the same input file. The input file thus includes several fields for the e-interface record. The e-standalone input file's columns are described in **Table 59**.

NOTE:

The e-standalone loader loads a single coverage per row. To load multiple coverage ranges, include a row per e-standalone-level coverage.
The e-standalone loader does not load institution-level coverage.

e-Standalone Input File Rules

Before loading your input file, ensure that the file follows these rules:

- All of the fields in the mandatory columns contain values. When an input line does not contain a value in a mandatory field, the line is rejected and an error is logged in the output report.
- If you are creating new e-standalone and e-interface records and want to create work records associated with these records, the following fields are mandatory:
  - title - main title
  - e-product type
  - interface name

  For example, the following sample input file creates two new e-standalone records associated with two new e-interface records:

Table 54. Creating Two e-Standalone Records

Match	Match Interface	Title-Main Title	e-Product Type	Interface Name
		Advanced SQL database	DATABASE	SQL Database interface
		CSA EconLit	DATABASE	CSA Illumina

- If you are adding new e-standalone records to existing e-interface records and want to create work records associated with the e-standalone records, the following fields are mandatory:
  - title - main title
  - e-product type
  - match interface – in order to identify the e-interface

  The following example illustrates how to add a new e-standalone (Football conference) record to an existing e-interface record (identified by CEP_1123333869159_611111):

Table 55. Adding e-Standalone Record to Existing e-Interface Record

Match	Match Interface	Title-Main Title	e-Product Type
	CEP_1123333869159_611111	Football conference	CONFERENCE

- To update an e-standalone record, the Match field is mandatory. The Match field is either a bibliographic or a Verde identifier used to identify the e-standalone or work record.

  The following example illustrates how to update the selection status of an existing e-standalone record to **Evaluation**:

Table 56. Updating Selection Status to “Evaluation”

Match	Match Interface	Selection Status
LEP_1202041814089_74		Evaluation
CWE_1123328663096_182485		Rejected

- You can link several new e-standalone records to the same e-interface record in one input file. If the e-interface record does not exist in the Verde KnowledgeBase before the loading process, specify the name of the new e-interface record in the **Interface Name** column for the first e-standalone record appearing in the input file. Include the interface name in **<>** brackets in the **Match Interface** column for all subsequent e-standalone records in the same input file.

  The following example illustrates how to create six new e-standalone records linked to the new e-interface CSA Illumina record:

Table 57. Create Six e-Standalone Records Linked to the CSA Illumina Record

Match	Match Interface	Title-Main Title	e-Product Type	Interface Name
		CSA Aerospace & High Technology database	DATABASE	CSA Illumina
	<CSA Illumina>	CSA Agricultural and Environmental Biotechnology Abstracts	DATABASE	
	<CSA Illumina>	CSA Aluminum Industry Abstracts	DATABASE	
	<CSA Illumina>	CSA ANTE: Abstracts in New Technologies and Engineering	DATABASE	

Table 57. Create Six e-Standalone Records Linked to the CSA Illumina Record

Match	Match Interface	Title-Main Title	e-Product Type	Interface Name
	<CSA Illumina>	CSA ASFA 3: Aquatic Pollution and Environmental Quality	DATABASE	
	<CSA Illumina>	CSA Bacteriology Abstracts (Microbiology B)	DATABASE	

- The input file columns can be rearranged, and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- All of the e-standalone record's fields can be updated, with the following exceptions:
  - The **Global coverage** and **JKEY** fields can never be updated in an e-standalone record.
  - The **SFX ID** and **Free/Subscription** fields cannot be updated for an e-standalone that is from the Central KB.
- For new records, when a field is left blank or a column is removed from the input file, the field is saved in the database as an empty field or as a default value.
- If the same identifier already exists in database, the row will be rejected.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.
- To remove a local coverage record, you must enter the value `<NULL>` in all the coverage fields (**From year**, **From month**, **From day**, and so forth. If you enter `<NULL>` in only some of the coverage fields, the local coverage record will not be removed.
- An input file row can contain a single continuous coverage range that can include time intervals and/or ranges of volumes and/or issues.

  For example, for specifying a coverage range for a title with a volume number and month, you can enter the volume number range and month range in the same row in the input file.

  For e-standalones that have non-continuous coverage ranges, include a row for each additional range. For example, when an e-standalone has coverage ranges from Volume 1 to Volume 15 and Volume 18 to Volume 20, the e-standalone's record contains the first coverage range in the input file record.

The second coverage range is added in an additional record, which includes only the **Match** field and the coverage range fields.

Table 58. e-Standalone with Non-Continuous Coverage Range

Input File Rows	Match Fields	Coverage from Volume	Coverage to Volume
1	0110-0990	1	15
2	0110-0990	18	20

- If you add new local coverage records, the existing coverage records will be removed.
- Activation data can be updated only for e-products managed in Verde. If an e-standalone has an **Update target** value of **SFX**, activation data cannot be updated.

e-Standalone Input File Fields

The following table describes the fields of the e-standalone loader's input file.

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table

Match
 	
(mandatory for updated e-standalone records)
		e-Product, Work		The match type can be one of the following:
				■ Bibliographic identifier:
				  ■ ISSN
				  ■ eISSN
				  ■ ISBN
				  ■ eISBN
				■ Verde Identifier:
				  ■ SFX ID of the associated e-product (appears in the **Interoperability** tab of the e-product's page)
				  ■ Verde e-product code
				  ■ Verde work expression code
					EPRODUCTCODE/ EPRODUCT

Match (cont.)				**Note:** If you choose to use an SFX ID as the unique identifier of each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Match interface (mandatory for new e-standalone records linked to existing e-interface records)	Code	e-Product		Verde e-product code of e-interface	EPRODUCTCODE/ EPRODUCT
Title – main title (mandatory for new work records associated with new e-standalone records)		Work		The title of the e-standalone being added to the Verde database.	MARCXML/ WORKEXPRESSION
Title – sub title		Work		The sub-title of the e-standalone being added to the Verde database.	MARCXML/ WORKEXPRESSION
CJK Language (mandatory for work records whose main title is in Chinese or Korean)	Code	Work		If the main title is in Chinese or Korean, insert `CHI` or `KOR` accordingly. If the field is empty, the value `eng` is used by default.	MARCXML/ WORKEXPRESSION
Title – number of part		Work		The part number included in the title of the e-constituent being added to the Verde database.	MARCXML/ WORKEXPRESSION
e-Product type (mandatory for work records associated with new e-standalone records)	Code	Work		The type of resource: ■ database ■ conference ■ citation ■ dissertation For a full list of the work record e-product types, see the table, **Work Record e-Product Types** on page 82.	MARCXML/ WORKEXPRESSION

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
ISSN		Work		The International Standard Serial Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION
EISSN		Work		The International Standard Serial Number for the electronic version of a Serial title. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION
ISBN		Work		The International Standard Book Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
eISBN		Work		The International Standard Book Number for the electronic version of a book. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	MARCXML/ WORKEXPRESSION
Abbreviated title		Work		The e-standalone's abbreviated title.	MARCXML/ WORKEXPRESSION
Imprint – place of publisher		Work		The place of publishing.	MARCXML/ WORKEXPRESSION
Imprint - publisher		Work		The name of the publisher.	MARCXML/ WORKEXPRESSION
e-Product format		Work		The format of the resource.	MARCXML/ WORKEXPRESSION
Local category – main category		Work		The main category of the resource assigned locally.	MARCXML/ WORKEXPRESSION
Local category – sub category		Work		The sub-category of the resource assigned locally.	MARCXML/ WORKEXPRESSION
Local field <number>	Text	Work		One of the e-product's nine local fields.	MARCXML/ WORKEXPRESSION
LCCN		Work		Library of Congress Control number. A unique number assigned to a MARC record by the Library of Congress.	MARCXML/ WORKEXPRESSION

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
CODEN		Work		The CODEN designation for a bibliographic title. (The CODEN is assigned by the International CODEN Section of Chemical Abstracts Service.)	MARCXML/ WORKEXPRESSION
Author- name		Work		A personal name used as a main entry in a bibliographic record.	MARCXML/ WORKEXPRESSION
Author- sub unit		Work		Numeration. A Roman numeral or a Roman numeral and a subsequent part of a forename.	MARCXML/ WORKEXPRESSION
Author – number of part		Work		Number of part/section of a work.	MARCXML/ WORKEXPRESSION
Author – name of part		Work		Name of part/section of a work.	MARCXML/ WORKEXPRESSION
Corporate author - name		Work		A corporate name used as a main entry in a bibliographic record.	MARCXML/ WORKEXPRESSION
Corporate author - Numerator		Work		Subordinate unit	MARCXML/ WORKEXPRESSION
Corporate author – number of part		Work		Number of part/ section/meeting. A number designation for a meeting entered under a corporate name or for a part or section of a work used with a title in a name/ title field	MARCXML/ WORKEXPRESSION

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Corporate author – name of part		Work		Name of part/section of a work. A name designation of a part or section of a work used with a title in a name/ title field	MARCXML/ WORKEXPRESSION
Display title		Work		Display title.	MARCXML/ WORKEXPRESSION
Update Frequency		Work		The current stated publication frequency of either an item or an update to an item. Dates are included when the beginning date of the current frequency is not the same as the beginning date of publication.	MARCXML/ WORKEXPRESSION
Time Span		Work		Information on the type of report and the period covered by the report.	MARCXML/ WORKEXPRESSION
Coverage note		Work		Coverage note	MARCXML/ WORKEXPRESSION
Description		Work		Unformatted information that describes the scope and general contents of the materials. This could be a summary, abstract, annotation, review, or only a phrase describing the material.	MARCXML/ WORKEXPRESSION
Copyright		Work		Terms governing use and reproduction. Usually, the text of a legal or official statement of restrictions.	MARCXML/ WORKEXPRESSION

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Language		Work		Textual information on the language of the described materials.	MARCXML/ WORKEXPRESSION
Continues		Work		Information concerning the immediate predecessor of the target item (chronological relationship).	MARCXML/ WORKEXPRESSION
Continues By		Work		Information concerning the immediate successor to the target item (chronological relationship).	MARCXML/ WORKEXPRESSION

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
e-Product status	Code	e-Product	30	The implementation status of the e-product. You can select from the following possible values: ■ Implementation 1 ■ Implementation 2 ■ Implementation 3 ■ Production ■ Withdrawn ■ Null These values can be customized by editing the code table. If this field contains a value, the **Activation from date** field must contain a value. When the e-standalone is activated during loading, if the related e-interface is inactive, it is given an e-product status of **Production** and an **Activation from date** that is the same as the **Activation from date** of the e-standalone.	G_EPRODUCTSTATUS/EPRODUCT

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Selection status	Code	e-Product	30	The selection status of the e-product. You can select from the following possible values: ■ Evaluation ■ Review ■ Approved ■ Final Approval ■ Rejected ■ Null These values can be customized by editing the code table.	G_PROCUREMENTSTATUS/EPRODUCT
Activation from date	Date	e-Product	8	The date from which the e-product is active. If this field contains a value, the **e-Product status** field must contain a value.	ACTIVATIONFROMDATE/EPRODUCT
Expiration date	Date	e-Product	8	The date until which the e-product is active. If this field contains a value, the **e-Product status** and **Activation from date** fields must contain values.	ACTIVATIONTODATE/EPRODUCT
Concurrent number of users	Integer		10	Concurrent number of users for e-standalone.	CONCURRENTNUMBEROFUSERS/ EPRODUCT
Sponsoring library	Text	e-Product	100	The library name of the library responsible for the e-product. **Note:** The library inserted into the input file should already be defined as a library in Verde.	SPONSERINGLIBRARY/EPRODUCT

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Library contact	Text	e-Product	100	The library contact name of the contact in the library responsible for the e-product. **Note:** The library contact inserted into the input file should already be defined as a library contact in Verde.	MAINCONTACT/ EPRODUCT
Public note	Text	e-Product	1000	A note displayed in external applications such as the OPAC, A-Z lists, and SFX. Currently not functional.	COM_PUBLICNOTE/ EPRODUCT
Internal note	Text	e-Product	1000	A note displayed to Verde staff only.	G_PRIVATENOTE/ EPRODUCT
SFX ID	Text	e-Product	20	Pointer to a matching record in SFX. For records that are part of the Global Knowledge Base, this value is set and cannot be updated manually.	G_SFXID/EPRODUCT
MetaLib ID	Text	e-Product	20	Pointer to a matching record in MetaLib.	G_METALIBID/ EPRODUCT
ID number	Text	e-Product	20	Pointer to a record ID in an alternate system.	G_OTHERID/ EPRODUCT
ID source	Text	e-Product	20	The name of the alternate system.	G_OTHERSOURCE/ EPRODUCT
Title key	Text	e-Product	20	A locally defined, abbreviated title that can be added to the URL for direct linking.	S_C_TITLEKEY/ EPRODUCT
Suppress	Boolean	e-Product	1	Indicates if the e-product is hidden from public view. Currently not functional.	COM_SUPPRESS/ EPRODUCT

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Free	Code	e-Product	35	Indicates whether the available resource is free of charge. The possible values are: ■ Free ■ Subscription	ER_FREEORSUBSCRIPTION/EPRODUCT
From year	Text	e-Product	4	The year from which the electronic version is available.	COVERAGEFROMYEAR/COVERAGE
From month	Text	e-Product	2	The month from which the electronic version is available.	COVERAGEFROMMONTH/COVERAGE
From day	Text	e-Product	2	The day from which the electronic version is available.	COVERAGEFROMDAY/COVERAGE
From volume	Text	e-Product	20	The volume from which the electronic version is available.	COVERAGEFROMVOL/COVERAGE
From issue	Text	e-Product	20	The issue from which the electronic version is available.	COVERAGEFROMISSUE/COVERAGE
To volume	Text	e-Product	20	The volume until which the electronic version is available.	COVERAGETOVOL/ COVERAGE
To issue	Text	e-Product	20	The issue until which the electronic version is available.	COVERAGETOISSUE /COVERAGE
To year	Text	e-Product	4	The year until which the electronic version is available.	COVERAGETOYEAR /COVERAGE
To month	Text	e-Product	2	The month until which the electronic version is available.	COVERAGETOMONTH/COVERAGE
To day	Text	e-Product	2	The day until which the electronic version is available.	COVERAGETODAY/ COVERAGE

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Embargo operator	Text	e-Product	1	The type of embargo: ■ From X months ■ Up to X months Possible values are **+** and **-**.	GLOBALEMBARGO OPERATOR/ EPRODUCT
Embargo – months	Integer	e-Product	4	The number of months that are embargoed locally.	GLOBALEMBARGO NUMBEROF MONTHS/ EPRODUCT
Holdings note	Text	e-Product	255	A note regarding the holdings.	ER_PR_HOLDINGSN OTE/EPRODUCT
ILS holdings ID	Text	e-Product	255	Link to MARC record in ILS.	ER_PR_HOLDINGSI NILS/EPRODUCT
Libraries names	Text	e-Product	900	The names of the libraries for which the e-product is active. Enter the library code; multiple library codes should have a comma between them. Update of a library record will remove the existing library record.	RELATED LIBRARIES/ EPRODUCT LIBRARY
Availability	Code	e-Product	10	Availability status. The possible values are: ■ Up ■ Down If the field contains the value **Down**, the **Availability from** and **Availability to** fields must contain values.	COM_ACTIVITY STATUS/EPRODUCT
Availability from	Date	e-Product		Start date of the period when the e-product will be unavailable.	G_ACTIVITY STATUSDATE FROM/EPRODUCT
Availability to	Date	e-Product		End date of the period when the e-product will be unavailable	G_ACTIVITY STATUSDATETO/ EPRODUCT

Table 59. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Availability note	Text	e-Product	1000	Note to accompany availability status.	COM_ACTIVITY STATUSNOTE/ EPRODUCT
Interface name (mandatory for work records associated with new e-interface records, when creating new e-standalone records)	Text	Work		Title of interface for loaded e-standalone.	MARCXML/ WORKEXPRESSION
Update target	Code	e-Product	20	Indicates the system for update. The possible values are: ■ Null ■ SFX ■ SFX and MetaLib ■ MetaLib ■ ILS **NOTE:**	G_UPDATE TARGET/EPRODUCT

e-Standalone Loader Workflow

After verifying that the e-standalone input file is in the correct format and that each of the rows contains the mandatory information, Verde checks whether the Match field contains a value.

- If the Match field contains a value, Verde searches for a record in the database that matches the Match field, as follows:
  - If the Match field is an e-product, Verde searches the database for a matching e-standalone. If the e-standalone is found, Verde updates the e-standalone record. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.

- If the Match field is a work record, Verde searches for a matching work record.
  - If the work record is found and one of the associated e-products is an e-standalone, Verde updates the e-standalone record.
  - If the work record is found and there is no associated e-standalone, Verde searches for a matching e-interface.
  - If a matching e-interface is found, Verde creates the e-standalone and connects it to the e-interface.
  - If a matching e-interface is not found, but the e-interface work information is provided in the input file, Verde creates both a work and an e-product record for the e-standalone and e-interface.
  - If a matching e-interface is not found and no interface work information is provided in the input file, Verde rejects the row in the input file and writes an error to the loader's output file.
- If the Match field is empty, Verde checks whether all fields that are mandatory for a new e-standalone contain values. If they do, the new e-standalone is created.
- For new records that include unique identifiers such as ISSN, eISSN, ISBN, eISBN, Verde performs duplication checking. If the identifier does not exist in the Verde KB, Verde creates both work and e-product records. Otherwise, Verde rejects the row in the input file and writes an error to the loader’s output file.

NOTE:

If new records include 13-digit ISBN numbers, Verde knows how to match them with their corresponding 10-digit ISBN numbers. Similarly, if new records include 10-digit ISBN numbers, Verde knows how to match them with their corresponding 10-digit ISBN numbers.

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Acquisition Input Files

This section includes:

- **About Acquisition Input Files** on page **365**
- **Acquisition Input File Rules** on page **365**
- **Acquisition Input File Fields** on page **366**
- **Acquisition Loader Workflow** on page **373**

About Acquisition Input Files

Verde's acquisition loader loads the acquisition input file. This input file loads acquisition records that need to be added to the Verde database. Each record must be associated with a single e-product, which is identified by the value in the Match field. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The acquisition input file's columns are described in **Table 60**.

Acquisition Input File Rules

- An acquisition with the status **Active** should have start and end dates. The start date cannot be later or the same as the end date.
- For a new or an updated acquisition with the status **Active** or **Renewed**, Verde checks the overlapping of dates. If an overlap exists with an acquisition related to the same e-product, the creation or update is rejected. The same is true for acquisitions that are linked to other e-products with additional acquisitions.
- The current date is saved if either of the following is true:
  - The acquisition is new, and the acquisition status is **Renewed** or **Cancelled**;

- The acquisition is updated, the acquisition status is **Renewed** or **Cancelled**, and the renewal/cancellation date is <null>.

- The **Advance Notice** date is calculated by the system by subtracting the **Advance notice period** from the **Acquisition end date**.
- For an updated acquisition, if there are related local acquisitions, verify that the sum of the **Cost share** values of each related local acquisition is not greater than the final price of the acquisition.
- Default values specified in Task Properties are relevant only for new acquisitions that do not have appropriate values in the input file.
  - If a default value is specified, but there is a value for the same field in the input file, the default value is ignored.
  - If a default value is specified and the input value for the field is missing, the default value is saved.

Acquisition Input File Fields

The following table describes the fields of the acquisition loader's input file.

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Match	Text		For a new acquisition, must be one of the following: ■ Title ■ Workexpression code ■ Verde e-product code ■ SFX ID of the associated e-product (appears in the **Interoperability** tab of the e-product's page) For updating an acquisition, it must be: ■ Acquisition code	■ MARCXML,/ WORKEXPRESSIO N ■ WORKEXPCODE/ ■ WORKEXPRESSION ■ EPRODUCTCODE/ EPRODUCT ■ G_SFXID / EPRODUCT ■ AQUISITIONCODE/ ACQUISITION

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Match (cont.)			**Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in a general or number format, Excel does not store any digits past the 15th digit and the data is lost.	
Link to e-products			e-productcode or SFX ID of e-products that should be linked to the acquisition record.	■ EPRODUCTCODE/ EPRODUCT ■ G_SFXID/ EPRODUCT
Start date	Date	10	The start date of the acquisition record is the start date of the annual subscription.	SUBSCRIPTIONSTARTDATE/ SUBSCRIPTIONPERIOD
End date	Date	10	The end date of the acquisition record is the end date of the annual subscription.	SUBSCRIPTIONENDDATE/ SUBSCRIPTIONPERIOD

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Acquisitions status	Code	10	The possible values are the following: ■ New ■ Active ■ Approved ■ Cancelled ■ Denied ■ In process 1 ■ In process 2 ■ On hold ■ Ready to be approved ■ Renewed ■ Review ■ Sent for additional processing If left blank, the New status will be set. These fields can be customized by modifying the code table.	ACQUISITIONSTATUS/ ACQUISITION
Subscription open date	Date	10	The start date of the first subscription.	ORDERDATE/ ACQUISITION
Vendor	Text	100	The vendor providing the usage report. **Note:** The vendor should be defined as an organization in Verde.	VENDORCODE/ ACQUISITION
Budgets	Text	500	The name of the budget or fund that is paying for the subscription.	BUDGETS/ ACQUISITION
Advanced notification period	Integer	10	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record.	SUBSCRIPTIONNOTIFICATION/ACQUISITION

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Auto renewal	Boolean	1	Indicates whether the renewal is automatic or explicit.	AUTORENEWAL/ ACQUISITION
Renewal/ cancellation note	Text	500	The reason for canceling or renewing the subscription.	RENEWCANCDESCISIONNOTE/ ACQUISITION
Renewal/ cancellation note for ILS	Text	500	Renew cancellation note to send to the ILS.	RENEWCANCNOTEILS /ACQUISITION
Renewal/ cancellation note for vendor	Text	500	Additional information for the vendor, about renewing or canceling the subscription.	RENEWCANCNOTEVENDOR /ACQUISITION
Print cancellation restriction	Boolean	1	Restrictions on canceling print versions of electronic titles covered by a license.	PRINTCANCELRESTRICTION/ACQUISITION
Print cancellation note	Text	500	Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license.	PRINTCANCELNOTE/ ACQUISITION
Purchase order No.	Text	50	The number assigned to the purchase order of a product.	PURCHASEORDERNO/ ACQUISITION
Vendor subscription ID	Text	30	The ID of the vendor subscription.	VENDORSUBSCRIPTIONCODE/ACQUISITION

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Material type	Code	30	The possible values are the following: ■ A/I Database ■ Article Database ■ Database ■ e-Book ■ <null> ■ Journal ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized by modifying the code table.	MATERIALTYPE/ ACQUISITION
Subscription type	Code	30	The possible values are the following: ■ Electronic ■ Electronic & print ■ Electronic & print surcharge ■ Print ■ Print & electronic surcharge ■ Type 1 ■ Type 2 ■ Type 3 If left blank, the Electronic value will be set. These fields can be customized by modifying the code table.	SUBSCRIPTIONTYPE/ ACQUISITION
Subscription type note	Text	500	Subscription type note	SUBSCRIPTIONTYPENOTE/ACQUISITION

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Note for ILS	Text	500	Note for ILS	NOTEFORILS/ ACQUISITION
Note for vendor	Text	500	Note to be included in correspondence with the vendor	NOTEFORVENDOR/ ACQUISITION
Discount on price	Decimal	5 characters: 2 digits and 2 decima	A discount in price or in pricing formula	DISCOUNTONPRICE/ ACQUISITION
Final price	Decimal	16 characters: 13 digits and 2 decima	The amount paid for the product	PRICE/ACQUISITION
Acquisition method	Code	10	Method of acquisition The possible values are the following: ■ Exchange ■ Free ■ Gift ■ Method 1 ■ Method 2 ■ Method 3 ■ Purchase If left blank, the Purchase value will be set. These fields can be customized by modifying the code table.	ACQUISITIONMETHO D/ACQUISITION
Pricing model	Text	30	A description of the fee structure applicable to the product	PRICINGMODEL/ ACQUISITION
Price cap	Decimal	10	The maximum percentage of annual increase in a multi-year agreement	PRICINGCAP/ ACQUISITION

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Price cap period from	Date	7	Dates on which the price cap begins	PRICINGCAPFROM/ ACQUISITION
Price cap period to	Date	7	Dates on which the price cap ends	PRICINGCAPTO/ ACQUISITION
Price note	Text	255	Note field that contains additional information regarding the subscription price	PRICENOTE/ ACQUISITION
Inflation rate	Decimal	10	The inflation rate (defined in percentage terms)	INFLATIONRATE/ ACQUISITION
Consortial agreement	Boolean	1	Indicates whether an acquisition falls under a multiparty agreement that uses the same license for all parties	CONSORTIALAGREEMENT/ACQUISITION
Pooled concurrent users	Integer	10	The number of concurrent users if shared across a consortium rather than within a specific institution. This number may be spread across one or more e-products.	POOLEDCONCURRENTUSERS/ ACQUISITION
Concurrent users note	Text	500	A specific explanation of how users are allocated or shared if pooled or platform-based. Additional information about the number of concurrent users.	CONCURRENTUSERSNOTE/ACQUISITION
List price	Decimal	16 characters: 13 digits and 2 decimal	Publisher's list price	LISTPRICE/ ACQUISITION

Table 60. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Net price	Decimal	16 characters: 13 digits and 2 decimal	Net price of the order	NETPRICE/ ACQUISITION
Currency	Code	10	The acquisition payment currency. The default value is U.S.D. The default can be changed using the Codes section of the Admin module.	CURRENCY/ ACQUISITION
Institution	Text	100	The library that accesses the e-product if the usage is limited to one library. Points to the Organizationcode field in the library and organization tables. **Note:** The institution in the input file should be defined as a library in Verde. Allowed only for acquisitions related to e-print.	INSTITUTECODE/ ACQUISITION
Number of copies	Number	10	Number of copies (related only to e-print). Allowed only for acquisitions related to e-print	NUMBEROFCOPIES/ ACQUISITION

Acquisition Loader Workflow

1. Verde verifies that the acquisition input file is in the correct format and includes mandatory columns:
   - If the format is not correct, the input file is rejected.
   - If the format is correct, Verde progresses to the next stage.
2. Verde examines the value in the Match column for each line of the file.

- If the Match column value is a title, Workexpression code, SFX ID, or e-product code, Verde searches for matching e-products:
  - If no match is found, the line is rejected.
  - If more than one e-product is found, the line is rejected.
  - If only one matching e-product is found, Verde progresses to the next stage.
- If the Match column value is an acquisition code, Verde searches the database for a matching acquisition record.
  - If no match is found, the line is rejected.
  - If a match is found, Verde progresses to the next stage.

3 For new or updated acquisitions, Verde checks whether the acquisition dates are valid (the start and end dates are in the present; the start date is earlier than the end date) and that there is no overlapping between the dates of different acquisitions associated with the same e-product.

- If the dates are not valid or if there is an overlapping, the line is rejected.
- If the dates are valid, Verde progresses to the next stage.

4 If there are local acquisitions within the acquisition, Verde checks that the total cost of the local acquisitions does not exceed the final price of the acquisition.

- If the total cost of local acquisitions exceeds the final price of the acquisition, the line is rejected.
- If the total cost of local acquisitions does not exceed the final price of the acquisition, Verde progresses to the next stage.

5 If there are values in the **Link to e-Products** field, Verde searches for matching e-products for each value.

- If no e-products are found or if multiple matches are found, the line is rejected.
- If there is a single e-product for each value, Verde progresses to the next stage.

6 Verde checks whether there is any overlap between the dates of the given acquisition and the dates of all other acquisitions linked to any of the e-products matching the values in the **Link to e-Products** field.

- If an overlap exists, the line is rejected.
- If no overlap exists, Verde links the acquisition.

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License Input Files

This section includes:

- **About License Input Files** on page **375**
- **License Input File Rules** on page **375**
- **License Input File Fields** on page **377**
- **License Loader Workflow** on page **411**

About License Input Files

Verde's license loader loads the license input file. This input file loads license records, which need to be added to, or updated in, the Verde database. The input file contains columns for the license fields for each record being loaded. A new license record must be associated with a single e-product that should be identified in the **Match** column. An updated license must be identified in the **Match** column with a license code. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The license input file's columns are described in **Table 63**.

License Input File Rules

Before loading your input file, ensure that it follows these rules:

- The input file includes the **Match** column. The **Match** field is mandatory both for new and updated licenses. When an input file does not contain a **Match** column, the file is not loaded to Verde and an error is logged in the summary.
- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields and no default values are defined, the input line is rejected and an error is logged in the output report.

- For new licenses, the matching field is either a bibliographic or Verde identifier used to identify the e-product associated with the license.

  For example, the following sample file creates four new licenses with minimal input information. The e-product for the first license is identified by e-product code, the second e-product by SFX ID, the third by workexpression code, the fourth by title.

Table 61. Four New Licenses

Match	License Method	License Status	License Start Date	License End Date	Licensed Execution Date	Licensor	Licensee
CEP_1123340540996_952680	Manifest assent	In negotiation	10/12/2008	31/12/2008	31/12/2008	OVID	Art Library
111089394066000	Online	Under review	10/12/2008	10/12/2009		ABI	Music Library
CWE_1123334167035_611274	Negotiated	New					
Advanced Multivariate Statistics with Matrices	Click through	New					

- For an updated license, the matching field is a license code used to identify the license to be updated. The following example illustrates how to update a license with perpetual coverage information. The license to be updated is identified by license code.

Table 62. Updating a License with Perpetual Coverage Information

Match	Pepetual Coverage From	Perpetual Coverage To
LIC1187856352455_20	10/12/2007	10/06/2008

- The following fields are mandatory for a new license: **License status**, **License renewal type**, and **License type**. If these values/columns are missing in the input file, default values are assigned to the new license.
- Some fields are mandatory for several license statuses. For a full list of mandatory fields for each license status, see the license dependencies table.
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.

- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file.

License Input File Fields

The following table describes the input file fields of the license loader.

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Match (mandatory)		Work / e-product/ license		For a new license, must be one of the following: ■ title ■ workexpression code ■ Verde e-product code ■ SFX ID of associated e-product (appears in the **Interoperability** tab of the e-product's page) ■ For updated license, it must be: ■ license code **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in a general or number format, Excel does not store any digits past the 15th digit and the data is lost.	MARCXML/ WORKEXPRESSION/ WORKEXPCODE/ WORKEXPRESSION EPRODUCTCODE/ EPRODUCT G_SFXID/ EPRODUCT LICENSECODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Type (mandatory for a new license)	Code	License	30	The type of license. The possible values are: ■ Regular ■ Trial ■ Supplemental ■ Prevailing These fields can be customized by modfying the code table. If left blank, a license of type **Regular** will be created.	TYPECODE/ LICENSE
License name	Text	License	100	The locally assigned name of the license agreement.	LICENSENAME/ LICENSE
License method (mandatory for a new license)	Code	License	30	License method. The possible values are: ■ Click through (it is a default value unless it is set differently under Admin/Default values) ■ Manifest assent ■ Negotiated ■ Online ■ Shrinkwrap These fields can be customized in the code table. If left blank, the default value is saved. For more information about default values, see page 411.	METHODCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
License start date (mandatory for several license statuses)	Date	License	8	The start date of the license.	STARTDATE/ LICENSE
License end date (mandatory for several license statuses)	Date	License	8	The end date of the license.	ENDDATE/LICENSE
Renewal date	Date	License	8	Date of renewal.	RENEWALDATE/ LICENSE
License execution date (mandatory for several license statuses)	Date	License	8	The date on which the license was executed.	EXECUTIONDATE/ LICENSE
Standard duration	Integer	License	10	The period of time covered by the license agreement. Used when licenses are renewed. Can be defined in weeks, months, and years.	LICENSE DURATION/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Standard duration value	Code	License	30	The period of time covered by the license agreement. The possible values are: ■ Weeks (it is a default value unless it is set differently under Admin/ Default values) ■ Months ■ Years. These fields can be customized in the code table. For more information about default values, see page 411.	LICENSE DURATIONVAL/ LICENSE
Vendor advance notice	Integer	License	10	The amount of time before the license expires by which you need to cancel your subscription. This can be expressed in one of the following units: ■ Weeks ■ Months ■ Years. The measurement is defined according to the value of the **Vendor Advance notice** value	VENDOR ADVANCED NOTICE/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Vendor advance notice value	Code	License	30	The measurement used for **Vendor advance notice**. The possible values are: ■ Days (it is a default value unless it is set differently under Admin/Default values) ■ Weeks ■ Months These fields can be customized in the code table. For more information about default values, see page 411.	VENDOR ADVANCED NOTICEVAL/ LICENSE
Renewal type (mandatory for a new license)	Code	License	30	A clause that specifies whether renewal is automatic or explicit. The possible values are: ■ Automatic (it is a default value unless it is set differently under Admin / Default values) ■ Explicit ■ Perpetual These fields can be customized in the code table. If left blank, the default value is saved. For more information about default values, see page 411.	RENEWALTYPE CODE/LICENSE
License URI	Text	License	255	The Uniform Resource Identifier at which the license agreement is made available.	LICENSEURI/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
License URI type	Code	License	30	The type of Uniform Resource Identifier being used to locate the license agreement. The possible values are: ■ Null – field left empty (it is a default value unless it is set differently under Admin / Default values) ■ URI ■ URL ■ URN ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized in the code table. For more information about default values, see page 411.	LICENSEURITYPE/ LICENSE
Physical license location	Text	License	250	The place in which a printed or other tangible instance of the license is stored.	PHYSICAL LOCATION/ LICENSE
Electronic file location	Text	License	250	Contains the file location of the electronic version of the license.	FILELOCATION/ LICENSE
Auto-renewal cancellation period	Integer	License	10	The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription.	NONRENEWAL NOTICEPERIOD/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Auto-renewal cancellation period value	Code	License	30	The time interval in which the **Non-Renewal Notice Period** is measured. The possible values are: ■ Days (default value) ■ Weeks ■ Months These fields can be customized in the code table.	NONRENEWAL NOTICECODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
License status	Code	License	30	The status of the license (mandatory for a new license). Possible values are: ■ New (it is a default value unless it is set differently under Admin /Default values) ■ In negotiation ■ Under review ■ Under local review ■ Pending local response ■ Pending licensor response ■ Awaiting vendor generic license ■ Redacted version created ■ Electronic version created ■ Awaiting local signature ■ Final legal version received ■ Approved ■ Pending final local signature ■ Retired ■ Pending final signature by licensor ■ Approved locally ■ Rejected	STATUSCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
License status (cont.)				If left blank, the default value is saved. These values can be customized in the code table. For more information about default values, see page 411.	
License status note	Text	License	750	Note field that contains additional information regarding the license status.	STATUSNOTE/ LICENSE
Licensor	Text	License	100	The person who, or organization that, granted the license. The party who formulates the terms and conditions of use for the product, with whom the licensee (purchaser) is bound in contract by signing or otherwise assenting to a license agreement. **Note:** The licensor inserted into the input file should be defined as an organization in Verde.	LICENSOR/LICENSE
Original licensor	Text	License	100	The original organization granting the license. **Note:** The original licensor inserted into the input file should be defined as an organization in Verde.	ORIGINAL LICENSOR/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Licensee	Text	License	100	The person to whom the license is granted. The legal party that signs or otherwise assents to the license. **Note:** The licensee inserted into the input file should be defined as a library in Verde.	LICENSEE/LICENSE
Licensing agent	Text	License	100	An organization (such as a subscription agent) or individual that facilitates a licensing transaction on behalf of one or more parties. **Note:** The licensing agent inserted into the input file should be defined as a library contact in Verde.	LICENSINGAGENT/ LICENSE
Local licensing negotiator	Text	License	100	The name of the local person responsible for negotiating the license.	LOCALLICENSE NEGOTIATOR/ LICENSE
Licensee delivery requirements	Text	License	500	The required medium in which official communications must be delivered.	DELIVERY REQUIREMENTS/ LICENSE
Licensing note	Text	License	750	Additional information regarding the license, the negotiation of the license, the product, and so on.	LICENSINGNOTE/ LICENSE
Public note	Text	License	750	Additional information regarding the resource that is intended for public use.	PUBLICNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
License replaced by	Text	License	30	The new license.	REPLACEDBY/ LICENSE
License replaces	Text	License	30	The previous license.	REPLACES/ LICENSE
License history note	Text	License	750	Additional information about accessing the licenses.	LINKEDLICENSE NOTE/LICENSE
General terms note	Text	License	750	Notes about the terms in the business agreement (of the license as a whole).	GENERALTERMS NOTE/LICENSE
User restriction note	Text	License	750	Additional information about other user restrictions not adequately described elsewhere. For example, restrictions on users located outside the United States or the country in which the institution is located.	USER RESTRICTIONS NOTE/LICENSE
Use restriction note	Text	License	750	Indicates whether to use a restriction note.	USE RESTRICTIONS NOTE/LICENSE
Authorized user definition	Text	License	750	The group of users allowed to use the Electronic Product, as defined in the contract.	AUTHORIZESUSER DEF/LICENSE
Local authorized user definition	Boolean	License	1	The inclusion of an institution-specific preferred authorized user definition.	LOCALSUTHORIZES USERDEF/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
ILL print or fax	Code	License	30	The right to provide the licensed materials via interlibrary loan by way of printed copies or facsimile transmissions. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	INTRLIBPRINTOR FAXCODE/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
ILL secure electronic transmission	Code	License	30	The right to provide the licensed materials via interlibrary loan by way of secure electronic transmissions. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	INTRLIBSECURE TRANSCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
ILL electronic	Code	License	30	The right to provide the licensed materials via interlibrary loan by way of electronic copies. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	INTRLIB ELECTRONIC CODE/LICENSE
ILL record keeping required	Boolean	License	1	The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request.	INTRLIBKEEPING REQUIREDCODE/ LICENSE
ILL term note	Text	License	750	Additional information related to interlibrary loans.	INTRLIBTERM NOTE/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Fair use clause indicator	Boolean	License	1	A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section 107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law.	FAIRUSECLAUSE CODE/LICENSE
All rights reserved indicator	Boolean	License	1	A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor.	ALLRIGHTS RESERVEDCODE/ LICENSE
Data protection override	Boolean	License	1	A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law.	DBPROTECTION OVERRIDECODE/ LICENSE
Citation requirement detail	Text	License	255	A specification of the required or recommended form of citation.	CITATION REQUIREMENT DETAILS/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Digital copy	Code	License	30	The right of the licensee and authorized users to download and digitally copy a reasonable portion of the licensed materials. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	DIGITALCOPY CODE/LICENSE
Digital copy term note	Text	License	750	Information that qualifies a permissions statement on a digital copy.	DIGITALCOPY TERMNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Print copy	Code	License	255	The right of the licensee and authorized users to print a portion of the licensed materials. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	PRINTCOPY/ LICENSE
Print copy term note	Text	License	750	Information that qualifies a permissions statement on print copy.	PRINTCOPY TERMNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Scholarly sharing	Code	License	255	The right of authorized users and/or the licensee to transmit a hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific, or professional use. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	SCHOLARY SHARING/LICENSE
Scholarly sharing term note	Text	License	750	Information that qualifies a permissions statement on Scholarly Sharing.	SCHOLARY SHARINGNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Distance education	Code	License	255	The right to use licensed materials in distance education. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	DISTANCE EDUCATION/ LICENSE
Distance education term note	Text	License	750	Information that qualifies a permissions statement on distance education.	DISTANCE EDUCATIONTERM NOTE/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Course reserve print	Code	License	30	The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	COURSERESERVE PRINTCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Course reserve electronic/ cached	Code	License	30	The right to make electronic copies of the licensed materials and store them on a secure network. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	COURSERESERVE ELCORCASHCODE/ LICENSE
Course reserve term note	Text	License	750	Information that qualifies a permissions statement on course reserves.	COURSERESERVE TERMNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Electronic link	Code	License	30	The right to access the licensed material. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	ELECTRONICLINK CODE/LICENSE
Electronic link term note	Text	License	750	Information that qualifies a permissions statement on electronic links.	ELECTRONICLINK TERMNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Course pack print	Code	License	30	The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction. The possible values are: ■ Null – Field left blank (default value) ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	COURSEPACK PRINTCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Course pack electronic	Code	License	30	The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	COURSEPACK ELECTRONIC CODE/LICENSE
Course pack term note	Text	License	750	Information that qualifies a permissions statement on Course Packs.	COURSEPACKTERM NOTE/LICENSE
Remote access	Text	License	3	The right of an authorized user to gain access to an Electronic Product from an offsite location. Possible values are **yes** and **no**.	REMOTEACCESS CODE/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Walk-in term use note	Text	License	750	Information that qualifies the status or permitted actions of Walk-In Users.	WORKINTERMUSE NOTE/LICENSE
Perpetual access rights	Code	License	30	The right to permanently access the licensed materials paid for during the period of the license agreement. The possible values are: ■ Null – Field left blank (default value) ■ No ■ Undetermined ■ Yes ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	PERPETUAL ACCESSRIGHTS/ LICENSE
Perpetual coverage from	Date	License	8	The date from which there is perpetual access.	PERPETUAL ACCESSFROM/ LICENSE
Perpetual coverage to	Date	License	8	The date until which there is perpetual access.	PERPETUAL ACCESSTO/ LICENSE
Perpetual coverage note	Text	License	750	Note about perpetual holdings.	PERPETUAL HOLDINGSNOTE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Archiving rights	Code	License	30	The right to permanently retain an electronic copy of the licensed materials. The possible values are: ■ Null – Field left blank (default value) ■ No ■ Undetermined ■ Yes ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	ARCHIVING RIGHTSCODE/ LICENSE
Archiving format	Code	License	30	The format of the archival content. The possible values are: ■ Null – Field left blank (default value) ■ CDROM ■ Remote ■ Tape ■ Unspecified tangible format ■ Format 1 ■ Format 2 ■ Format 3 These values can be customized in the code table.	ARCHIVING FORMATCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Archiving note	Text	License	750	Additional information related to archiving rights, product, and format.	ARCHIVINGNOTE/ LICENSE
Accessibility compliance	Boolean	License	1	An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation.	ACCESSABILITY COMPLIANCE/ LICENSE
Completeness of content clause	Text	License	30	The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the equivalent print version. Possible values are: **Present**, **Absent**.	COMPLETENESSOF CONTENTCODE/ LICENSE
Concurrency with print version	Text	License	30	The presence of a provision in the contract stating that the licensed materials are available before, or no later than the equivalent print version, and/or are kept current. Possible values are: **Present**, **Absent**.	CONCURRENCY WITHPRINTCODE/ LICENSE
Intellectual property warranty	Boolean	License	1	A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties.	INTELLECTUAL PROPWARRENTY/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
User information confidentiality	Boolean	License	1	The requirement that user data should not be shared with third parties, reused, or resold without permission.	CONFIDENTIALITY OFUSER/LICENSE
UCITA override clause indicator	Boolean	License	1	A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state.	UCITAOVERRIDE/ LICENSE
Clickwrap modification	Boolean	License	1	A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement; or terms of use residing on the provider's server that might otherwise function as a contract of adhesion.	CLICKWRAP MODIFICATION/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Indemnification by licensor	Code	License	30	A clause by which the licensor agrees to indemnify the licensee against a legal claim. The possible values are: ■ Null – Field left blank (default value) ■ General ■ Intellectual property only ■ Other These values can be customized in the code table.	INDEMNIFICATION CODE/LICENSE
Indemnification by licensor indicator	Boolean	License	1	A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee.	INDEMNIFICATION/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Confidentiality of agreement	Code	License	255	The presence or absence of clauses that specify or detail restrictions on the sharing of the terms of the license agreement. The possible values are: ■ Null – Field left blank (default value) ■ All ■ All but user terms ■ Financial only ■ No These values can be customized in the code table.	CONFDTYOF AGREEMENT/ LICENSE
Confidentiality note	Text	License	750	Specific details about what aspects of the license are private.	CONFDTYOF AGREEMENTNOTE/ LICENSE
Governing law	Text	License	255	A clause specifying the governing law to be used in the event of an alleged breach of the agreement.	GOVERNINGLAW/ LICENSE
Governing jurisdiction	Text	License	255	The venue or jurisdiction to be used in the event of an alleged breach of the agreement.	GOVERNING JURISDICTION/ LICENSE
Applicable copyright law	Text	License	255	A clause that specifies the national copyright law agreed to in the contract.	APPLICABLE COPYRIGHTLAW/ LICENSE
Cure period for breach	Integer	License	10	The cure period for an alleged material breach.	CUREPERIODFOR BREACH/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Cure period for breach value	Code	License	30	The time interval that measures the **Cure Period for Breach**. The possible values are: ■ Days (default value) ■ Weeks ■ Months These fields can be customized in the code table.	CUREPERIODFOR BREACHUOM CODE/LICENSE
Content warranty	Text	License	750	A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the resource is materially diminished.	CONTENT WARRENTY/ LICENSE
Performance warranty	Boolean	License	1	Indicates whether a clause that requires a satisfactory level of online availability and/ or response time is present.	PERFORMANCE WARRENTYIND/ LICENSE
Uptime guarantee	Text	License	750	Uptime guarantee notes	PERFORMANCE WARRENTY/ LICENSE
Maintenance window	Text	License	750	The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.	MAINTENANCE WINDOW/LICENSE
Licensee termination rights	Boolean	License	1	The ability of the licensee to terminate an acquisition during a contract period.	LICENSEE TERMINATION RIGHTS/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Licensee termination condition	Code	License	30	The condition under which the licensee terminated an acquisition during a contract period. The possible values are: ■ Null – Field left blank (default value) ■ At will ■ Breach by licensor ■ Other ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	LICENSEE NOTICEPERIODOF TRMNCODE/ LICENSE
Licensee termination notice period	Integer	License	10	The time interval in which the **Licensee Notice Period for Termination** by the library is measured.	LICENSEE NOTICEPERIODOF TRMN/LICENSE
Licensee termination notice period value	Code	License	30	The amount of advance notice required prior to contract termination by the licensee. The possible values are: ■ Days (default value) ■ Weeks ■ Months These fields can be customized in the code table.	LICENSEETRMN CONDITIONCODE/ LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Licensor termination rights	Boolean	License	1	The ability of a Licensor to terminate an acquisition during a contract period.	LICENSOR TERMINATION RIGHTS/LICENSE
Licensor termination condition	Code	License	30	The conditions under which the licensor terminated an acquisition during a contract period. Possible values are: ■ Null – Field left blank (default value) ■ At will ■ Breach by licensee ■ Other ■ Type 1 ■ Type 2 ■ Type 3 These values can be customized in the code table.	LICENSOR TRMCONDITION/ LICENSE
Licensor termination notice period	Integer	License	10	The amount of advance notice required prior to contract termination by the licensor.	LICENSOR NOTICEPERIOD TRM/LICENSE

Table 63. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Oracle Field/ Oracle Table
Licensor termination notice period value	Code	License	30	The time interval in which the licensor notice period for termination is measured. The possible values are: ■ Days (default value) ■ Weeks ■ Months These fields can be customized in the code	LICENSOR NOTICEPERIOD TRMCODE/LICENSE
Termination right note	Text	License	750	Additional information necessary for specifications of termination rights.	TRMRIGHTNOTE/ LICENSE
Termination requirement note	Text	License	750	A clarification of the termination requirements and what certification of the requirement activities is necessary.	TRM REQUIREMENT NOTE/LICENSE
Attachment full path	Text	License	255	Full path of license attachment on the server. For loading multiple license attachments, insert paths separated by semicolons (;) Make sure that the full path can be reached from the Verde server. To delete a license attachment, set the value to <NULL>.	FULLPATH/ LICENSE ATTACHMENT

License Loader Workflow

After Verde verifies that the license input file is in the correct format and includes mandatory columns, Verde examines the value in the **Match** column.

- If the **Match** column value is a title, workexpression code, SFX ID, or e-product code, Verde searches for a related e-product.
  - If no match is found, the line is rejected.
  - If Verde retrieves matches for more than one e-product, the line is rejected.
  - If only one related e-product is found, Verde verifies that values exist for the mandatory fields. If the input file includes mandatory fields, the program progresses to the next stage. If a field is blank or a column is removed from the input file, the default value is saved in the database. The default values are taken from two areas:
    - The program first checks the default values defined in the Task Properties screen. If these values are defined, they are saved in the database.
    - If values are not defined in the Task Properties screen, Verde checks whether the license parameters defined in **Admin > Default Values** are saved in the database. For more information, see **The Default Values Tab** on page **527**.

NOTE:
The input file value always overwrites a default value.

- If the **Match** column value is the license code, Verde searches for an updated license. If no match is found, the line is rejected. If a match found, the program goes to the next stage.
- For new and updated licenses, Verde performs a dependency check. Some license fields may be mandatory, depending on license status. For details, see the following table.

Table 64. Mandatory Fields for License Statuses

License Status	Mandatory Fields
New	
Approved	License start date, License end date, License execution date, Vendor advance notice, Licensor, Licensee
Retired	License start date, License execution date, Vendor advance notice, Licensor, Licensee

Table 64. Mandatory Fields for License Statuses

License Status	Mandatory Fields
Active or Inactive (for prevailing license only)	License start date, License end date
Other statuses	Licensor, Licensee

- For an updated license, Verde updates the license, with the following exceptions:
  - Licenses with **Approved** and **Retired** statuses cannot be updated.
  - You cannot change the license type from **Prevailing** to another type and vice versa.
  - A **Prevailing** license type can be created only if the associated e-product already has more than one active license (license with **Approved** status).

NOTE:
For records being updated, default values are not taken into account.

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Library, Library Contact, and Library IP Input Files

This section includes:

- **Library Input File Rules** on page **413**
- **Library Input File Fields** on page **415**
- **Library Loader Workflow** on page **418**
- **Library Contact Input Files** on page **419**
- **Library Contact Input File Fields** on page **419**
- **Library Contact Loader Workflow** on page **422**
- **Library IP Input Files** on page **422**
- **Library IP Input File Fields** on page **423**

About Library Input Files

Verde's library loader loads the library input file. This input file loads library records that need to be added to, or updated in, the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The library input file's columns are described in **Table 67**.

Library Input File Rules

Before loading your input file, ensure that the file follows these rules:

- The input file includes mandatory columns. When an input file does not contain all mandatory columns, the input file is not loaded to Verde and an error is logged in the summary.

- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields, the input line is rejected and an error is logged in the output report.
- For new records, the following fields are mandatory:
  - **Library code**
  - **Library name**

  For example, the following sample file creates two new libraries with minimal input information:

Table 65. Two New Libraries

Library Code	Library Name
555	Art Library
456	Music Library

- For updated records, the **Library code** is a mandatory field (so that the library can be identified for update).

  The following example illustrates how to update a library record with default library access information:

Table 66. Update Library Record with Default Library Access Information

Library Code	Library Name	Default Library Access
555	Art Library	1
456	Music Library	0

After loading, the default library access will be updated to **Include** for **Art Library** and **Exclude** for **Music Library**.

- The input file columns can be rearranged and columns can be removed from the input file. The text of the column's header cannot be modified.
- The columns in the input file may contain any of the fields available for library, IP range, or contact records.
- For new records, when a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.

NOTE:
"Related institute" is not loaded. The value may only be added manually in a special consortial setup. For details, see **Configuring Institutes** on page **572**.

Library Input File Fields

The following table describes the input file fields for the library loader.

Table 67. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Library code (mandatory)	Text	30	The library code. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	ORGANIZATIONCODE/ LIBRARY
Library name (mandatory)	Text	100	The display name of the library.	NAME/ ORGANIZATIONNAME/ where TYPE=MAIN
Alternate name<#>	Text	100	An alternate name used for the library. The library can have up to three different alternate names.	NAME/ ORGANIZATIONNAME/ where TYPE=ALTERNATE
Default library access	Boolean	1	Indicates whether by default resources are active or inactive for this library. The default values are 0 or 1 where: ■ 0=Exclude ■ 1=Include If left blank, the default **Include** value is saved.	DEFAULTBEHAVIOR INCLUDE/LIBRARY
Instance abbreviation	VarChar	10	The instance's abbreviated title.	INSTANCE ABBREVIATION/ LIBRARY

Table 67. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Guest member	Boolean	1	Relevant only for consortia. Indicates whether the library's resources are managed by the center without the library having its own Verde instances. Values are **0** or **1** where **0** is **No** and **1** is **Yes**. The default is **No**.	
Related instance	VarChar	30	Relevant only for consortia. Maps the library to a certain Verde instance. This is used only in a multi-shared instance system.	RELATEDINSTANCE/ LIBRARY
Street	Text	100	The street name in the library's address.	STREETNAME/LIBRARY
City	Text	50	The city in which the library is located.	CITY/LIBRARY
State/Province	Text	50	The state or province in which the library is located.	PROVINCE/LIBRARY
Country	Text	50	The country in which the library is located.	COUNTRY/LIBRARY
Postal code	Text	15	The zip code in the library's address.	ZIPCODE/LIBRARY
SFX institute code	Text	30	The institute code used to identify the library in SFX.	SFXINSTITUTECODE/ LIBRARY
Role note	Text	255	Additional information regarding the library role.	ROLENOTE/LIBRARY
Full time employees	Integer	10	The number of full time employees on staff at the library.	FULLTIMEEMPLOYEES/ LIBRARY

Table 67. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Faculty	Integer	10	The number of full time faculty members at the library.	FACULTY/LIBRARY
Graduate students	Integer	10	The number of graduate students that belong to the library.	GRADUATESTUDENTS/ LIBRARY
Undergraduate students	Integer	10	The number of undergraduate students that belong to the library.	UNDERGRADUATE STUDENTS/LIBRARY
Note	Text	500	Note about library's IP ranges.	IPRANGESNOTE/ LIBRARY
Proxy server use flag	Code	30	Indicates the use of a proxy server. The possible values are: ■ Null – Field left blank ■ IP Selective – Indicates IP selective ■ No – Indicates that a proxy server is not used ■ Selective – Indicates selective use of the proxy server ■ Yes – Indicates the use of a proxy server	PROXYSERVERUSE FLAG/LIBRARY

Table 67. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Proxy server type	Code	30	The type of proxy server used (when the Proxy server use flag field is not null). The possible values are: ■ Null – Field left blank ■ EZ proxy – Indicates the EZ proxy being used ■ Library proxy – Indicates the library proxy being used ■ Other – Indicates another proxy type is used ■ SQUID – Indicates SQUID is being used ■ WAM – Indicates WAM is being used	PROXYSERVERTYPE/ LIBRARY
Proxy prepend string	VarChar	250	A string to add to the URL going to the proxy server.	PROXYPREPEND STRING/LIBRARY
Proxy server note	Text	500	Additional information regarding the library's proxy server.	NOTE/LIBRARY

Library Loader Workflow

After Verde verifies that the library input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the **Library code** field. If the library is found, Verde updates the library record. If no library record is found, Verde creates a new library record, provided all the mandatory information for creating a new library record is supplied in the input file.

When a library code is added or updated more than once in an input file, the values specified in the last update are saved in the database.

Library Contact Input Files

Verde's library contact loader loads the library contact input file. This input file contains a list of library contact records for an existing library that need to be added to, or updated in, the Verde database.

The input file contains columns for the fields in the Verde database and rows for each record being loaded.

Since library contacts are associated with a specific library, ensure that the library record exists in the Verde database before you load library contacts for the library. The library contact input file's columns are described in **Table 68**. The library contact input file has the same rules as the library input file. For a description of these rules, see **Library Input File Rules** on page **413**.

Library Contact Input File Fields

The following table describes the input file fields for the library contact loader.

Table 68. Library Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Library code (mandatory)	Text	30	The code of the library in Verde with which the library contact record is associated. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	ORGANIZATION CODE/LIBRARY
Contact name (mandatory)	Text	30	The library contact's name.	NAME/ ORGANIZATION CONTACT
Job title	Text	30	The library contact's job title.	TITLE/ ORGANIZATION CONTACT
Email (mandatory)	Text	30	The library contact's e-mail address.	EMAIL/ ORGANIZATION CONTACT
Phone No.	Text	30	The library contact's phone number.	PHONENUMBER/ ORGANIZATION CONTACT

Table 68. Library Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Alternate phone No.	Text	30	The library contact's secondary phone number.	ALTERNATE PHONENUMBER/ ORGANIZATION CONTACT
Fax No.	Text	30	The library contact's fax number.	FAXNUMBER/ ORGANIZATION CONTACT
Street	Text	100	The name of the street in the library contact's address.	STREETNAME/ ORGANIZATION CONTACT
City	Text	50	The city in the library contact's address.	CITY/ ORGANIZATION CONTACT
State/Province	Text	50	The province in the library contact's address.	PROVINCE/ ORGANIZATION CONTACT
Country	Text	50	The country in the library contact's address.	COUNTRY/ ORGANIZATION CONTACT
Postal code	Text	15	The zip code in the library contact's address.	ZIPCODE/ ORGANIZATION CONTACT
Main contact	Boolean	1	The library's main contact. There are two possible values: **1 (Yes)** or **0 (No)**. If left blank, the default value, **0**, is saved. Note that only one contact per library can be defined as the main contact.	ISDEFAULT/ ORGANIZATION CONTACT

Table 68. Library Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Contact role	Code	30	The role of the library contact. The possible values are: ■ Other ■ ILS Acquisitions ■ ILS Cataloging ■ e-Product sponsor ■ Selector ■ Donor ■ e-Product ACQ contact ■ e-Product License contact ■ e-Product Access contact ■ Purchase Partner contact These fields can be customized by changing the value in the code table (select **Topic > Organization > Field > Contact Role**). The list contains library contact and organization contact roles. Note that the values of library contact roles begin with **INT** (meaning internal). Multiple roles can be entered, separated by a semicolon. If left blank or set to **<NULL>**, the system assigns a default role of **Other** for the new library contact. If the input file includes a new role for the updated library contact, the new library contact role is added to the list of already existing roles.	ROLE/ ORGANIZATION CONTACT

Library Contact Loader Workflow

After Verde performs a general validation of the library contact input file, the workflow below is followed:

- When creating a new contact, the contacts are added without searching for a matching contact.
- When updating existing contacts, the contact being added is compared with contacts that exist in the database. If a match is found for the normalized contact name, library code, and e-mail, the contact record is updated. Otherwise, the contact record is added as a new contact.

When a new contact is created, a normalized version of the contact name is used for the matching field. The spaces are removed from the name and the letters are all changed to uppercase. The contact name cannot be edited with the loader.

Library IP Input Files

Verde's library IP loader loads the library IP input file. This input file contains a list of IP range records for an existing library that need to be added to, or removed from, the Verde database. The library IP loader cannot update records in the database.

The input file contains columns for the fields in the Verde database and rows for each record being loaded. The library IP input file's columns are described in **Table 69**.

Since IP ranges are associated with a specific library, ensure that the library record exists in the Verde database before you load IP ranges for the library.

The library IP input file has the same rules as the library input file. For a description of these rules, see **Library Input File Rules** on page **413**.

Library IP Input File Fields

The following table describes the input file fields for the library IP loader.

Table 69. Library IP Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Library code (mandatory)	Text	30	The code of the library in Verde with which the IP range records are associated. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	ORGANIZATIONCODE/ LIBRARYIPRANGE
From (mandatory)	Text	15	The start of the IP address range for the organization.	IPRANGEFROM/ LIBRARYIPRANGE
To	Text	15	The end of the IP address range for the organization.	IPRANGETO/ LIBRARYIPRANGE
Exclude	Boolean	1	Indicates whether this IP is excluded from the range. If this field is left blank, the default **No (Include)** value is saved. The possible values are **0** (**Yes**) or **1** (**No**).	ISEXCLUDE/ LIBRARYIPRANGE
Internal/Vendor	Boolean	1	Indicates whether the IP is internal or external. Values are **0** or **1**, where **0** is **Vendor** and **1** is **Internal**. If this field is left blank, the default value **Internal** is saved.	ISINTERNAL/ LIBRARYIPRANGE

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Organization and Organization Contact Input Files

This section includes:

- **About Organization Input Files** on page **425**
- **Organization Input File Rules** on page **425**
- **Organization Input File Fields** on page **427**
- **Organization Loader Workflow** on page **429**
- **Organization Contact Input Files** on page **429**
- **Organization Contact Input File Fields** on page **430**
- **Organization Contact Loader Workflow** on page **432**

About Organization Input Files

Verde's organization loader loads the organization input file. This input file loads organization records that need to be added to, or updated in, the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The organization input file's columns are described in **Table 72**.

Organization Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- The input file includes mandatory columns. When an input file does not contain all mandatory columns, the input file is not loaded to Verde and an error is logged in the summary.

- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields, the input line is rejected and an error is logged in the output report.
- For new records, the following fields are mandatory:
  - **Organization code**
  - **Organization name**

  For example, the following sample input file creates two new organization records:

Table 70. Two New Organization Records

Organization Code	Organization Name
111	Organization 1
222	Organization 2

- For updated records, the **Organization code** is a mandatory field (identifies the organization to be updated).

  For example, the following sample input file updates two previously created organizations with alternate names:

Table 71. Updating Organizations with Alternate Names

Organization Code	Organization Name
111	First
222	Second

- The input file columns can be rearranged and columns can be removed from the input file. The text of the column's header cannot be modified.
- For new records, when a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.
- An organization code can include only the following characters: a-z, A-Z, 1-10, _ (underscore). If an organization code value in the input file includes other characters, the code will be converted by Verde. The original code will be saved as an external code. The converted code will be saved as an organization code.

Organization Input File Fields

The following table describes the input file fields for the organization loader.

Table 72. Organization Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Organization code (mandatory)	Text	30	The organization code. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	ORGANIZATIONCODE/ ORGANIZATION
Organization Name (mandatory for new records)	Text	100	An alternate name used for the organization. The organization can have up to three different alternate names.	NAME/ ORGANIZATIONNAME where TYPE=MAIN
Alternate name <number>	Text	100	An alternate name used for the organization.	NAME/ ORGANIZATIONNAME where TYPE=ALTERNATE
Active	Boolean	1	Indicates whether an organization is active or inactive. The possible values are **0** or **1**, where: ■ 1= Active ■ 0= Inactive If this field is left blank, the **Active** default value is saved for the new organization.	ACTIVE/ ORGANIZATION
Street	Text	100	The street name in the organization's address.	STREETNAME/ ORGANIZATION
City	Text	50	The city in which the organization is located.	CITY/ORGANIZATION
State/Province	Text	50	The state or province in which the organization is located.	PROVINCE/ ORGANIZATION

Table 72. Organization Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Country	Text	50	The country in which the organization is located.	COUNTRY/ ORGANIZATION
Postal code	Text	15	The zip code in the organization’s address.	ZIPCODE/ ORGANIZATION
Organization role	Code	30	The role of the organization. The possible values are: ■ Consortial member ■ Consortium ■ Interface provider ■ Licensing agent ■ Licensor ■ Vendor These fields can be customized in the code table. Multiple roles can be entered, separated by a semicolon. If this field is left blank or set to **<NULL>**, the system assigns a default role of **Vendor** for the new organization. If the input file includes a new role for the updated organization, a new organization role will be added to the list of already existing roles.	ROLECODE/ ORGANIZATIONROLE
Role note	Text	255	Organization role notes	ROLENOTE/ ORGANIZATION
General Note	Text	750	General note about the organization	GENERALNOTE/ ORGANIZATION

Table 72. Organization Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Customer Id	Text	750	Customer ID or account number provided by the organization	CUSTOMERID/ ORGANIZATION

Organization Loader Workflow

After Verde verifies that the organization input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the **Organization code** field. If the organization is found, Verde updates the organization record. If no organization record is found, Verde creates a new organization record, provided the input file contains all the information needed for creating a new organization.

When an organization code is added or updated more than once in an input file, the values specified in the last update are saved in the database.

Organization Contact Input Files

Verde's organization contact loader loads the organization contact input file. This input file contains a list of organization contact records for an existing organization that need to be added to, or updated in, the Verde database.

The input file contains columns for the fields in the Verde database and rows for each record being loaded.

Since organization contacts are associated with a specific organization, ensure that the organization record exists in the Verde database before you load organization contacts for the organization. The organization contact input file's columns are described in **Table 73**. The organization contact input file follows the same rules as the organization input file. For a description of these rules, see **Organization Input File Rules** on page **425**.

Organization Contact Input File Fields

The following table describes the input file fields for the organization contact loader.

Table 73. Organization Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Organization code (mandatory field)	Text	30	The Verde code of the organization with which the organization contact record is associated. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	ORGANIZATION CODE/ ORGANIZATION
Contact name (mandatory field)	Text	30	The organization contact's name.	NAME/ ORGANIZATION CONTACT
Job title	Text	30	The organization contact's job title.	TITLE/ ORGANIZATION CONTACT
Email (mandatory field)	Text	30	The organization contact's e-mail address.	EMAIL/ ORGANIZATION CONTACT
Phone No.	Text	30	The organization contact's phone number.	PHONENUMBER/ ORGANIZATION CONTACT
Alternate phone No.	Text	30	The organization contact's secondary phone number.	ALTERNATEPHONE NUMBER/ ORGANIZATION CONTACT
Fax No.	Text	30	The organization contact's fax number.	FAXNUMBER/ ORGANIZATION CONTACT
Street	Text	100	The name of the street in the organization contact's address.	STREETNAME/ ORGANIZATION CONTACT
City	Text	50	The city in the organization contact's address.	CITY/ ORGANIZATION CONTACT

Table 73. Organization Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
State/Province	Text	50	The province in the organization contact's address.	PROVINCE/ ORGANIZATION CONTACT
Country	Text	50	The country in the organization contact's address.	COUNTRY/ ORGANIZATION CONTACT
Postal code	Text	15	The zip code in the organization contact's address.	ZIPCODE/ ORGANIZATION CONTACT
Main contact	Boolean	1	The organization's main contact. There are two possible values: **1 (Yes)** or **0 (No)**. If this field is left blank, the default value, **0**, is saved. Note that only one contact per organization can be defined as the main contact.	ISDEFAULT/ ORGANIZATION CONTACT

Table 73. Organization Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Contact role	Code	30	The role of the organization contact. The possible values are: ■ Other ■ Technical support ■ Account manager ■ Sales representative ■ License contact ■ Trial contact ■ Consortial contact These fields can be customized in the code table. Multiple roles can be entered, separated by a semicolon. If this field is left blank or set to **<NULL>**, the system assigns a default role of **Other** for the new organization contact. If the input file includes a new role for the updated organization contact, the new contact role is added to the list of already existing roles.	ROLE/ ORGANIZATION CONTACT
Contact role note	Text	255	Additional information about the organization contact role.	ROLENOTE/ ORGANIZATION CONTACT

Organization Contact Loader Workflow

After Verde performs a general validation of the organization contact input file, the workflow below is followed:

- When creating a new contact, the contact will be added without searching for a matching contact.

- When updating existing contacts, the contact being added is compared with contacts existing in the database. If a match is found on the normalized contact name, organization code, and e-mail, the contact record is updated. Otherwise, the contact record is added as a new contact.

When a new contact is created, a normalized version of the contact name is used for the matching field. The spaces are removed from the name and the letters are all changed to uppercase. The contact name cannot be edited with the loader.

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Admin and Local Admin Input Files

This section includes:

- About Admin Input Files on page 435
- Admin Input File Rules on page 435
- Admin Input File Fields on page 437
- Admin Loader Workflow on page 443
- About Local Admin Input Files on page 444
- Local Admin Input File Rules on page 444
- Local Admin Input File Fields on page 445
- Local Admin Loader Workflow on page 446

About Admin Input Files

Verde's admin loader loads the admin input file. This input file loads admin records that must be added to the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The admin input file's columns are described in Table 75.

Admin Input File Rules

Before loading your input file, ensure that the file follows these rules:

- The input file includes the mandatory **Match** column. When an input file does not contain the mandatory column, it is not loaded to Verde and an error is logged in the summary.
- The **Match** column contains values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.

- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field or a default value is supplied. There are two fields in the admin record that have default values:

Table 74. Admin Record Fields with Default Values

Fields	Default Value
Statistics standard compliance	Counter
Usage statistics frequency	Annual

Admin Input File Fields

The following table describes the input file fields for the admin loader.

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Match (mandatory field)			Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product (appears in the **Interoperability** tab of the e-product's page) **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	EPRODUCTCODE/ EPRODUCTG_SFXID/ EPRODUCT
Online admin module available	Boolean	1	Denotes whether resource attributes can be directly modified online by the subscribing institution.	ONLINEADMIN/ EPRODUCTADMIN
Admin URI	Text	500	The URI of the online administration module. You can insert the value only if the **Online admin module available** value is positive (defined as **1**, **Yes** or **True**).	ONLINEADMINURI/ EPRODUCTADMIN

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Session timeout	Boolean	1	Indicates whether there is a configurable inactivity timeout.	SESSIONTIMEOUT/ EPRODUCTADMIN
Session timeout value	Integer	3	The inactivity timeout used for the resource. You can insert the value only if the **Session timeout** value is positive (defined as **1**, **Yes** or **True**).	SESSIONTIMEOUT VALUE/ EPRODUCTADMIN
Logout URI	Boolean	1	Indicates whether a logout URI can be specified.	LOGOUTURI/ EPRODUCTADMIN
Logout URI value	Text	500	The logout URI used with the resource. You can insert the value only if the **Logout URI** value is positive (defined as **1**, **Yes** or **True**).	LOGOUTURIVALUE/ EPRODUCTADMIN
User e-Interface configuration	Boolean	1	Indicates the ability to control user interface features.	UICONFIGURATION/ EPRODUCTADMIN
Subscriber branding available	Boolean	1	Indicates whether a branding feature is available.	SUBSCRIBER BRANDING/ EPRODUCTADMIN
Subscriber branding activated	Boolean	1	Indicates whether branding has been activated.	SUBSCRIBER BRANDINGACTIV STATUS/ EPRODUCTADMIN
Subscriber branding note	Text	500	Subscriber branding note.	SUBSCRIBER BRANDINGNOTE/ EPRODUCTADMIN
Personalization services available	Boolean	1	Indicates whether alerting and other personalization features are available.	PERSONALIZATION SERVICES/ EPRODUCTADMIN
Z39.50 supported	Boolean	1	Indicates the ability of the resource's interface to support z39.50.	Z3950/ EPRODUCTADMIN

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Hook to holdings	Boolean	1	Indicates the availability of a link to library holdings.	HOOKTOHOLDINGS/ EPRODUCTADMIN
Holdings activated	Boolean	1	The activation of a link to library holdings.	HOLDINGSACTIVATED/ EPRODUCTADMIN
Provider reference linking available	Boolean	1	The availability of links to external content created by the provider of the resource.	PROVIDERREFERENCE LINKING/ EPRODUCTADMIN
Inbound linking indicator	Boolean	1	The availability of a link to internal, stable locations within a product.	INBOUNDLINKING INDICATOR/ EPRODUCTADMIN
Inbound linking activation status	Boolean	1	Indicates the activation of a link to internal, stable locations within a product.	INBOUNDLINKING ACTIVATIONSTATUS/ EPRODUCTADMIN
OpenURL compliant	Boolean	1	The ability for the electronic product and its content to be Open URL compliant.	OPENURLCOMPLIANT/ EPRODUCTADMIN
OpenURL activation status	Boolean	1	The activation of external links.	OPENURLACTIVATION STATUS/ EPRODUCTADMIN
Linking note	Text	500	Information about external linking—for example, implementation details or other notes.	LINKINGNOTE/ EPRODUCTADMIN
MARC record availability	Boolean	1	The availability of MARC records for the resource.	MARCRECORD AVAILABILITY/ EPRODUCTADMIN
MARC record note	Text	500	Further information regarding the availability of MARC record sets—for example, free or purchased, acquisition and implementation status, and so forth	MARCRECORDNOTE/ EPRODUCTADMIN

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Interface languages availability	Boolean	1	The availability of multiple languages for the interface.	INTERFACE LANGUAGES AVAILABILITY/ EPRODUCTADMIN
Interface languages implemented	Text	9	The activation of one or more interface languages. Multiple languages (up to three) can be entered, separated by a semicolon. The size of each language value is limited to three characters.	INTERFACE LANGUAGES IMPLEMENTED1/2/3/ EPRODUCTADMIN
Usage statistics available	Boolean	1	The availability of usage statistics for the resource.	AVAILABLE/ EPRODUCTADMIN
Statistics standard compliance	Code	100	The official standard to which the statistics conform. The possible values are: ■ Counter ■ ICOLC 1998 These fields can be customized in the code table.	STATISTICSSTANDARD COMPLIANCE/ EPRODUCTADMIN
Usage statistics delivery method	Text	250	The manner in which statistics are made available.	DELIVERYMETHOD/ EPRODUCTADMIN

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Usage statistics format	Text	35	The formats in which statistics are made available. Multiple formats can be entered, separated by a semicolon. The possible values are: ■ HTML ■ Delimited ■ Excel ■ PDF ■ CSV ■ ASCII ■ Other	FORMATHTML FORMATDELIMITED FORMATEXCEL FORMATPDF FORMATCVS FORMATASCII FORMATOTHER/ EPRODUCTADMIN
Usage statistics frequency	Code	20	The frequency with which statistics are made available. The possible values are: ■ Annual ■ Bi-annual ■ Monthly ■ Quarterly ■ User-selectable These fields can be customized in the code table.	FREQUENCY/ EPRODUCTADMIN
Usage statistics online location	Text	500	The online location at which statistics can be accessed, such as a URL or file path.	ONLINELOCATION/ EPRODUCTADMIN
Usage statistics delivery addressee	Text	100	Library contact name.	DELIVERYADDRESS/ EPRODUCTADMIN
Usage statistics note	Text	500	Additional information regarding usage statistics.	NOTE/ EPRODUCTADMIN

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Usage statistics locally stored	Text	500	Information about and/ or links to locally stored data.	LOCALLYSTORED/ EPRODUCTADMIN
Hardware requirements - internal	Text	500	Internal information about hardware requirements and restrictions.	HARDWARE REQUIREMENTS PRIVATE/ EPRODUCTADMIN
Hardware requirements - public	Text	500	Public information about hardware requirements and restrictions.	HARDWARE REQUIREMENTS PUBLIC/ EPRODUCTADMIN
Software requirements - internal	Text	500	Internal information about software requirements.	SOFTWARE REQUIREMENTS PRIVATE/ EPRODUCTADMIN
Software requirements - public	Text	500	Public information about software requirements.	SOFTWARE REQUIREMENTS PUBLIC/ EPRODUCTADMIN
Maintenance window value	Text	250	The provider's regularly scheduled downtime window for this product. The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.	MAINTENANCE WINDOWVALUE/ EPRODUCTADMIN
Provider system status URI	Text	500	The URI at which the provider posts system status information.	PROVIDERSYSTEM STATUSURI/ EPRODUCTADMIN
Provider system status URI type	Code	10	The URI type used to post system status information. The possible values are URN and URL.	PROVIDERSYSTEM STATUSURITYPE/ EPRODUCTADMIN

Table 75. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Local performance monitoring note	Text	500	Information concerning Web sites or programs that carry out local performance monitoring.	LOCALPERFORMANCE MONITORINGNOTE/ EPRODUCTADMIN
Incident log	Text	500	A log of downtime and problem reports, as well as their resolution.	INCIDENTLOG/ EPRODUCTADMIN
Training information	Text	500	Information regarding the availability of special training—for example, instructions on how to bypass simultaneous user restrictions. May also include training contact names and other general information.	TRAINING INFORMATION/ EPRODUCTADMIN
Administrative documentation	Text	500	Information about, and/ or location of, documentation available for product administrators.	ADMIN DOCUMENTATION/ EPRODUCTADMIN
User documentation	Text	500	Information about, and/ or location of, documentation available for end users.	USER DOCUMENTATION/ EPRODUCTADMIN

Admin Loader Workflow

After Verde verifies that the admin input file is in the correct format and includes the mandatory **Match** column, Verde examines the **Match** field:

- If no match is found for this field, the line is rejected.
- If Verde retrieves matches for more than one e-product, the line is rejected.
- If only one related e-product is found, Verde checks the validity of the other fields in the input file. If the fields are in the correct format, an admin record is created. Otherwise, the line is rejected.

About Local Admin Input Files

Verde's local admin loader loads the local admin input file. This input file loads the local admin records that need to be added to the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The local admin input file's columns are described in **Table 76**.

Local Admin Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- The input file includes mandatory columns. When an input file does not contain mandatory columns, it is not loaded to Verde and an error is logged in the summary.
- The mandatory columns contain values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.
- The following fields are mandatory:
  - **Match**
  - **Library**
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.

Local Admin Input File Fields

The following table describes the input file fields for the local admin loader.

Table 76. Local Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Match (mandatory)	Text	30	Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product (appears in the **Interoperability** tab of the e-product's page) **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	EPRODUCTCODE/ EPRODUCTG_SFXID/ EPRODUCT
Library (mandatory)	Text	100	Library name or library code **Note:** The library inserted into the input file should be defined as a library in Verde.	INSTITUTION/ EPRODUCTLOCAL ADMIN
Local Admin user name	Text	255	Local admin user name	ADMINUSER/ EPRODUCTLOCAL ADMIN
Local Admin password	Text	255	Local admin password	ADMINPASSWORD/ EPRODUCTLOCAL ADMIN

Table 76. Local Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Local Admin password note	Text	255	Local admin password note	ADMINPASSWORD NOTE/ EPRODUCTLOCAL ADMIN
Usage statistics user name	Text	255	The identifier used for online access to the usage statistics file.	USAGESTATISTICSUSER/ EPRODUCTLOCAL ADMIN
Usage statistics password	Text	255	The password used for online access to the usage statistics management site or dataset.	USAGESTATISTICS PASSWORD/ EPRODUCTLOCAL ADMIN
Usage statistics password note	Text	255	Additional information regarding usage statistics.	USAGESTATISTICS PASSWORDNOTE/ EPRODUCTLOCAL ADMIN

Local Admin Loader Workflow

After Verde verifies that the local admin input file is in the correct format and includes mandatory columns, it examines the **Match** field:

- If no match is found for this field, the line is rejected.
- If Verde retrieves more than one e-product, the line is rejected.
- Otherwise, Verde checks whether an admin record exists for the e-product:
  - If an admin record is not found, the line is rejected.
  - If an admin record is found, Verde checks the **Library** field value in the input file:
    - If a match is not found, the line is rejected.
    - If a match is found, Verde creates the local admin record.

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Access and Access Authorization Input Files

This section includes:

- **About Access Input Files** on page **447**
- **Access Input File Rules** on page **448**
- **Access Input File Fields** on page **450**
- **Access Loader Workflow** on page **459**
- **About Access Authorization Input Files** on page **460**
- **Access Authorization Input File Rules** on page **460**
- **Access Authorization Input File Fields** on page **462**
- **Access Authorization Loader Workflow** on page **464**

About Access Input Files

Verde's access loader loads the access input file. This input file loads access records that must be added to, or updated in, the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The access input file's columns are described in **Table 79**.

Access Input File Rules

Before loading your input file, ensure that the file follows these rules:

- The input file includes the mandatory **Match** and **Access Type** columns. When an input file does not contain the mandatory columns, it is not loaded to Verde and an error is logged in the summary.
- The mandatory columns contain values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.
- There are four possible access types in Verde: **WWW** (Web interface), **Z39.50**, **XML**, and **SRW/SRU**. It is possible to attach up to four access records with different access types to a single e-product.
- If you want to load access records with different access types, it is recommended that you use the **AccessLoaderFullListTemplate** template that includes a full list of fields. Some of the fields are common to all access types. Other fields are relevant only for specific access types.
- If you want to load access records for a specific access type, use one of the following templates (each template available for a specific access type):
  - **AccessLoaderWWWTypesTemplate**
  - **AccessLoaderXMLTypesTemplate**
  - **AccessLoaderZ39TypesTemplate**
  - **AccessLoaderSRW_SRUTypesTemplate**

  The templates are saved on the server in the `examples_and_templates` directory. For more information, see **Loading Input Files to Verde** on page 320.
- Input values that are not relevant for the defined access type are ignored.
- Some fields are mandatory for several access types. For a full list of mandatory fields for each access type, see the following table:

Table 77. Access Types – Mandatory Columns

Access Type	Mandatory Columns
WWW	None
Z39	Z39.50 address, z39.50 port
XML	XML port
SRW/SRU	SRW/SRU, base URL

- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field or a default value is supplied. The following fields in the access record have default values:

Table 78. Access Record – Default Values

Access Type	Field	Default Value
All	Access Status	Active
All	Implemented authorization method	Null
All	Alternate authorization method	Null
All	IP address registration method	Online
WWW	Primary access URI type	URL
WWW	Alternate access URI type	URL
WWW	Local Persistent URI type	URL
SRW/SRU	SRW/SRU port	0

- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.

Access Input File Fields

The following table describes the input file fields for the access loader.

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Match (mandatory field) (Oracle Field/ Oracle Table: EPRODUCT CODE/ EPRODUCT G_SFXID/ EPRODUCT)	Text	30	Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product (appears in the **Interoperability** tab of the e-product's page) **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	All
Access type (mandatory field) (Oracle field/ Oracle table: ACCESSTYPE/ EACCESS)	Text	255	The possible values are: ■ WWW ■ Z39 ■ XML ■ SRW/SRU	All
Access status (mandatory field) (Oracle field/ Oracle table: ACCESSSTATUS/ EACCESS)	Code	30	The possible values are: ■ Active ■ Inactive ■ Test These fields can be customized in the code table.	All

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Domain names (Oracle field/ Oracle table: DOMAIN NAMES/ EACCESS)	Text	250	Domain names	All
Implemented authorization method (Oracle field/ Oracle table: IMPLAUT METHOD/ EACCESS)	Code	30	The possible values are: ■ Empty ■ Certificate ■ IP address ■ IP address + password ■ Other ■ Password ■ Script ■ Unrestricted ■ Method 1 ■ Method 2 ■ Method 3 These fields can be customized in the code table.	All

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Alternate authorization method (Oracle field/ Oracle table: ALTERNATE AUTMETHOD/ EACCESS)	Code	30	The possible values are: ■ Empty ■ Certificate ■ IP address ■ IP address + password ■ Other ■ Password ■ Script ■ Unrestricted ■ Method 1 ■ Method 2 ■ Method 3 These fields can be customized in the code table.	All
Authorization method note (Oracle field/ Oracle table: AUTMETHOD NOTE/EACCESS)	Text	500	Authorization method note	All
IP address registration method (Oracle field/ Oracle table: IPADDRESSREGM ETHOD/ EACCESS)	Code	30	The possible values are: ■ Online ■ Send to provider ■ Method 1 ■ Method 2 ■ Method 3 These fields can be customized in the code table.	All

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
IP address registration instructions (Oracle field/ Oracle table: IPADDRESSREG INSTRUCTION/ EACCESS)	Text	500	IP address registration instructions	All
IP address general note (Oracle field/ Oracle table: IPADDRESS GENERALNOTE/ EACCESS)	Text	500	IP address general note	All
Access information note (Oracle field/ Oracle table: ACCESSINFO NOTE/EACCESS)	Text	500	Access information note	All
Access implementation status (Oracle field/ Oracle table: WWW_ IMPLEMENTA TIONSTATUS/ EACCESS)	Code	30	Access implementation status	WWW
Primary access URI (Oracle field/ Oracle table: WWW_PRIMARY ACCESSURI/ EACCESS)	Text	500	Primary access URI	WWW

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Primary access URI type (Oracle field/ Oracle table: WWW_PRIMARY ACCESSURITYPE/ EACCESS)	Code	30	The possible values are: ■ URL ■ URI ■ Undetermined ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized in the code table.	WWW
Alternate URI (Oracle field/ Oracle table: WWW_ ALTERNATEURI/ EACCESS)	Text	500	Alternate URI	WWW
Alternate access URI type (Oracle field/ Oracle table: WWW_ ALTERNATEURI TYPE/EACCESS)	Code	30	The possible values are: ■ URL ■ URI ■ Undetermined ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized in the code table.	WWW
Local persistent URI (Oracle field/ Oracle table: WWW_LOC PERSISTENTURI/ EACCESS)	Text	500	Local persistent URI	WWW

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Local persistent URI type (Oracle field/ Oracle table: WWW_LOC PERSISTENTURI TYPE/EACCESS)	Code	30	The possible values are: ■ URL ■ URI ■ Undetermined ■ Type 1 ■ Type 2 ■ Type 3 These fields can be customized in the code table.	WWW
Persistent name (Oracle field/ Oracle table: WWW_ PERSISTENT NAME/EACCESS)	Text	50	Persistent name	WWW
Access check performed (Oracle field/ Oracle table: WWW_CHECK PERFORMED/ EACCESS)	Boolean	1	Access check performed	WWW
Check performed on (Oracle field/ Oracle table: WWW_CHECK DATE/EACCESS)	Date		Check performed on	WWW
Z39.50 address (mandatory field – for Z39 access type) (Oracle field/ Oracle table: Z39_ADDRESS/ EACCESS)	Text	250	Z39.50 address	Z39

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Z39.50 port (mandatory field – for Z39 access type) (Oracle field/ Oracle table: Z39_PORT/ EACCESS)	Integer	19	Z39.50 port	Z39
Z39.50 version supported (Oracle field/ Oracle table: Z39_VERSION SUPPORTED/ EACCESS)	Text	50	Z39.50 version supported	Z39
Z39.50 use attributes (Oracle field/ Oracle table: Z39_ATTRIBUTES/ EACCESS)	Text	500	Z39.50 use attributes	Z39
Z39.50 information from vendor (Oracle field/ Oracle table: Z39_URLINFO/ EACCESS)	Text	500	Z39.50 information from vendor	Z39
Z39.50 database name - long (Oracle field/ Oracle table: Z39_Z39DBLONG NAME/EACCESS)	Text	100	Z39.50 database name - long	Z39

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Z39.50 database name - short (Oracle field/ Oracle table: Z39_Z39DB SHORTNAME/ EACCESS)	Text	50	Z39.50 database name - short	Z39
Z39.50 note (Oracle field/ Oracle table: Z39_NOTE/ EACCESS)	Text	500	Z39.50 note	Z39
XML Base URL (Oracle field/ Oracle table: XML_BASEURL/ EACCESS)	Text	500	XML Base URL	XML
XML port (mandatory field – for XML access type) (Oracle field/ Oracle table: XML_PORT/ EACCESS)	Integer	19	XML port	XML
Link to DTD (Oracle field/ Oracle table: XML_SRW_LINK TODTD/ EACCESS)	Text	500	Link to DTD	XML, SRW/ SRU
DTD note (Oracle field/ Oracle table: XML_SRW_DTD NOTE/EACCESS)	Text	500	DTD note	XML, SRW/ SRU

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
URL to XML information from vendor (Oracle field/ Oracle table: XML_SRW_URL INFO/EACCESS)	Text	500	URL to XML information from vendor	XML, SRW
XML gateway note (Oracle field/ Oracle table: XML_NOTE/ EACCESS)	Text	500	XML gateway note	XML
SRW/SRU (mandatory field – for SRW/SRU access type) (Oracle field/ Oracle table: XML_SRWSRU/ EACCESS)	Text	10	Possible values are: ■ SRW ■ SRU	SRW/ SRU
SRW Base URL (mandatory field – for SRW/SRU access type) (Oracle field/ Oracle table: SRW_BASEURL/ EACCESS)	Text	500	SRW Base URL	SRW/ SRU
SRW/SRU port (Oracle field/ Oracle table: SRW_PORT/ EACCESS)	Integer	19	SRW/SRU port	SRW/ SRU

Table 79. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
SRW/SRU version supported (Oracle field/ Oracle table: SRW_VERSION SUPPORTED/ EACCESS)	Text	500	SRW/SRU version supported	SRW/ SRU
SRW/SRU attributes (Oracle field/ Oracle table: SRW_ ATTRIBUTES/ EACCESS)	Text	500	SRW/SRU attributes	SRW/ SRU
SRW/SRU note (Oracle field/ Oracle table: NOTE/EACCESS)	Text	500	SRW/SRU note	SRW/ SRU

Access Loader Workflow

After Verde checks whether the access input file is in the correct format and includes the mandatory **Match** and **Access Type** columns, Verde examines the **Match** field value:

- If no match is found for this field value, the line is rejected.
- If Verde retrieves matches for more than one e-product, the line is rejected.
- If only one related e-product is found, Verde examines the **Access type** field value:
  - If an access record with the defined access type exists for the e-product, Verde updates the access record.
  - Otherwise, Verde checks the values of the mandatory fields for the defined access type.
    - If values do not exist, the line is rejected.

- If values do exist, Verde verifies the validity of the other fields in the input file. If the fields are in the correct format, an access record is created. If the fields are not in the correct format, the line is rejected.

About Access Authorization Input Files

Verde's access authorization loader loads the access authorization input file. This input file loads the access authorization records that need to be added to the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded.

NOTE:
The access authorization loader only creates access authorization records and does not update these records. Each time you load new access authorization records, the previous ones are deleted. Thus, if you want to update one or two fields in an existing access authorization record, it is recommended that you do so manually, in the KB Manager module.

The access authorization input file columns are described in **Table 80**.

Access Authorization Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- The input file includes mandatory columns. When an input file does not contain mandatory columns, it is not loaded to Verde and an error is logged in the summary.
- The mandatory columns contain values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.
- The following columns are mandatory:
  - **Match**
  - **Access Type**
  - **Library**
- An access authorization record lists the valid libraries for the instance, including related access authorization data for these libraries. A library that is included in an input line is treated as active by the related access authorization record. All other libraries that are not listed in the input line but exist in the instance, are saved as inactive in the newly created access authorization record.

  For example, if there are 10 libraries in an instance in which a loading occurs, two libraries (1 and 2) are included in the access authorization input file's **Library** field for e-product X and access type Y. In the access authorization record created via loading for e-product X and access type Y, libraries 1 and 2 will be active and the other libraries (3-10) will be inactive.

- If each library has its own access authorization record, you must create a separate input line for each library. In this case, the input file will contain lines with the same **Match** and **Access type** values, but different **Library** values.
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.

Access Authorization Input File Fields

The following table describes the input file fields for the access authorization loader.

Table 80. Access Authorization Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Match (mandatory field)	Text	30	Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product (appears in the **Interoperability** tab of the e-product's page) **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the Match column as text. If the Match column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	EPRODUCT CODE/EPRODUCT G_SFXID/ EPRODUCT
Access type (mandatory field)	Text	30	The possible values are: ■ WWW ■ Z39 ■ XML ■ SRW/SRU	ACCESSTYPE/ EACCESS
Library (mandatory field)	Text	255	Library name or library code.	INSTITUTION/ ACCESS AUTHORIZATION
Proxy server decision	Boolean	1	Proxy server decision	INCLUDEEXCLUDE/ ACCESS AUTHORIZATION

Table 80. Access Authorization Input File Fields

Field Name	Type of Field	Field Length	Description	Oracle Field/ Oracle Table
Proxy registration status	Code	10	The possible values are: ■ Not applicable ■ To be registered ■ Registration in process ■ Registered ■ Status 1 ■ Status 2 ■ Status 3 These fields can be customized in the code table. The default value is **Not applicable**.	PROXYREGSTATUS/ ACCESS AUTHORIZATION
Proxy note	Text	250	Proxy Note	PROXYNOTE/ ACCESS AUTHORIZATION
Electronic resource user identifier	Text	100	Electronic resource user identifier	ERESOURCEUSERIDENT/ACCESS AUTHORIZATION
Electronic resource user password	Text	100	Electronic resource user password	ERESOURCEUSERPASSWORD/ACCESS AUTHORIZATION
Electronic resource local user identifier	Text	100	Electronic resource local user identifier	ERESOURCELOCUSERIDENT/ ACCESS AUTHORIZATION
Electronic resource user password note	Text	250	Electronic resource user password note	ERESOURCEUSERPASSWORDNOTE/ ACCESS AUTHORIZATION

Access Authorization Loader Workflow

After Verde verifies that the access authorization input file is in the correct format and includes mandatory columns, Verde examines the **Match** field value:

- If no match is found for this field value, the line is rejected.
- If Verde retrieves matches for more than one e-product, the line is rejected.
- If only one related e-product is found, Verde examines the **Access type** field value:
  - If an access record with the defined access type does not exist for the e-product, the line is rejected,
  - If an access record with the defined access type does exist for the e-product, Verde proceeds to search for a record in the database that matches the value in the **Library** field:
    - If no match is found, the line is rejected.
    - If a double match is found, the line is rejected.
    - If only one match is found, Verde removes the existing access authorization record and creates a new one.

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View Loader Output

This section includes:

- **Viewing Loader Output** on page **465**
- **Viewing the Report Summary** on page **467**
- **Viewing the Report File** on page **468**

Viewing Loader Output

When you load an input file, an output file containing report summary information is created. The format and general delivery settings of the report are defined when setting the input file load settings (see **Loading Input Files to Verde** on page **320**).

The View Loader Output options and functionality are similar to those of the View Report Output, as described in **View Report Output** on page **269**.

To view the loader output:

1. From the **Select a tool** drop-down list, select **View Loader Output**.
2. Select the loader from the list of loaders.

3 In the **Loader** menu, select the report you want to view.

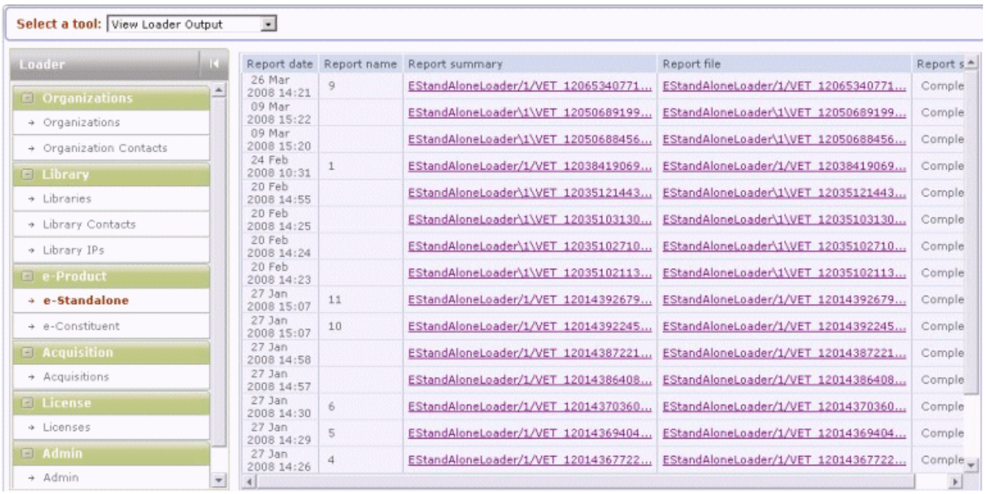


Figure 145: Loader Output Report

The following information is displayed for each loader output:

- **Report date** – The date on which the report was created.
- **Report name** – The name given to the report. This is specified while defining the load output settings during the run.
- **Report summary** – A link to the text file containing the load's report summary. Click the link to view the load's report summary. For a description of the report summary, see **Viewing the Report Summary** on page **467**.
- **Report file** – A link to the XML, CSV, or PRN file containing the load's report file. Click the link to view the load's report file. For a description of the report file, see **Viewing the Report File** on page **468**.
- **Report status** – The status of the report. The following statuses are possible: **In Process**, **Complete**, **Failed**.

Viewing the Report Summary

The report summary contains a summary of the load process, including a list of the records that were updated or added and the input file statistics.

```
VET_1204012738462_3[1].1204012738743_summary.txt - Notepad
File  Edit  Format  View  Help
PARAMETERS IN USE
------------------------------------------------------
Update database: false
Input file:
/exlibris/verde/v2_4/verde/home/data/import/tmp_C0BC52E1357CD16061
EFEDB84C1532E3_1204012738441_unittestexamples.xls
License Dates: null
Default License Status: FINAL_VERSION
Default Licensee: null
Default Licensor: null
Default Renewal Type: EXPLICIT

Running mode: online


SUMMARY
------------------------------------------------------
Start date:    Tue Feb 26 09:58:58 IST 2008
End date:      Tue Feb 26 09:59:58 IST 2008
Elapsed time: 0 days, 0 hours, 0 min, 59 sec
-------------------------------------------
Instance: INST1
-------------------------------------------
Number of rows found in the input file : 65
Number of new rows found in the input file : 0
Number of existing rows found in the input file : 1
Number of rejected rows : 64
=============================================================
```

Figure 146: Load Report Summary

The **Parameters in Use** section of the load report summary lists the information entered in the loaders screen.

The following table describes the **Summary** section of the load report summary:

Table 81. Load Report Summary

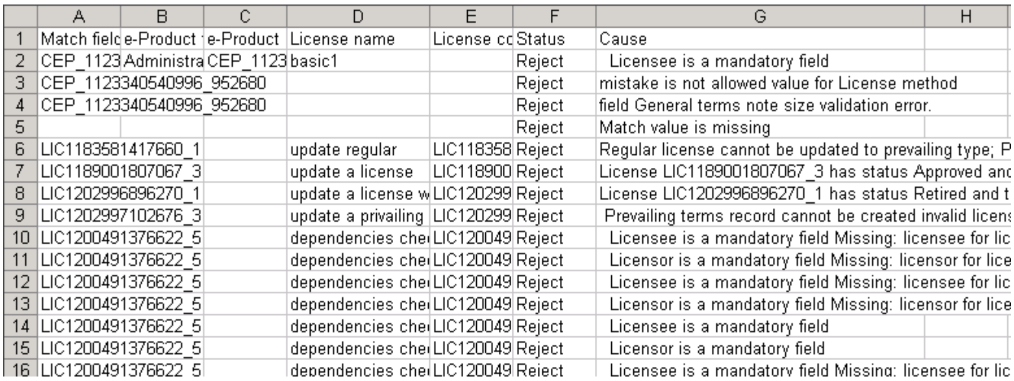
Field	Description
Start date	The date and time the run started.
End date	The date and time the run completed.
Elapsed time	The total number of days, hours, minutes, and seconds it took to complete the run.
Instance	The instance code of the Verde instance to which the records were loaded.
Reading File	The location of the input file and file name.
Total number of records in input file	The number of e-constituent/ acquisition/ license/ admin/ library/organization records in the input file.
Number of new records in input file	The number of new e-constituent/ acquisition/ license/ admin/library/organization records in the input file.

Table 81. Load Report Summary

Field	Description
Number of existing records	The number of existing e-constituent/ acquisition/ license/ admin/library/organization records that updated successfully.
Number of rejected records	The number of e-constituent/ acquisition/ license/ admin/ library/organization records that were rejected.

Viewing the Report File

The report file contains summary details regarding each of the input file's records.



	A	B	C	D	E	F	G	H
1	Match fielc	e-Product	e-Product	License name	License cc	Status	Cause	
2	CEP_1123	Administra	CEP_1123	basic1		Reject	Licensee is a mandatory field	
3	CEP_1123340540996_952680					Reject	mistake is not allowed value for License method	
4	CEP_1123340540996_952680					Reject	field General terms note size validation error.	
5						Reject	Match value is missing	
6	LIC1183581417660_1			update regular	LIC118358	Reject	Regular license cannot be updated to prevailing type; P	
7	LIC1189001807067_3			update a license	LIC118900	Reject	License LIC1189001807067_3 has status Approved anc	
8	LIC1202996896270_1			update a license w	LIC120299	Reject	License LIC1202996896270_1 has status Retired and t	
9	LIC1202997102676_3			update a privailing	LIC120299	Reject	Prevailing terms record cannot be created invalid licens	
10	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensee is a mandatory field Missing: licensee for lic	
11	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensor is a mandatory field Missing: licensor for lice	
12	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensee is a mandatory field Missing: licensee for lic	
13	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensor is a mandatory field Missing: licensor for lice	
14	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensee is a mandatory field	
15	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensor is a mandatory field	
16	LIC1200491376622_5			dependencies che	LIC120049	Reject	Licensee is a mandatory field Missing: licensee for lic	

Figure 147: Report File

The report provides the following information for all loader types, per record:

- Match field – Match value in the input file.
- Status – Possible values are:
  - New, Updated, Rejected – for e-constituent/e-standalone/license/access loaders
  - New, Rejected – for admin/access authorization loaders
  - Failure, Success – for organization/library/acquisition/Aleph Vendor Converter loaders
- Cause – If the record was rejected, the reason for the rejection.

In addition to the information that is provided for all loader types and described above, the following loaders can have additional columns that provide specific information:

- e-Constituent loader
  - e-Product Title – the e-product title of a new or updated e-constituent/e-standalone
  - e-Package Title
- License loader:
  - e-Product Title – the e-product title of an e-product associated with a new license.
  - e-Product Code – the e-product code of an e-product associated with a new license.
  - License Name – the license name of a new or updated license.
  - License Code – the license code of a new or updated license.
- Acquisition loader:
  - Sequence – the number of lines in the acquisition input file
  - Match Field – the match type in the acquisition input file (e-product code, SFX ID, or title).
  - e-Product Code
  - Acquisition Number

35

Transferring Local Data

This section includes:

- **About Transferring Local Data** on page **471**
- **Working with the Transfer Local Data Screen** on page **472**
- **Transfer Data Process Rules** on page **478**
- **List of Transferred e-Product Fields** on page **479**

About Transferring Local Data

You use the Transfer Local Data screen in the KB Tools module to transfer data from locally created e-products to their matching globally created e-products in the KnowledgeBase.

The sets displayed in the Transfer Local Data screen are created by a background job that runs twice a month, on the 5th and 20th days of the month. This background job:

- retrieves all locally created e-products
- compares the locally created e-products with the identifiers of globally created e-products if the locally created e-products have at least one of the following identifiers: **e-ISSN**, **ISSN**, **e-ISBN**, or **ISBN**
- if the above-mentioned identifiers do not exist or if the above comparison yields no results, compares the titles of locally created e-products with the titles of globally created e-products
- displays the status **New** for the set if a match based on the identifier or title is found
- displays the status **No match** for the set if no match is found
- retrieves the first 200 matches if there are multiple matches

The background job details, such as the job's status, the date on which it was last run, and the date on which it will next be run, are shown in the top pane of the Transfer Local Data screen.

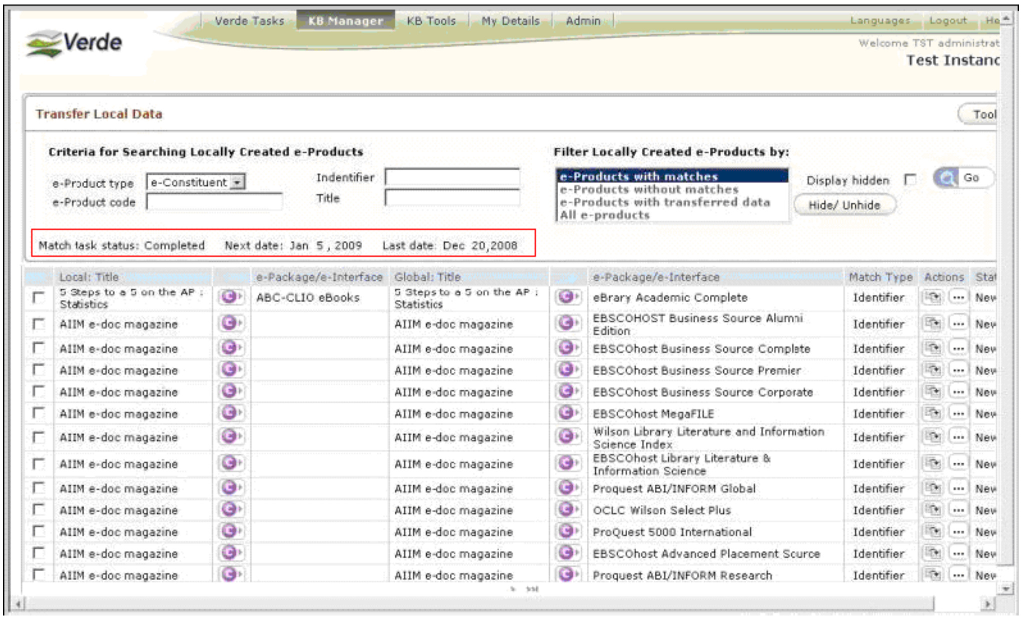


Figure 148: Transfer Local Data Screen - Background Job Details

NOTES:

- For information on the lifecycle of locally created e-products, see **Lifecycle of Locally Created e-Constituents and e-Standalones** on page **84**.
- If you want to transfer local data quickly among a wide range of e-products, use the Advanced Transfer Wizard (see **Advanced Transfer Wizard** on page **95**).

Working with the Transfer Local Data Screen

The Transfer Local Data screen enables you to:

- search for specific locally created e-products based on specific criteria
- filter locally created e-products according to certain predefined criteria
- view a list of the locally created e-products that meet the search and filter criteria and the globally created e-products with which the Verde system has matched these locally created e-products (if a match has been found)
- select a different globally created e-product that you know matches a specific locally created e-product

- transfer data from a locally created e-product to its matching globally created e-product
- hide irrelevant sets

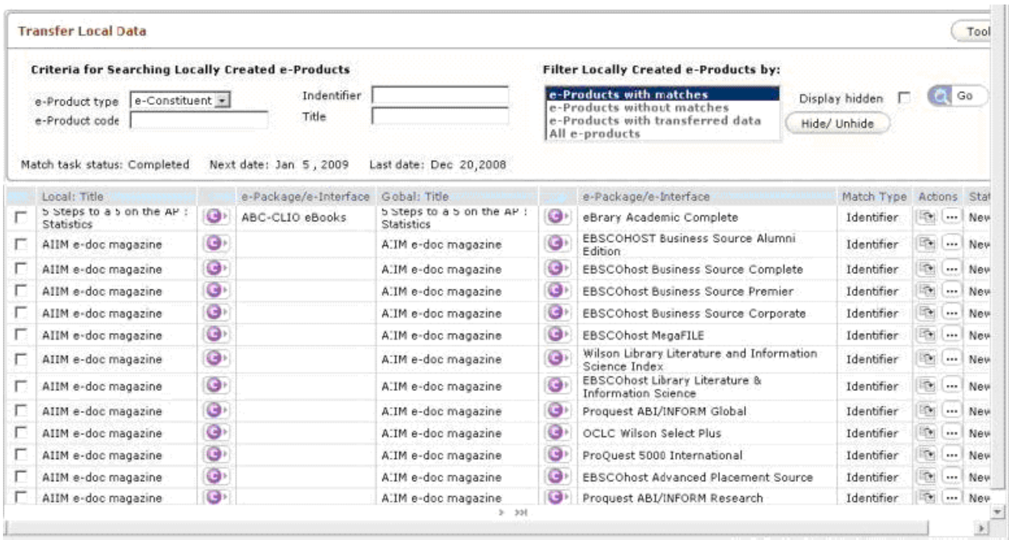


Figure 149: Transfer Local Data Screen

Search Criteria and Filter Options

In the top area of the Transfer Local Data screen, you define the search criteria and select the filter option to be used in locating the locally created e-products you want to view.

NOTE:

When you open the Transfer Local Data screen for the first time, e-products are displayed according to the default search parameters and filter option, which are locally created e-constituents with matches.

The search is performed in the Oracle database table that is updated twice a month (on the 5th and 20th days of the month). The search results, therefore, include all e-products that were created prior to the database table update.

To define search criteria and select a filter option:

1 In the **e-Product type** box, select the type of locally created e-product you want to view. Possible options are **e-Constituent**, **e-Standalone**, or **Both** (that is, both e-constituents and e-standalones).

NOTE:
You can transfer data from/to e-constituents and e-standalones only. You cannot transfer data from/to e-interfaces and e-packages.

2 If you want to view a specific locally created e-product, enter its code, identifier (that is, the ISSN, ISBN, e-ISSN, or e-ISBN), or title in the **e-Product code**, **Identifier**, or **Title** box, respectively.

3 Select one of the following filter options from the **Filter Locally Created e-Products by** box:

- **e-Products with matches** – retrieves sets of matching locally and globally created e-products with the status **New**. These sets are ready for data transfer.
- **e-Products without matches** – retrieves a list of locally created e-products that have no matching globally created e-products. The status of these e-products is **Not found**.
- **e-Products with transferred data** – retrieves sets of matching locally and globally created e-products with the status **Transferred**. For these sets, local data has already been transferred from locally to globally created e-products.

NOTE:
The sets retrieved by this filter are displayed if the locally created e-product exists. When the locally created e-product is deleted, these sets are removed from the Transfer Local Data screen.

- **All e-products** – retrieves all locally created e-products. Statuses include **New**, **Not found**, and **Transferred** (indicating that data has already been transferred for the locally created e-product).

NOTE:
The filter options can be customized by modifying the code table.

4 Click **Go**. The locally created e-products that meet the criteria you defined and the filter option you selected are displayed.

Displayed e-Products

The locally created e-products that meet the defined search and filter criteria are displayed in the main section of the Transfer Local Data screen.

NOTE:
A local e-product can have more than one matching global e-product.

This screen contains the following columns:

Table 82. Transfer Local Data Screen Columns

Column	Description
Local: Title	The title of the locally created e-constituent or e-standalone
Clickable icon button	e-Constituent or e-standalone icon button. When you click this button, you can view details of the locally created e-constituent/e-standalone in the KB Manager.
e-Package/e-Interface	The title of the locally created e-product's parent e-product (e-package for e-constituent and e-interface for e-standalone)
Global: Title	The title of the matching globally created e-constituent or e-standalone
Clickable icon button	e-Constituent or e-standalone icon button. When you click this button, you can view details of the globally created e-constituent/e-standalone in the KB Manager.
e-Package/e-Interface	The title of the globally created e-product's parent e-product (e-package for e-constituent and e-interface for e-standalone)
Match Type	The criteria by which Verde has identified the match. Possible values are **Identifier** or **Title**.
Actions	Contains the following two options: ■ **Transfer Data** – transfers data from the locally created e-product to the matching globally created e-product according to the rules delineated in **Transfer Data Process Rules** on page **478**. ■ **Select Match** – enables you to manually select a matching globally created e-product for the selected locally created e-product. For details, see **Select Match** on page **477**. **Note:** If the status of the set is **Transferred**, no actions are available in the Actions column.

Table 82. Transfer Local Data Screen Columns

Column	Description
Status	The status of the locally created e-product. Possible values are: ■ **New** – Verde has retrieved a matching globally created e-product. ■ **Not found** – Verde could not locate a matching globally created e-product. ■ **Transferred** – Data has been transferred from the locally created e-product to its matching globally created e-product.

NOTE:
The match types and statuses can be customized by modifying the code table.

To hide irrelevant sets:

1 Select the check boxes to the left of the sets.

2 Click the **Hide/Unhide** button.

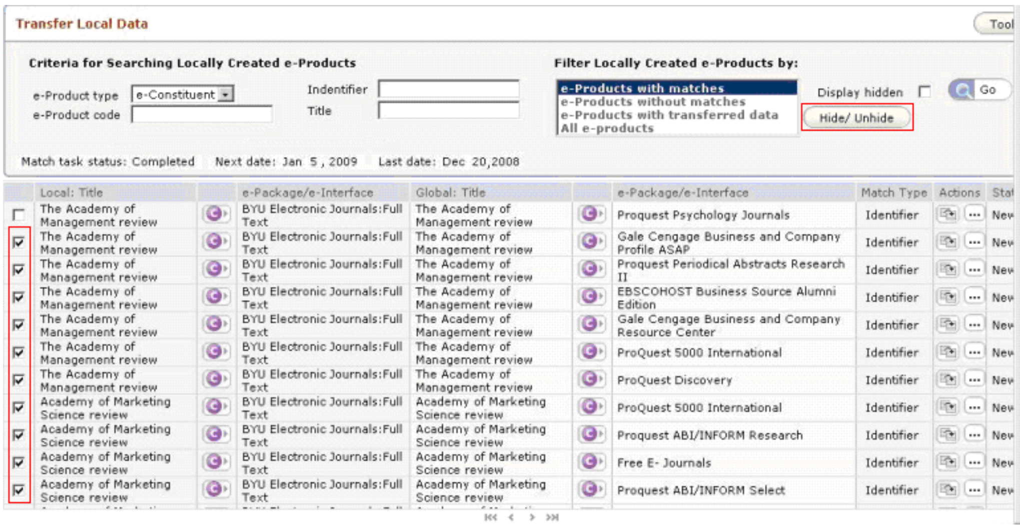


Figure 150: Transfer Local Data Screen - Hiding Sets

As long as these sets are hidden, they will not be displayed as part of your search results. They will be saved as hidden sets until you unhide them.

To view hidden sets:

Select the **Display hidden** check box and click **Go**.

To unhide sets:

1. Clear the check boxes to the left of the sets you want to unhide.
2. Click the **Hide/Unhide** button.

NOTE:
You must click the **Hide/Unhide** button for each page separately. If you select a check box and go to the next page without clicking the **Hide/Unhide** button, the set you selected is not hidden/unhidden.

Select Match

If you know what globally created e-product matches a specific locally created e-product and this match does not appear in the Transfer Local Data screen, you can manually select the matching globally created e-product using the **Select Match** button.

To manually select a matching globally created e-product:

1. Retrieve the locally created e-product for which you want to select a matching globally created e-product.

2. Click the locally created e-product's **Select Match** button ... . The Select an e-Product to Match pop-up window opens.

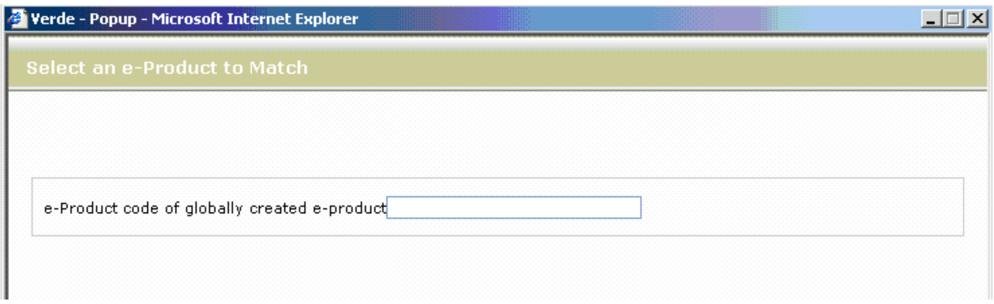


Figure 151: Select an e-Product to Match Pop-Up Window

3. Enter the e-product code of the matching globally created e-product and click **Submit**. Another pop-up window opens, displaying information about the selected globally created e-product. For example, the following message might be displayed:

> The **Academy of Management executive** is connected to the e-package, **Metapress Academy of Management**, provided by the e-interface, **Metapress**.

4 Click **Transfer** to transfer data, **Cancel** to cancel the action, or **Back** to return to the previous window.

Transfer Data Process Rules

When you click the **Transfer Data** button and confirm that you want to transfer data, all data from the locally created e-product is moved to the corresponding globally created e-product that is listed in columns 4 to 6 of the Transfer Local Data screen. You can view the results of the transfer data process by clicking the icon button of the globally created e-product.

The transfer data process operates according to the following rules:

- If the globally created e-product contains local data, this data is removed.
- Data is transferred in the following cases only:
  - from a locally created e-constituent to a globally created e-constituent
  - from a locally created e-standalone to a globally created e-standalone
  - from a locally created e-constituent to a globally created e-standalone
  - from a locally created e-standalone to a globally created e-constituent
- Data cannot be transferred:
  - to locally created e-products
  - to an e-interface or e-package
- The following data is transferred:
  - product fields (for a full list, see **List of Transferred e-Product Fields** on page **479**)
  - coverage
  - embargo
  - product libraries
  - attributes: acquisition, license, access, admin, cost, usage, trial (relevant only for data transfer from an e-standalone to an e-standalone)
- Open workflows related to e-products involved in the transfer data process are stopped.
- When data is transferred to a dependent e-constituent related to an aggregator package, the activation status and dates of the locally created e-product are removed. The activation status and dates of the globally created e-constituent remain as they were.

- The transfer of data is stopped when there is a conflict between the activation dates and status of an e-constituent and the e-package to which it is related. In such a case, the following message is displayed:

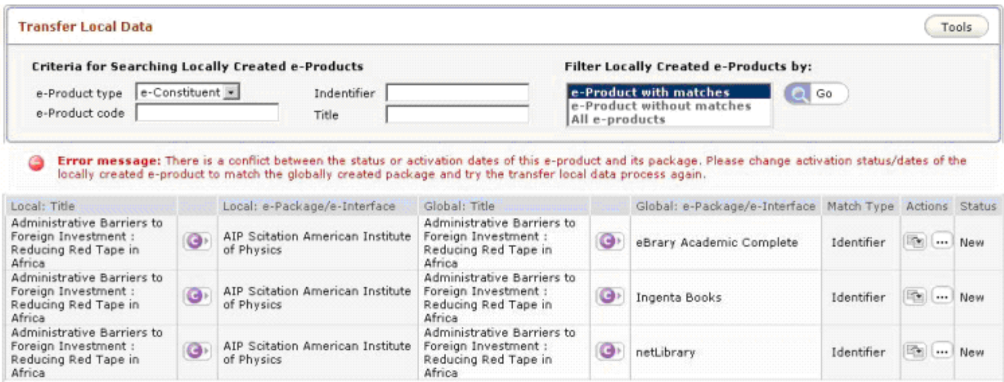


Figure 152: Transfer Data – Error Message

- The transfer of data is also stopped when data is transferred to an e-constituent of a selective package or to an independent e-constituent of an aggregator package and:
  - the e-constituent is active and the e-package is inactive
  - the activation dates of the e-constituent are not within the same range as the activation dates of its related e-package, such as in the following cases:
    - the **Activation from date** of the e-constituent is earlier than the **Activation from date** of its e-package
    - the **Expiration date** of the e-constituent is later than the **Activation from date** of its e-package
    - the e-constituent has no **Expiration date**, while its related e-package has an **Expiration date**

List of Transferred e-Product Fields

The following table lists the e-product fields that are transferred from the locally created e-product to the globally created e-product.

Table 83. Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
MetaLib ID	G_METALIBID	Pointer to matching record in MetaLib

Table 83. Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
ID number	G_OTHERID	Pointer to record ID in an alternate system
ID source	G_OTHERSOURCE	Name of the alternate system
Selection status	G_PROCUREMENTSTATUS	Selection status of the e-product
	G_PROCUREMENTSTATUSUPDATEDATE	Date when the selection status was updated
e-Product status	G_EPRODUCTSTATUS	Implementation status of the e-product.
	G_EPRODUCTSTATUSUPDATEDATE	Date when the e-product status was updated
Activation from date	ACTIVATIONFROMDATE	Date from which the e-product is active
Expiration date	ACTIVATIONTODATE	Date until which the e-product will be active
Internal note	G_PRIVATENOTE	Note that displays to Verde staff only
Concurrent Number of Users	CONCURRENTNUMBEROFUSERS	Relevant to e-package, e-interface, and e-standalone. Concurrent number of users for the e-resource.
Library contact	MAINCONTACT	Points to ORGCONTACTCODE field in the ORGANIZATION CONTACT table. Library contact name.
Sponsoring Library	SPONSERINGLIBRARY	Points to ORGANIZATION CODE field, in the ORGANIZATION table. Library responsible for the e-product.

Table 83. Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
Availability	COM_ACTIVITYSTATUS	Availability status - default for an active e-product is **Up** (UP).
Availability From	G_ACTIVITYSTATUSDATE FROM	Start of the period when the e-product will be unavailable – relevant only for e-standalones
Availability To	G_ACTIVITYSTATUSDATETO	End of the period when the e-product will be unavailable – relevant only for e-standalones
Availability note	COM_ACTIVITYSTATUSNOTE	Note to accompany availability status.
Public note	COM_PUBLICNOTE	Note that displays in external applications such as the OPAC, A-Z lists, and SFX. Currently not functional.
Free	ER_FREEORSUBSCRIPTION	Is the resource available free of charge. Default values are: ■ Free (FREE) ■ Subscription (SUBSCRIPTION)
Cross-ref enabled	ER_CROSSREFENABLED	The check box can be selected when the SFX customer is a CrossRef library affiliate member and linking to article level is available via CrossRef.
ILS Holdings ID	ER_PR_HOLDINGSINILS	Pointer to MARC record in ILS
Title key	S_C_TITLEKEY	Locally defined abbreviated title that can be added to the URL for direct linking

Table 83. Transferred e-Product Fields

Field Name in UI	Field Name in Oracle Tables	Description
Holdings note	ER_PR_HOLDINGSNOTE	A note regarding holdings
Local fields of e-product		

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View KB Reports and Scheduled Reports/ Tasks

This section includes:

- **Viewing KB Reports** on page **483**
- **Scheduled Reports/Tasks** on page **484**

Viewing KB Reports

The Verde task **Update the Local KnowledgeBase** (activated from the Admin module), produces a number of reports that can be viewed in the KB Tools module.

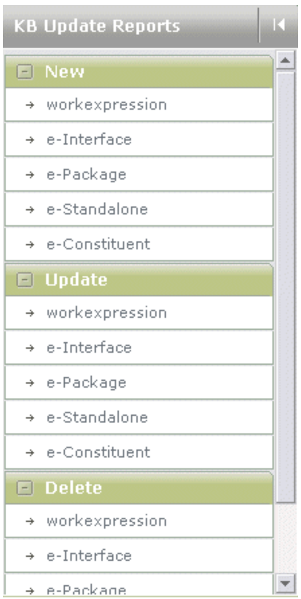

Figure 153: Viewing KB Manager Reports

Fifteen reports can be generated per instance, per update:

- New, Update and Delete
- Work expression
- e-Interface
- e-Package
- e-Standalone
- e-Constituent

For more information about the KnowledgeBase update process, refer to the *KnowledgeBase Update Process and Instructions Guide*.

Scheduled Reports/Tasks

Verde report and task options allow you to either run a report or task online, or to schedule it for a later time.

The **Scheduled Reports/Tasks** list provides details of all the jobs that have been scheduled and enables you to edit or delete a scheduled job.

Figure 154: Scheduled Reports/Tasks List

The summary display of jobs shows:

- the name of the job
- the process
- the date on which the job next runs
- the job creator
- the instance
- the reoccurrence pattern (for example, daily, weekly, monthly)
- the actions that can be performed (edit or delete)

The Job Scheduler can be searched and filtered by the person who initiated the task (creator).

Part IV

My Details Module

Part IV contains the following:

- **Section 37: My Details** on page **487**

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My Details

The My Details module enables the current Verde user to edit the following user details:

- the user's login name
- the user's password
- the user's full name
- the user's e-mail address
- the department to which the user belongs
- the user's telephone number(s)

The **Related library** is defined by the Verde administrator and cannot be modified in the My Details module.

NOTE:
The following fields are mandatory: **Login name**, **Password**, **Full name**, and **E-mail**.

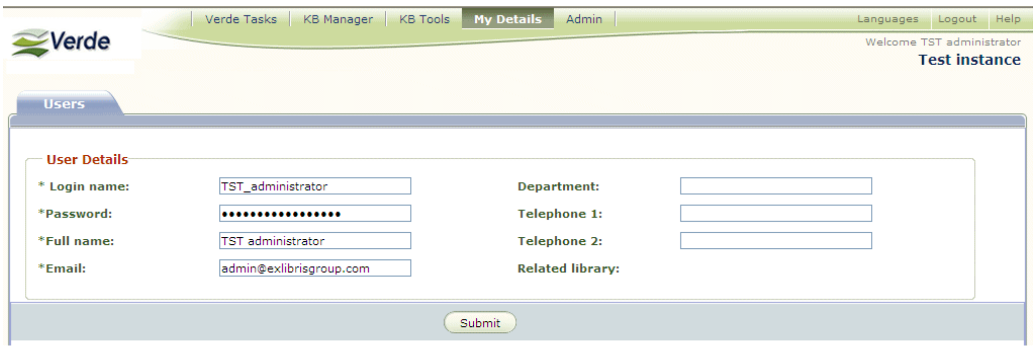

Figure 155: My Details Module

Part V

Verde Tasks Module

Part V contains the following:

- **Section 38: Verde Tasks** on page **491**

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Verde Tasks

Verde Tasks is the area where staff members can view various tasks waiting for some action or input. These tasks are usually a result of workflows that have been initiated in the system.

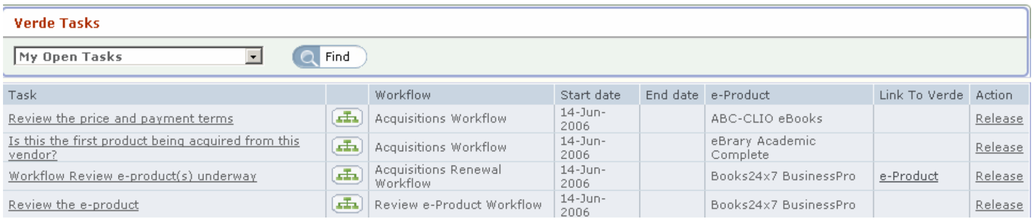
After clicking the **Verde Tasks** tab, the user is defaulted to the **Tasks** tab with a list of tasks related to the user's role.

The following options are available for filtering tasks:

- **My Open Tasks** – all the user's (owner's) open (active) tasks. This is a list of tasks for current activities and includes all the tasks that are waiting for the user.
- **My Closed Tasks** – all the user's (owner's) closed tasks. The list includes all the tasks that were handled by the user in the past (typically, the owner of the task is the user who works on it).
- **My Tasks** – a list of all the user's tasks (open and closed).
- **Unassigned Open Tasks** – all open tasks that do not have an owner and to which the same role as the user is assigned. For example, if a user has the role **Selector** and there is an open task with **Selector** as its assigned role, the task will be displayed for this user. Unassigned open tasks to which other roles are assigned (such as Licensor or Acquisitions) are not displayed for the user with the role **Selector**.

  The user can review unassigned tasks and choose those on which he/she wants to work. By clicking **Accept**, the user becomes the owner of task. The task is then displayed for the user in **My Open Tasks**.
- **My Open and Unassigned Tasks** – a list of the user's open tasks, as well as all tasks that have no owner and to which the same role as the user is

assigned. When this option is selected, the user can review the unassigned tasks and choose those on which he/she wants to work.


Verde Tasks

My Open Tasks   Find

Task		Workflow	Start date	End date	e-Product	Link To Verde	Action
Review the price and payment terms		Acquisitions Workflow	14-Jun-2006		ABC-CLIO eBooks		Release
Is this the first product being acquired from this vendor?		Acquisitions Workflow	14-Jun-2006		eBrary Academic Complete		Release
Workflow Review e-product(s) underway		Acquisitions Renewal Workflow	14-Jun-2006		Books24x7 BusinessPro	e-Product	Release
Review the e-product		Review e-Product Workflow	14-Jun-2006		Books24x7 BusinessPro		Release

Figure 156: Verde Tasks

NOTE:

The workflow can be configured so that when new tasks are opened, an e-mail alert is sent to all relevant users. For details on workflow configuration, see **Workflow Configuration** on page **201**.

The task summary screen displays the following information:

- the name of the task – Click the name to open the task. Note that the task window that opens also includes a summary of the related e-interface and e-package at the top of the window. (This information does not display when opening a task from the e-product record in the KB Manager.)
- the Workflow icon – Click the workflow icon to display the workflow diagram. Note that the Workflow icon displays only for open tasks for which the user is the owner. The diagram uses the following color-coding scheme:
    - White = manual tasks
    - Grey = automatic tasks
    - Blue = tasks that are not displayed in the list of tasks
    - Red outline = tasks that are currently active
- the name of the workflow—**License**, **Acquisitions**, or **Review e-Product** and **Renew Acquisitions**—to which the task belongs
- the date on which the workflow began
- the date on which the workflow ended (is blank for open tasks)
- the name of the e-product related to the task
- a link to the relevant e-product
- the actions—**Accept** or **Release**—that can be applied to the task – By clicking **Accept**, the user becomes the owner of the task. By clicking **Release**, the user relinquishes ownership of the task and the task disappears from the list of open tasks. For open tasks, the only action option is **Release**.

A user with administrator password privileges is able to access the additional Verde Tasks **Admin** tab. Using this tab, the administrator can:

- review all open tasks
- assign owners to unassigned tasks
- change the owners of open tasks

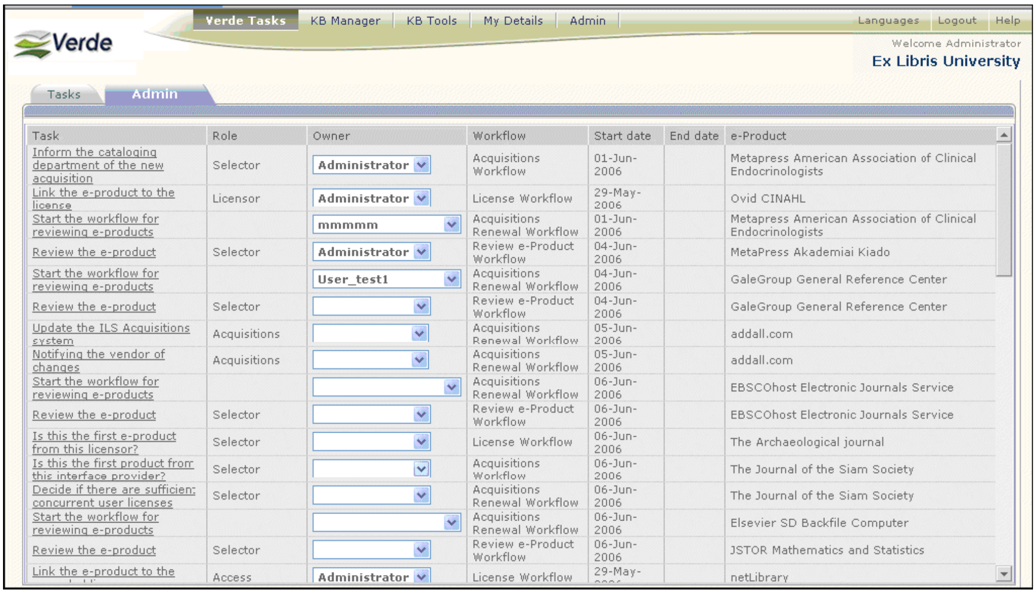


Figure 157: Verde Tasks – Admin Tab

NOTE:

If only one user is the owner of the task (because no other user has been assigned this role), the system automatically sets this user as the owner of the task. In this case, it is not possible to change the owner to another user.

The Admin tab displays the following information:

- the name of the task
- the role assigned to the task
- a drop-down list of potential owners – This is a list of all the users defined in the instance that have appropriate roles for performing the task and are therefore potential owners of the task. The administrator can assign the task to one of these users. The new owner will then receive an e-mail alert about the new task. When the user next logs in to Verde and opens the Verde Tasks module, this task will appear in the user's list of open tasks.
- the name of the workflow to which the task belongs
- the date on which the workflow began
- the date on which the workflow ended
- the name of the e-product related to the task

Part VI

Admin Module

Part VI contains the following:

- **Section 39: Introducing the Admin Module** on page **497**
- **Section 40: About the Users Tab** on page **499**
- **Section 41: The Code Tables Tab** on page **515**
- **Section 42: The Default Values Tab** on page **527**
- **Section 43: The Initial Tab** on page **529**
- **Section 44: The Profiles Tab** on page **547**
- **Section 45: The Configuration Tab** on page **553**

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Introducing the Admin Module

One of the fundamental aspects of Verde is that it allows libraries to create and manage their own workflows within the scope of the Verde ERM product.

Library workflows, particularly within the ERM area, are unique in that each library has its own set of routines and procedures. As a result, a workflow management system has been developed that is flexible enough to deal with many variations but, at the same time, is simple and straightforward enough to support as a single, non-customized product.

The Verde authorization system provides three managerial roles:

- Super user
- Administrator
- Staff user

A **super user** is a cross-instance administrator who can perform the following tasks:

- Manage all users
- Manage the code tables
- Create instances

An **administrator** is a staff user with administrative rights to the specific instance to which the staff user belongs. An administrator performs the following:

- Manages all users in this instance
- Translates labels in the code table
- Sets default values for new Verde entities and objects
- Initial administrative work, such as activating e-products from SFX
- Staff user's work
- Modifies the configuration of the Summary screen.
- Configures parameters for external applications with which Verde communicates, as well as the services used for this communication

A staff user is a staff member who carries out different Verde operations. Staff users can be assigned roles such as Selection Librarian or Acquisitions Librarian, and are linked to profiles that define their permissions within the Verde framework.

Super users and administrators perform their managerial tasks in Verde's Admin module, which they can access from Verde's top menu after logging in to the system with super-user or administrator credentials. Staff users, however, do not have access to, and cannot view, the Admin module.

The Admin Module section describes the actions that may be performed within the following Admin module tabs:

- **Users** – For information on this tab, see **About the Users Tab** on page **499**.
- **Code Tables** – For information on this tab, see **The Code Tables Tab** on page **497**.
- **Default Values** – For information on this tab, see **The Default Values Tab** on page **527**.
- **Initial** – For information on this tab, see **The Initial Tab** on page **497**.
- **Profiles** – For information on this tab, see **The Profiles Tab** on page **547**.
- **Configuration** – For information on this tab, see **The Configuration Tab** on page **497**.

40

The Users Tab

This section includes:

- **About the Users Tab** on page **499**
- **Creating a New User** on page **500**
- **Editing a User Record** on page **512**
- **Deleting a User** on page **513**

About the Users Tab

The **Users** tab in the Admin module displays a list of defined users.

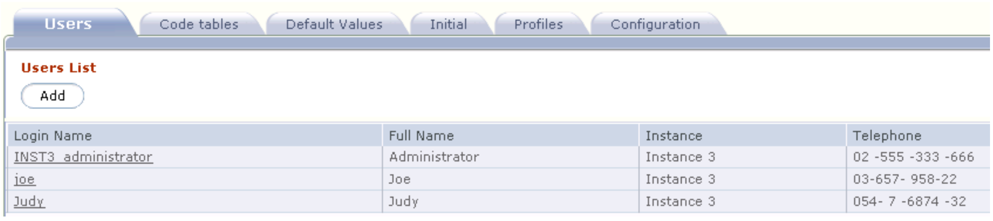

Figure 158: Users List

The Users List displays the following information for each user:

- Login Name
- Full Name
- Instance
- Telephone

Creating a New User

When you create a new user, you define the user's basic details, the profile(s) to be associated with the user, the user's role(s), and the user's privileges.

To create a new user:

1 In the **Users List**, click **Add**. The following screen is displayed.

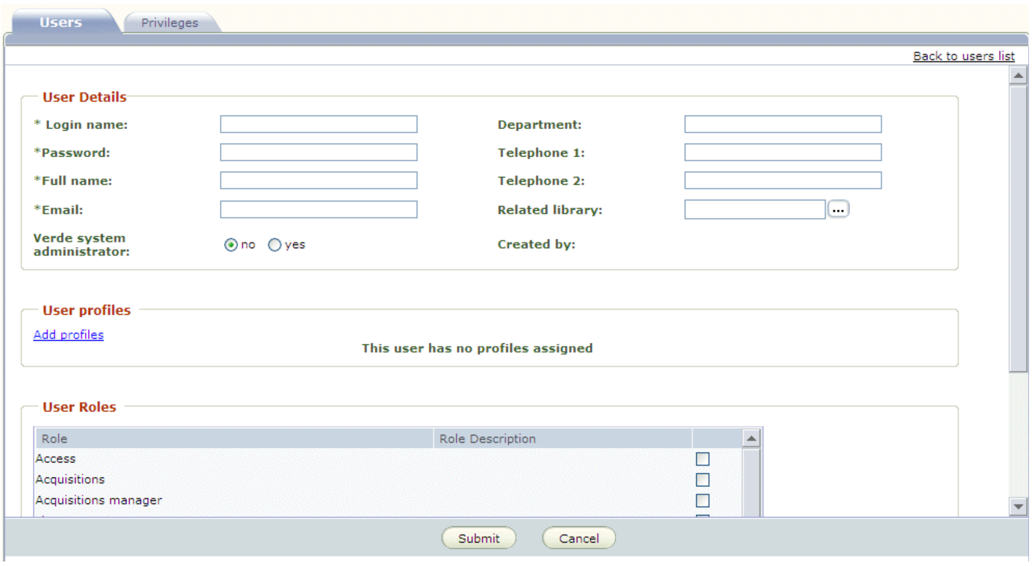

Figure 159: User Details

2 In the **User Details** section of the **Users** tab, complete the following fields:

Table 84. User Details

Field	Description
Login name (required)	The user name with which the user logs in to Verde. The login name must be unique and cannot be identical to an existing login name, even if the login name has been deleted. (This information is stored in the Verde database.)
Password (required)	The password with which the user logs in to Verde.
Full name (required)	The user's first and last names.
E-mail (required)	The user's e-mail address.

Table 84. User Details

Field	Description
Verde system administrator (Y/N)	Determines whether the user has administrator privileges. For information on managerial privileges, see **Introducing the Admin Module** on page **497**.
Department	The user's department within the organization.
Telephone 1 and 2	The telephone number(s) at which the user can be reached.
Related library	The name of the institute for which the user receives e-mail notification of workflow tasks (for e-products sponsored by the institute). If the field is empty, the user receives e-mails for all institutes. Note: Workflows and e-mail notifications must be configured for this functionality to work properly.

NOTE:

If one of the required fields is left blank and you click **Submit**, the system returns an error message. Initially, a Verde user is created by a Verde system administrator. After that, the Verde user may update his/her details listed in User Details in the My Details module (see **My Details** on page **487**).

3 In the **User Profiles** section of the **Users** tab, click **Add profiles**. The Select Profiles for User window opens, enabling you to select one or more (using the CTRL key) profiles from the **Profiles List** to associate with the user you are creating. If you are creating a staff user, the staff user you create will be able to perform only those functions enabled by the profile(s) with which

the user is associated. Note that there is no limit on the number of profiles that may be associated with a user.

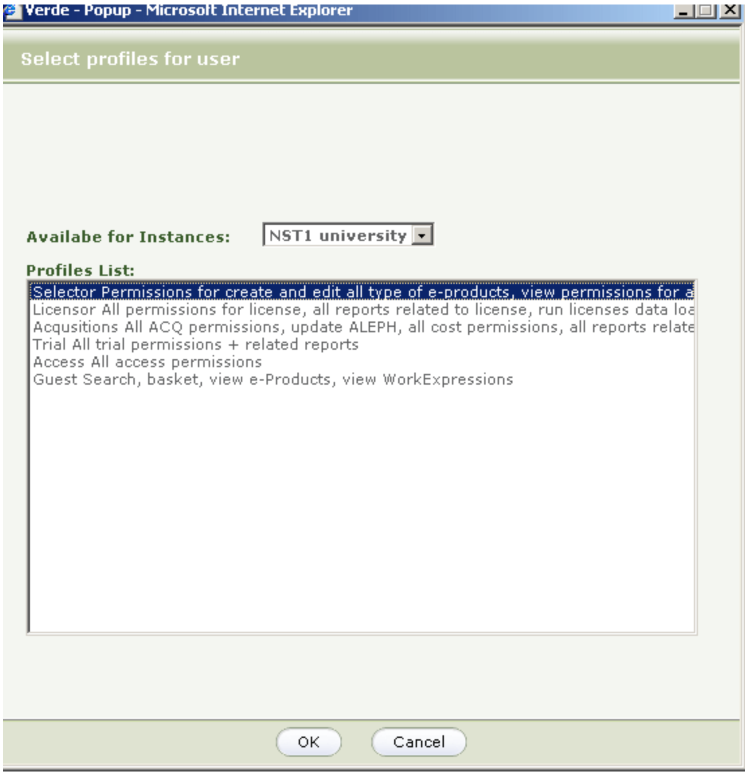

Figure 160: Selecting User Profiles

NOTE:
Profiles are defined in the Profiles tab of the Admin module. For details on this tab, see **The Profiles Tab** on page **547**.

Click **OK**. The profile(s) you selected are displayed under **User Profiles**.

4 In the **User Roles** section of the **Users** tab, select one or more of the following roles for the user you are creating:

- Access
- Acquisitions
- Acquisitions manager
- License manager
- Licensor
- Selector
- Administration
- Implementation

- Interoperability
- Legal
- Maintenance/updating
- Review/renewal
- Selection/trial/consideration

The user's role is a label or status that identifies the user as part of a functional group for alerts and searches within the library database, as well as tasks within workflows. Note that the user's role is associated with, but not directly tied to, the permissions assigned to the user (see the following step for details on defining these). To accommodate the large array of workflows in libraries, the role-to-permissions relationship is flexible. For example, a user can have the role of license negotiator, but not have the authority to approve a license.

5 Click the **Privileges** tab and select the **KB Manager** (for details, see **KB Manager Module Privileges** on page **504**) and **KB Tools** (for details, see **KB Tools Module Privileges** on page **510**) module permissions you want to assign the user you are creating. Note that if you are creating a staff user, the permissions defined for the profile(s) with which the user is associated are read-only and displayed in red.

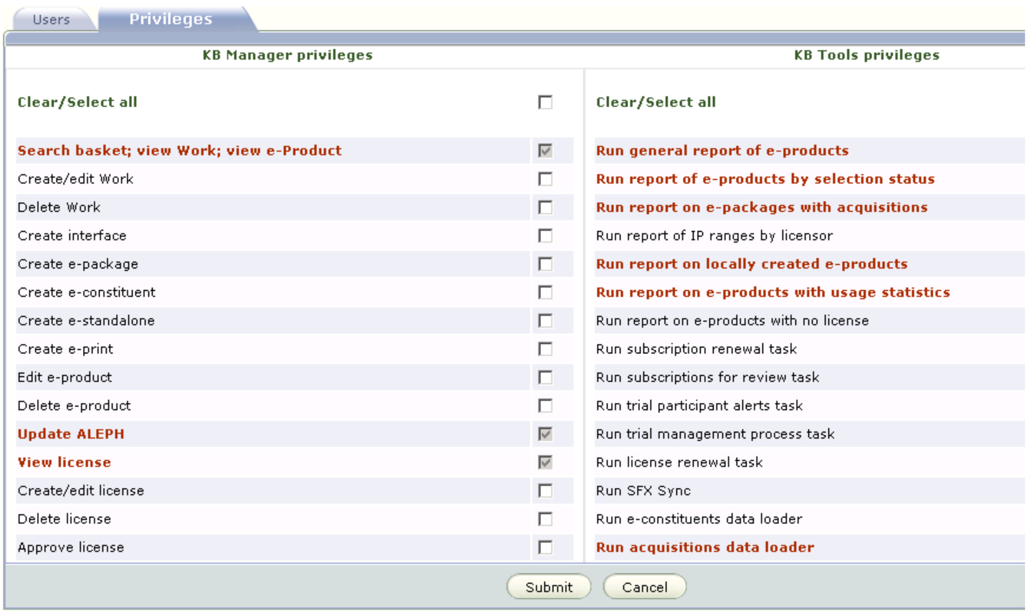

Figure 161: User Privileges

6 Click **Submit**. The user is created in the Verde database and displayed in the **Users List**.

KB Manager Module Privileges

In general, KB Manager module privileges include view, create/edit, and delete permissions for most attributes.

For example, the access attribute's KB Manager module privileges include the following:

- View access
- Create/edit access
- Delete access

The following table contains a detailed explanation of KB Manager module privileges.

Table 85. KB Manager Module Privileges

Attribute	Privilege	Description
Search	Search basket; view work; view e-Product	Allows the following actions: ■ Perform search ■ View e-product attributes (in the **General Information**, **Interoperability**, and **Libraries** tabs), ■ View work records ■ Add e-products to basket ■ View basket

Table 85. KB Manager Module Privileges

Attribute	Privilege	Description
Work	Create/edit work	Allows the following actions: ■ Create work records. For more information, see **Adding New Work Records** on page **44**. ■ Edit work records. For more information, see **Editing a Work Record** on page **46**. ■ Delete fields in locally created work records (except for two required fields, Title and e-Product Type) ■ Add local fields to already existing work records ■ Delete local fields in work records that are part of the KnowledgeBase
	Delete work	Allows deleting locally created work records. Users cannot delete work records that are part of the KnowledgeBase. A work record cannot be deleted if it has related e-products.

Table 85. KB Manager Module Privileges

<table>
<tr><th>Attribute</th><th>Privilege</th><th>Description</th></tr>
<tr><td rowspan="7">e-Product</td><td>Create e-interface</td><td rowspan="5">A user can create an e-product of each type only if the user has Edit e-product permissions.

An e-product must be connected to a work record.
■ For details on how to create appropriate work records, see Adding New Work Records on page 44.
■ For details on how to create an e-product, see Adding New e-Product Records on page 81.
■ e-Products of type e-standalone, e-package, and e-interface can also be created using the Quick Add wizard. For details, see The Quick Add Wizard on page 85.</td></tr>
<tr><td>Create e-package</td></tr>
<tr><td>Create e-constituent</td></tr>
<tr><td>Create e-standalone</td></tr>
<tr><td>Create e-print</td></tr>
<tr><td>Edit e-product</td><td>Allows editing e-product attributes (in the General Information, Interoperability and Libraries tabs).</td></tr>
<tr><td>Delete e-product</td><td>Allows deleting locally created e-products.

e-Products cannot be deleted if they are part of the KnowledgeBase. Locally created e-products cannot be deleted if they have attributes.

In a consortium environment, locally-created e products are automatically propagated to other instances. These e products can be deleted only if they can be deleted in all instances (if they have no associated attributes, e-product statuses, or selection statuses in any instances).</td></tr>
</table>

Table 85. KB Manager Module Privileges

Attribute	Privilege	Description
Acquisitions	Update Aleph	Allows opening a new order in Aleph and canceling the current Aleph order. This permission is available only if your Verde instance is configured correctly to communicate with the Aleph instance.
	View acquisitions	Allows viewing acquisitions.
	Create/edit acquisitions	Allows creating, editing, and linking acquisitions.
	Delete acquisitions	Allows deleting and unlinking of acquisitions. An acquisition record cannot be deleted if: ■ The acquisition status is **Approved**, **Active**, **Cancelled**, **Renewed**, or **Send for additional processing**. ■ The acquisition record has local acquisition and/or invoice records attached to it. ■ The acquisition record is related to a workflow.
	Activate acquisitions	Allows assigning the status **Active** to acquisitions.
	Renew acquisitions	Allows renewing acquisitions. Note: Only acquisitions with the status **Active** can be renewed.
	View local acquisitions	Allows viewing local acquisitions.
	Create/edit local acquisitions	Allows creating and editing local acquisitions.
	Delete local acquisitions	Allows deleting local acquisitions.
	View invoice	Allows viewing invoices.

Table 85. KB Manager Module Privileges

Attribute	Privilege	Description
	Creat/edit invoice	Allows creating and editing invoices.
	Delete invoice	Allows deleting invoices. **Note:** Invoices with the status **Paid** cannot be deleted.
License	View license	Allows viewing licenses.
	Create/edit license	Allows creating, editing, duplicating, linking, and pasting licenses, as well as adding prevailing terms.
	Delete license	Allows deleting and unlinking of licenses. A license record cannot be deleted if: ■ The license status is **Approved** or **Retired**. ■ The license record is related to workflow.
	Approve license	Allows assigning the status **Approved** to a license.
	Extend license	Allows renewing licenses. Note: Only licenses with the status **Approved** can be renewed.
	View license attachment	Allows a user to view a license attachment if the user has **View license** permissions.
	Add license attachment	Allows a user to add a license attachment if the user has **Create/edit license** permissions.
	Delete license attachment	Allows a user to delete a license attachment if the user has **Create/edit license** permissions.

Table 85. KB Manager Module Privileges

Attribute	Privilege	Description
Access	View access	Allows viewing access records.
	Create/edit access	Allows creating, editing, duplicating, and pasting access records.
	Delete access	Allows deleting access records.
	View access authorization	Allows viewing access authorization records.
	Create/edit access authorization	Allows creating and editing access authorization records.
Admin	View admin	Allows viewing admin records.
	Create/edit admin	Allows creating, editing, pasting, and duplicating admin records.
	Delete admin	Allows deleting admin records.
	View breach	Allows viewing breach records.
	Create/edit breach	Allows creating, editing, and duplicating breach records.
	Delete breach	Allows deleting breach records.
	View incident	Allows viewing incidents.
	Create/edit incident	Allows creating, editing, and duplicating incident record
	Delete incident	Allows deleting incidents.
Trial	View trial	Allows viewing trial records.
	Create/edit trial	Allows creating and editing trial records.
	Delete trial	Allows deleting trial records. **Note:** Only trial records with the status **Requested** or **On hold** can be deleted.
Cost	View cost	Allows viewing cost records.
	Create/edit cost	Allows creating, editing, and duplicating cost records.
	Delete cost	Allows deleting cost records.

Table 85. KB Manager Module Privileges

Attribute	Privilege	Description
Usage	View usage	Allows viewing usage records.
	Create/edit usage	Allows creating, editing, and duplicating usage records.
	Delete usage	Allows deleting usage records.
Workflow	Handle a workflow	Allows handling a workflow.
	Start a workflow	Allows starting license and acquisition workflows.
	Cancel a workflow	Allows canceling a workflow.
Library	View library	Allows viewing library, library contact, IP range, and proxy server records.
	Create/edit library	Allows creating and editing library, library contact, IP range, and proxy server records. Also allows deleting of library contact, IP range, and proxy server records.
	Delete library	Allows deleting library, library contact, IP range, and proxy server records. Note: A library that is being used in the environment (for example, the library is selected as a sponsoring library for a certain e-product) cannot be deleted.
Organization	View organization	Allows viewing organizations and organization contacts.
	Create/edit organization	Allows creating and editing organization and organization contact records. Also allows deleting organization contacts.

KB Tools Module Privileges

The KB Tools module privileges include a list of Verde reports, tasks, and loaders. For most of these, there is a separate **Run** permission that allows running a job and viewing the job output. For example, a user with **Run general**

report permissions can run a general report and view its results in **KB Tools > View Report Output**.

The following table contains an explanation of KB Tools module privileges.

Table 86. KB Tools Module Privileges

Privilege	Description
Run report	Allows running a report and viewing the report output.
Run task	Allows running a task and viewing the task output.
Run loader	Allows running a loader and viewing the loader output.
Run SFX synch	Allows running the synchronization process in two modules: KB Tools and KB Manager. The synchronization process for an individual e-product may be triggered by clicking on the **Synch with SFX** button in the KB Manager module. The batch synchronization process that handles all e-products that require synchronization is available from the KB Tools module. For details on the synchronization process, see **Performing Synchronization** on page **624**.
Run Transfer Local Data	Allows transferring local data using the Transfer Local Data screen. A user who does not have this privilege can view this screen, but not the **Transfer Data** and **Select Match** buttons. For more information, see **Transferring Local Data** on page **471**.
Run LKB update reports	Allows viewing results of the Verde task that updates the local KnowledgeBase. For more information, see **Viewing KB Reports** on page **483**.
Handle scheduled tasks/reports	Allows viewing, editing, and deleting reports and tasks that have been scheduled.

Editing a User Record

You can edit existing user records.

To edit an existing user record:

1 In the **Users List**, click the user's login name.

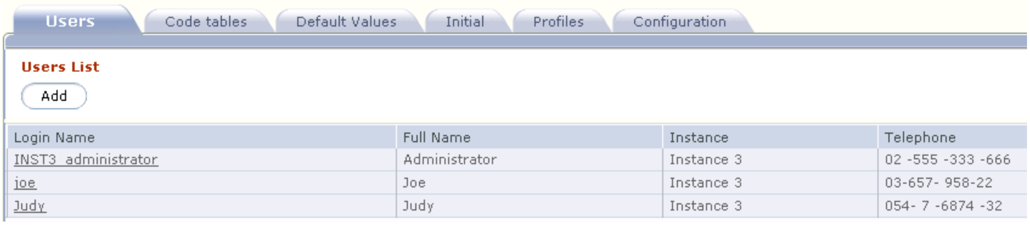

Figure 162: Users List

The following screen is displayed.

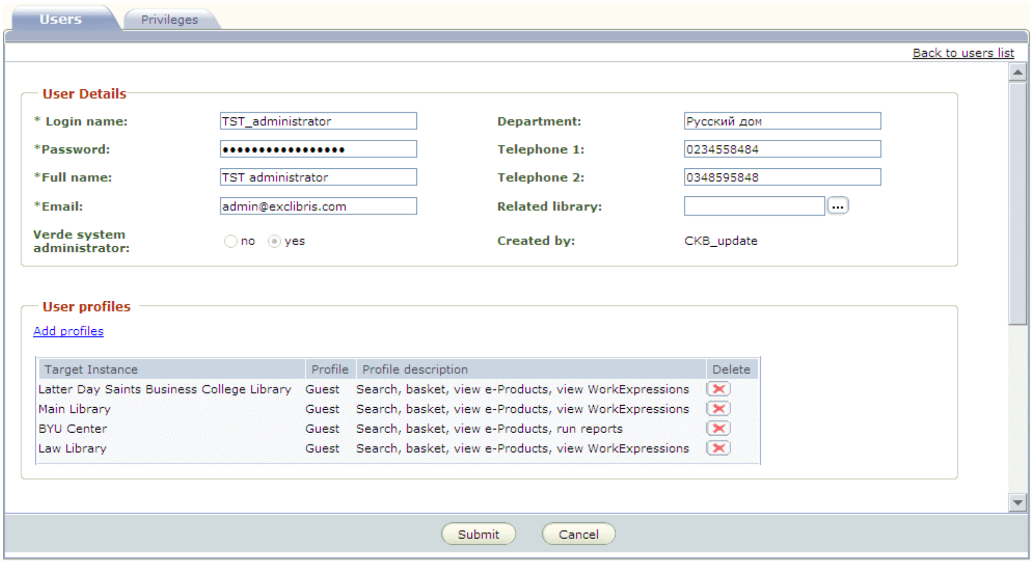

Figure 163: User Details

2 Edit the user's properties as required. For details, see **Creating a New User** on page **500**.

3 Click **Submit**. Your modifications are saved in the Verde database.

Deleting a User

You can remove a user from both the Users List and Verde database.

To delete a user:

1 In the **Users List**, click the user's login name.

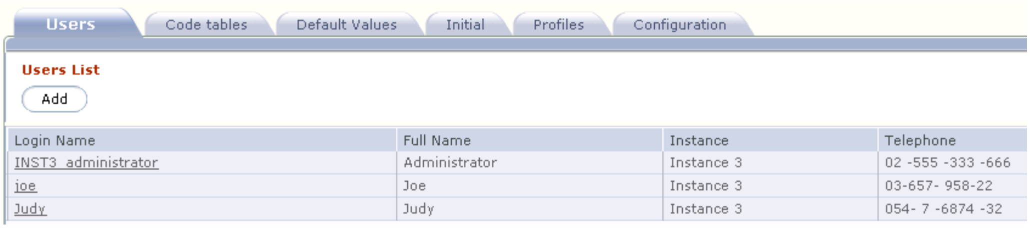

Figure 164: Users List

2 In the screen that opens, click the **Delete** button that appears in the top right corner.

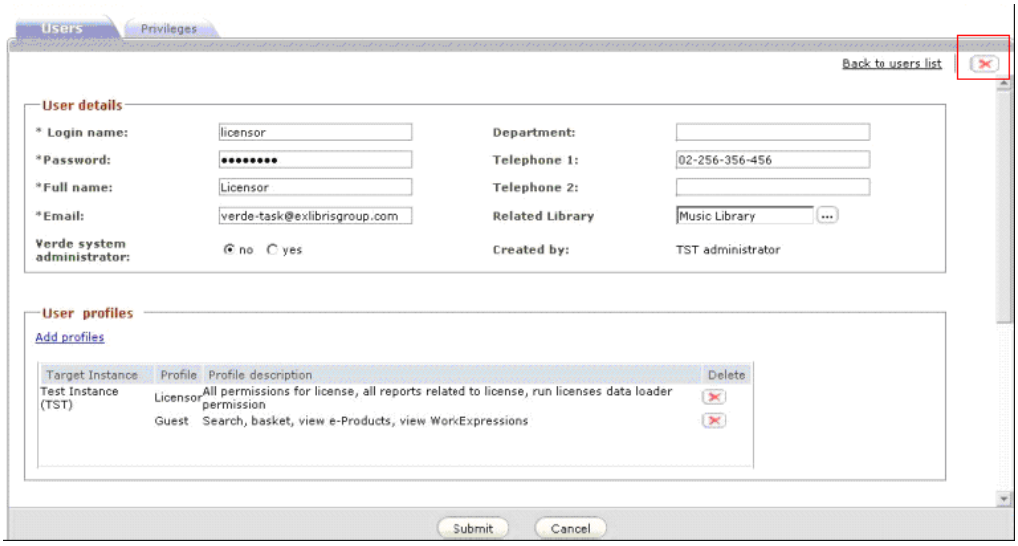

Figure 165: Delete User

3 Click **Yes** to confirm deletion. The user is deleted from the Users List and from the Verde database.

NOTE:

Instance administrators (created during installation, with the instancename_administrator naming convention) cannot be deleted.

41

The Code Tables Tab

This section includes:

- **About the Code Tables Tab** on page **515**
- **Updating a Code Table** on page **516**

About the Code Tables Tab

The **Code Tables** tab in the Admin module offers libraries the option of localizing the various code tables of a Verde instance. Using this tab, the names of fields can be changed to reflect local practices and terminology.

The following tables can be localized:

- Cost
- Organization
- Access
- Breach
- Transfer
- Verde Task
- Privileges
- e-Product
- Usage
- Work
- Local use terms
- Acquisition
- License
- Incident

- Admin
- Trial

Updating a Code Table

You use the Code Tables tab to localize the code tables for your Verde instance.

To update a code table:

1 In the Admin module's **Code Tables** tab, select the topic whose table you want to modify.

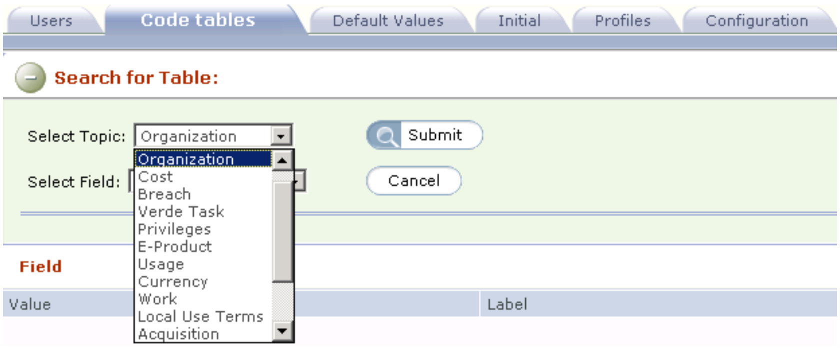

Figure 166: Code Tables

2 From the **Select Field** box, select the specific field within the table that you want to modify. For example, if you selected the **Cost** table in step 1, you can choose to modify the **Amount** or **Type** field.

3 Click **Submit** in the **Search for Table** section. The selected field's values and default names (labels) are displayed. A **Note** column, in which you can record notes applicable to each field value, is also displayed.

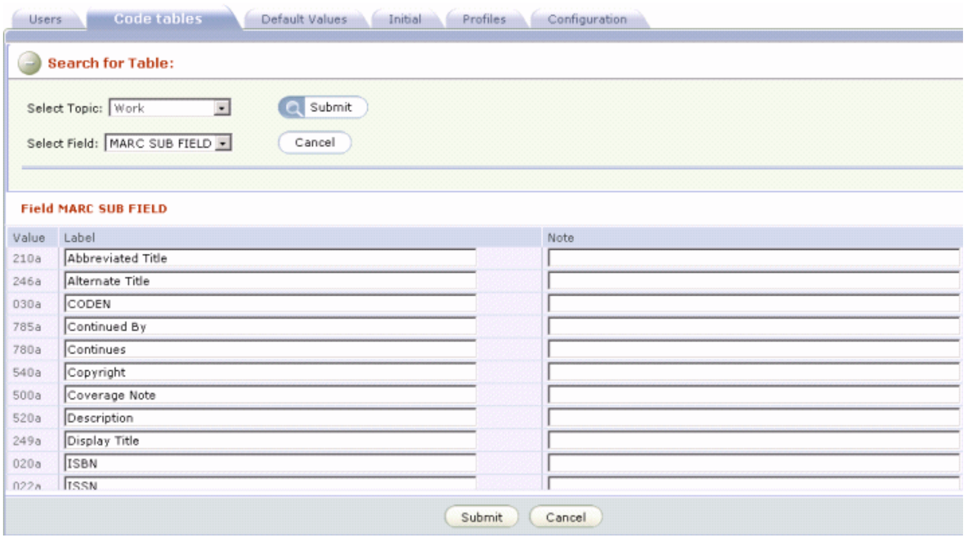

Figure 167: Field's Values and Default Names

4 Enter changes to each field value as required.

NOTE:
Values can only be modified, not deleted.

5 Click **Submit** to save your changes. The following message is displayed.

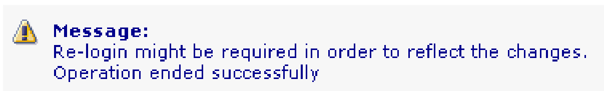

Figure 168: Code Table Message

NOTE:
If a change is made to an indexed field in a site that has local data, indexes should be rerun so that they contain the new labels. The following fields are indexed: **e-Product status**, **e-Product selection status**, **e-Product package type**, **e-Product type**, **Acquisition status**, **Trial status**, and **License status**.

Updating Functional Fields

Certain fields have functional aspects to them. When you change the related labels of such fields, you must ensure that the new labels match the functionality of these fields. The following tables include functional fields: **e-Product**, **License**, **Acquisition**, **Trial**, **Privileges**, **Verde Task**, and **Organization**.

Details of the functional fields in each of these tables are listed in the following sections.

NOTE:
For information about work and e-product record indexes, see **Indexing** on page **613**.

e-Product

Table 87. e-Product Table Functional Fields

Field	Values	Notes
Activity status	■ Down ■ Up	Changing the activity status triggers the **Availability** task. This task updates the availability status of the parallel SFX item. For more information, see **Verde-SFX Interoperability** on page **606**.
e-Product status	■ Null ■ Implementation 1 ■ Implementation 2 ■ Implementation 3 ■ Trial ■ Production ■ Withdrawn	Assigning an e-product status makes the e-product active or inactive, according to the e-product status as well as the activation start and end dates. Activation and deactivation typically occur after the evaluation process is run. For information about e-product activation, see **Activation** on page **111**. For information about e-product deactivation, see **Rejection** on page **110**. Activation and deactivation of e-products triggers the synchronization process that updates the parallel SFX item. For more information, see **Synchronizing e-Product Updates with SFX** on page **613**.

Table 87. e-Product Table Functional Fields

Field	Values	Notes
Operation	■ Summary ■ e-Product ■ Acquisition ■ License ■ Access ■ Admin ■ Trial ■ Cost ■ Usage ■ Workflow ■ Sync History	These are e-product attribute labels. For more information about e-product attributes, see the following sections: ■ **e-Product Summary Tab** on page **59** ■ **Acquisition Records** on page **119** ■ **License Records** on page **139**. ■ **Access Records** on page **155** ■ **Admin Records** on page **167** ■ **Trial Records** on page **181** ■ **Cost Records** on page **189** ■ **Usage Records** on page **193** ■ **Workflows** on page **199** ■ **Monitoring Synchronization History** on page **632**
Selection status	■ Null ■ Approved ■ Evaluation ■ Final Approval ■ Rejected ■ Withdrawn by publisher ■ Review ■	The selection statuses are used in Verde workflows pertaining to e-product records. For more information about selection workflows, see **Selection Processes** on page **107**. For more information about the Verde workflow engine, see **About Verde Workflows** on page **199**. Selection processes involve online and batch updates as well as Verde reports. The processes rely on relationships between e product records as well as between e product and acquisition records. The selection process is closely related to acquisition workflows. For more information about acquisition workflows, see **Acquisition Processes** on page **134**.

Table 87. e-Product Table Functional Fields

Field	Values	Notes
Tier	■ Managed for all ■ Managed for some ■ Managed locally	The tier level is relevant only if you are working in a shared consortium environment. Resources in a shared consortium environment fall into one of two categories: managed centrally or managed locally. Resources that are managed centrally are activated in the center for one or more member instances. Resources that are managed locally are activated, acquired, and licensed by the member instance in the member instance. For more information, see **Working in a Shared Consortium Environment** on page 565.
Update target	■ ILS ■ MetaLib ■ Null ■ SFX ■ SFX and MetaLib	Indicates the system for update. The current functionality is related to the Verde-SFX synchronization process. If the value of the **Update target** field is **SFX**, the parallel SFX item is updated with the value of the Verde e-product. If the value of the **Update target** field is not **SFX**, the information is not sent to SFX.

Table 87. e-Product Table Functional Fields

Field	Values	Notes
e-Package type	■ Aggregator ■ Selective	These are two types of packages: ■ **Aggregator packages** are inclusive. By default, all related e-constituents are automatically included when an aggregator package is selected in Verde and acquisitions and licensing are always performed at the level of the package. However, you can define one or more e-constituents related to an aggregator package as independent. Independent e-constituents do not inherit e-product status, selection status, and activation dates from the parent aggregator package and are essentially like e-constituents in selective packages. ■ **Selective packages** are those containing multiple e-constituents. The library can select either all the e-resources in the package or individual e-resources that are part of the package.

License

Table 88. License Table Functional Fields

Field	Values	Notes
License status	- Approved - Approved locally - Awaiting local signature - Electronic version created - Final legal version received - Awaiting vendor generic license - In negotiation - Pending licensor response - Pending local response - Pending final local signature - Under local review - New - Redacted version created - Rejected - Retired - Pending final signature by licensor - Under review	The **License status** is a mandatory field. Once a license has been assigned a status of **Approved** or **Retired**, it cannot be deleted. Only licenses with the status **Approved** are handled by the **License Renewal** Task. The license's status plays a significant role in the license workflow. For more information, see **License Records** on page **139**.
License type	- Prevailing - Regular - Supplemental - Trial	The default license type is **Regular**. A license with the type **Trial** is created automatically by the system during a trial process when the **License required** check box is selected in the license record. A prevailing term record must be defined when there is more than one active license.

Table 88. License Table Functional Fields

Field	Values	Notes
Renewal type	■ Automatic ■ Explicit ■ Perpetual	The **License Renewal** task renews licenses that are about to expire whose renewal type is defined as **Automatic**. For more information see **License Processes** on page **153**.

Acquisition

Table 89. Acquisition Table Functional Fields

Field	Values	Notes
Payment status	■ Paid ■ Ready to be paid ■ Unpaid	The invoice payment status. The default status is **Paid**. Invoices with the status **Paid** cannot be deleted.
Status	■ Active ■ Approved ■ Cancelled ■ Denied ■ New ■ On hold ■ In process 1 ■ In process 2 ■ Ready to be approved ■ Renewed ■ Review ■ Sent for additional processing	The **Status** field is a mandatory field whose default is **New**. The field plays a significant role in Verde workflows. Once an acquisition has been assigned a status of **Active**, **Approved**, **Renewed**, or **Cancelled**, it cannot be deleted. Assigning the status **Review** initiates the **Review e-Product** workflow. The status may be assigned manually or by the **Subscriptions for Review** task. For more information, see **Review e-Product and Renew Acquisitions Workflows** on page **219**. The **Subscriptions for Review** task handles acquisitions with the statuses **Active** and **Renewed** if **Auto renewal** is set to **No** in the acquisition record. The **Subscription Renewal** task handles acquisitions with the statuses **Active**, **Renewed**, and **Review** if **Auto renewal** is set to **Yes** in the acquisition record.

Trial

Table 90. Trial Table Functional Fields

Field	Values	Notes
Trial decision status	■ Null ■ Purchase ■ Do not purchase ■ Deferred	The **Trial decision status** field is a mandatory field that causes an update to the e-product's selection status, as follows: ■ If the value of this field is **Purchase**, the selection status of the e-product is updated to **Approved**. ■ If the value of this field is **Do not purchase**, the selection status of the e-product is updated to **Rejected**. ■ If the value of this field is **Deferred**, the selection status of the e-product is not updated. Trial participants are alerted to the decision status. Note that the decision status can be changed before the trial has been completed.
Trial status	■ Requested ■ Approved ■ On trial ■ On hold ■ Trial over	The **Trial status** is a mandatory field that may be updated either manually or by the **Trial Management** task. The task updates the trial's status according to trial's start and end dates, as follows: ■ From the status **Approved** to the status **On hold** or **On trial** when the start date is reached. ■ From the status **On trial** to the status **Trial over** when the end date is reached. All other changes should be performed manually. For more information about trial participant alerts, see **Trial Process** on page 186.

Privileges

Table 91. Privileges Table Functional Fields

Field	Values	Notes
Permission	KB Tools and KB Manager permissions	Verde permissions allow performing certain actions in the KB Manager and KB Tools modules. For details see **KB Manager Module Privileges** on page **504** and **KB Tools Module Privileges** on page **510**.
Profile	Default profile names: ■ Access ■ Acquisitions ■ Guest ■ Licensor ■ Selector ■ Trial	Profile definitions include specific, granular authorizations or permissions, as well as restrictions. A staff user associated with a particular profile is able to activate only those functions allowed by this profile. For more information see **The Profiles Tab** on page **547**.
Role	■ Access ■ Acquisitions ■ Acquisitions manager ■ Administration ■ Implementation ■ Interoperability ■ Legal ■ License manager ■ Licensor ■ Maintenance/updating ■ Review/renewal ■ Selector ■ Selection/trial/consideration	Users are assigned one or more roles. A role is defined for each task in a workflow. A user that has the appropriate role becomes the potential owner of a task. If only one user has been assigned this role, all tasks with this role will automatically be assigned to this user. Users can view only the tasks linked to their roles in the Verde Tasks module.

Verde Task

Table 92. Verde Task Table Functional Fields

Field	Values	Notes
Verde task name	Report, task, and loader names	There is a list of reports, tasks, and loaders. For more information on these, see **Introducing the KB Tools Module** on page **245**.

Organization

Table 93. Organization Table Functional Fields

Field	Values	Notes
Role	Instance Institute Licensing agent Consortial member Consortium Interface provider Licensee Licensor Vendor	There are three main entities in Verde: **e-product**, **library** and **organization**. This table includes roles for libraries and organizations. **Instance** and **Institute** are library (institution) roles. A single instance can support one or more libraries. All libraries within one instance share the e-products and the key e-product attributes, such as acquisitions, license, trial, access, and admin. The local acquisition, cost, and usage records can be created at the library level. In addition, it is possible to record resource access authorization information at the library level (that is, whether or not the library may access specific resources). All other roles in the list are organization roles. The role determines the organization's relationship to an e-product. For example, the organization type **Interface provider** can be associated with an e-interface. Each organization can have multiple roles.

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The Default Values Tab

This section includes:

- **About the Default Values Tab** on page **527**
- **Defining Default Values for a License Record** on page **527**

About the Default Values Tab

The **Default Values** tab in the Admin module enables you to define default values for certain e-product attribute record fields. This helps increase the efficiency with which library staff can input data.

Defining Default Values for a License Record

You can define default values of an instance for certain license record fields. For information about default license per user, see **Save Default** on page **67**.

To define default values for a license record:

1 In the Admin module, click the **Default Values** tab. The license record **Description** and **Terms** tabs display only the fields for which default values can be defined.

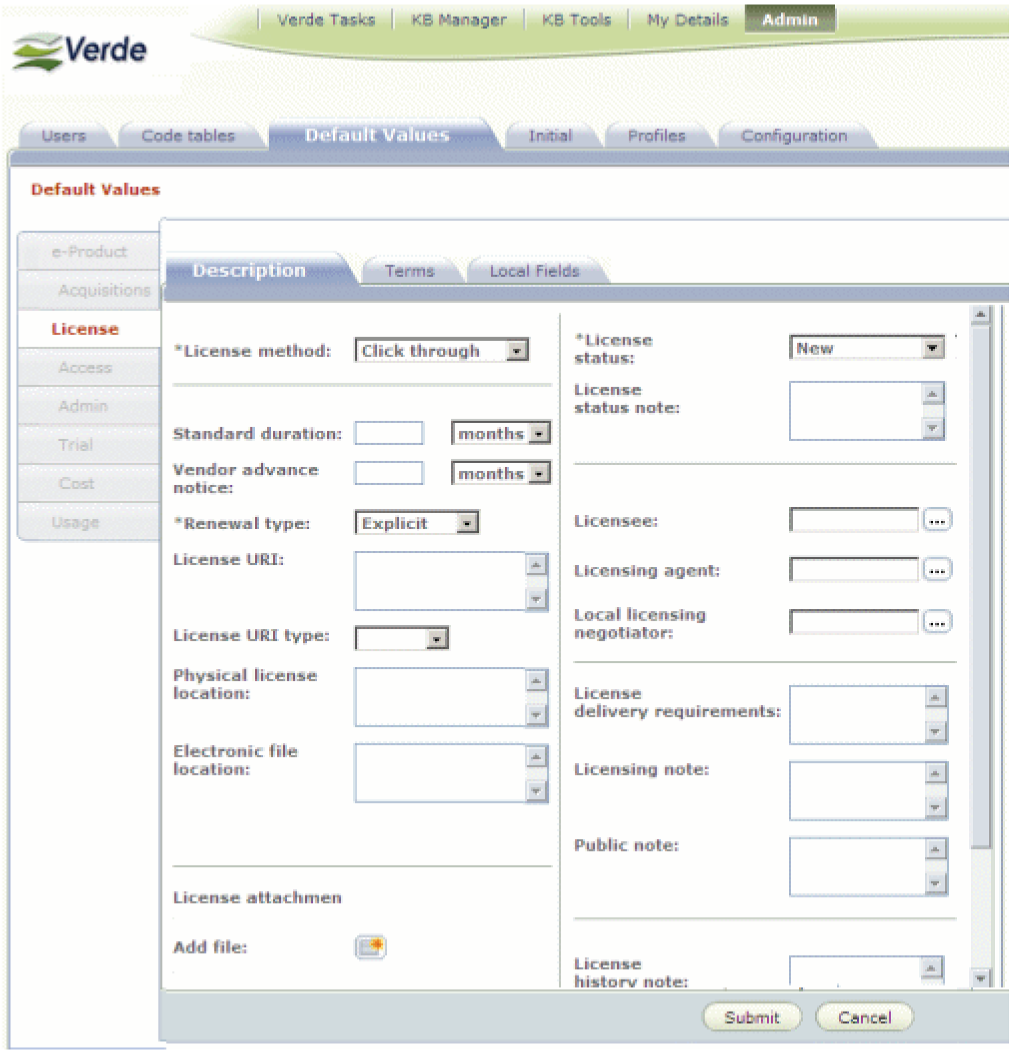

Figure 169: Default Values

2 Define default values for the displayed fields. For an explanation of each of these fields, see **License Record Tabs** on page **145**.

3 Click **Submit**. A staff user can now view the default values you defined when creating a new license record in the KB Manager module.

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The Initial Tab

This section includes:

- **About the Initial Tab** on page **529**
- **Converting Acquisitions** on page **529**
- **Loading Acquisitions** on page **530**
- **Localizing Records** on page **533**

About the Initial Tab

The **Initial** tab in the Admin module enables you to perform certain actions during the initial, setup phase of a Verde installation.

The following options are available in this tab and described in this section:

- Convert acquisitions
- Load acquisitions
- Localization

NOTE:
The conversion and loading of acquisitions are supported only for customers that manage their acquisitions in Aleph. The conversion and loading of acquisition and vendor records from Aleph to Verde is described in detail in the *Verde-Aleph Interoperability Guide*.

Converting Acquisitions

The acquisition conversion process enables you to take an input file from Aleph and convert it to a format that can be loaded into the Verde database.

To convert an acquisition:

1 Transfer the Aleph XML export file of an acquisition record to the following location on the Verde server:

`$VERDE_BASE/home/data/import/`

2 In the Admin module's **Initial** tab, click **Convert Acquisitions**. The process assumes that there is a file to be converted in the `..data/import` directory.

3 Click **Submit** to convert the acquisition record. When the conversion process is completed, the following files are created:

- `$VERDE_BASE/home/data/import/acqToStandard.xml`
- `$VERDE_BASE/home/data/import/acqRejectedNumbers.xml` – This file includes the following information for each rejected record: the number of records in the input file, the identifier, the title, the e-product type, the acquisition number, and the order number.

NOTE:
You can monitor the conversion process by viewing the `$VERDE_BASE/home/system/log/acqConvert.log` log file.

Loading Acquisitions

After the Aleph input file has been converted, it can be loaded into the Verde database using one of the following acquisition loading options:

- **Load acquisition data that is in XML format** – The XML format is usually the result of exporting acquisition data from Aleph and converting it to XML format as described in **Converting Acquisitions** on page **529**. However, any input file that is in the required XML format (see **Acquisition Input File Structure** on page **532**) can be loaded into the Verde database using the batch process described below.
- **Load acquisition data that is in a tab-delimited file** – Tab-delimited files can be loaded from the KB Tools module. For details, see **Overview of Loaders** on page **315**.

NOTE:

Make sure that Aleph sub-libraries are defined as libraries in Verde. Codes identical to those in Aleph must be used. During acquisition loading, the system checks whether the Aleph and Verde codes match. If a library code that appears in the **<Organization>** field in the `acqToStandard.xml` file does not exist as Verde, the acquisition record is rejected.

To load acquisitions that are in XML format:

1. In the Admin module's **Initial** tab, click **Load Acquisitions**. The process assumes that there is an `acqToStandard.xml` file in the `..data/import` directory.
2. Click **Submit** to run the batch process and load the file into the Verde database.

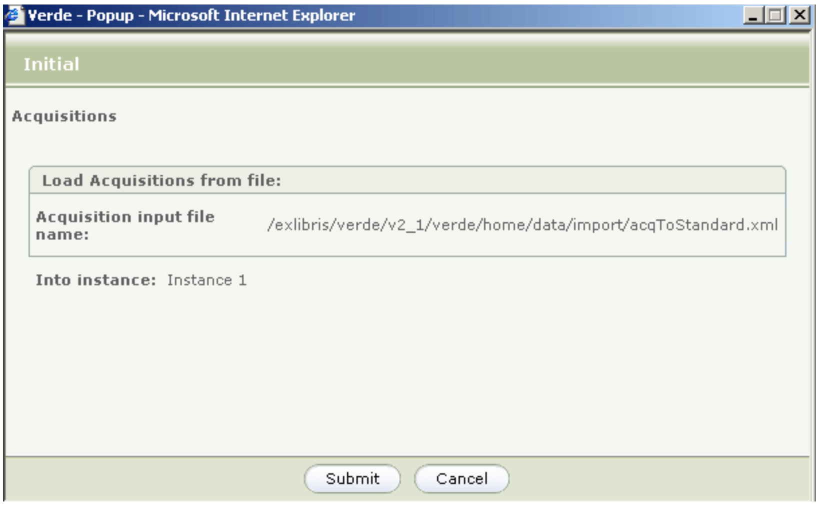

Figure 170: Load Acquisitions

NOTE:

You can monitor the load process by viewing the `$VERDE_BASE/home/system/log/acqLoad.log` log file.

Acquisition Input File Structure

The acquisition input file must be in the following XML format:

```
<Acquisitions>
<Acquisition>
<WorkExpressionData>
<Isbn></Isbn>
<Issn></Issn>
<EIssn></EIssn>
<Title></Title>
</WorkExpressionData>
<EProductAndSubscriptionPeriodData>
<EProductType></EProductType>
<HoldingsData></HoldingsData>
<ILSProductId></ILSProductId>
<ILSHoldingsIds></ILSHoldingsIds>
<SubscriptionStartDate></SubscriptionStartDate>
</EProductAndSubscriptionPeriodData>
<AcquisitionData>
<AcquisitionNumber></AcquisitionNumber>
<OrderNumber></OrderNumber>
<OrderDate></OrderDate>
<StartDate></StartDate>
<EndDate></EndDate>
<RenewCancelDate></RenewCancelDate>
<OrderForm></OrderForm>
<OrderSendMethod></OrderSendMethod>
<MethodOfAcquisition></MethodOfAcquisition>
<MaterialType></MaterialType>
<Organization></Organization>
<NoCopies></NoCopies>
<Price></Price>
<DiscountOnPrice></DiscountOnPrice>
<VendorId></VendorId>
<VendorCode></VendorCode>
<VendorNote></VendorNote>
<ILSSubscriptionId></ILSSubscriptionId>
<ILSNote></ILSNote>
<Budgets></Budgets>
<Status></Status>
<StatusDate></StatusDate>
</AcquisitionData>
</Acquisition>
</Acquisitions>
```

Localizing Records

The quickest way to reflect your library's holdings in Verde is to run localization. Localization is a Verde batch process that uses an extract from the SFX database as its input.

If you are a new Verde user, you will be requested to create an SFX extract and transfer it to your Ex Libris representative. Ex Libris will run the first Verde KnowledgeBase localization for you. Advanced Verde users will typically run localization independently.

This section describes:

- **Preparing Localization** on page **533**
- **Running Localization** on page **537**
- **Localization Workflow** on page **539**
- **Monitoring Localization** on page **542**
- **Troubleshooting Errors** on page **543**

Preparing Localization

Ensure that you perform the following steps before running localization:

1. Verify that Verde and SFX are updated to the same KB level – for details, see page 533.
2. Define SFX institutes – for details, see page 534.
3. Create a localization file – for details, see page 534.
4. Create an auto-activate file (optional) – for details, see page 535.
5. Run the localization cleanup process (optional) – for details, see page 536.

Verifying that Verde and SFX Are Updated to the Same KB Level

The localization will work best if the Verde and SFX KnowledgeBase update levels match.

To verify that Verde and SFX are updated to the same KB level:

- Verify the Verde KB update level by clicking the Verde logo in the top left corner of the Verde screen.
- Verify the SFX update level by reviewing the following file on the SFX server: `/exlibris/sfx_ver/sfx_version_3/.sfx_history`

Defining SFX Institutes

If your SFX installation contains institute definitions, the full set of libraries that are parallel to your SFX institutes must be defined in Verde before localization is run. Ensure that you create a link between each Verde library and its corresponding SFX institute (if one exists).

For example, if your SFX instance has an institute named **Brock**, create a Verde library representing this SFX institute, and enter the SFX institute code in the Verde library's **SFX Institute code** field.

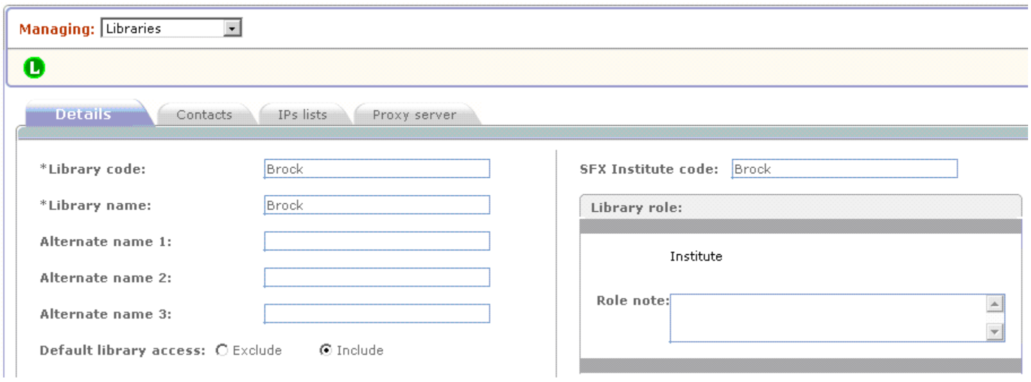

Figure 171: Defining the SFX Institute Code

Creating a File for Localization

For instructions on creating an SFX extract, refer to the *Verde-SFX Interoperability Setup Guide*. The following is an example of one record from an exported file:

```
<record>
 <leader>-----nas-a22-----z--4500</leader>
 <controlfield tag="008">081110uuuuuuuuuxx-uu-|------u|----|eng-d</controlfield>
 <datafield tag="245" ind1="" ind2="4">
  <subfield code="a">The publishers weekly</subfield>
 </datafield>
 <datafield tag="210" ind1="" ind2="">
  <subfield code="a">PUBLISHERS WEEKLY</subfield>
 </datafield>
 <datafield tag="260" ind1="" ind2="">
  <subfield code="b">Reed Business Information</subfield>
 </datafield>
 <datafield tag="022" ind1="" ind2="">
  <subfield code="a">0000-0019</subfield>
 </datafield>
 <datafield tag="090" ind1="" ind2="">
  <subfield code="a">954921332001</subfield>
 </datafield>
 <datafield tag="866" ind1="" ind2="">
  <subfield code="a">Available from 1994. </subfield>
  <subfield code="i">Institution 1</subfield>
  <subfield code="s">11122037301464002</subfield>
  <subfield code="t">111037301464000</subfield>
  <subfield code="x">Factiva:Full Text</subfield>
  <subfield code="z">11221037302894000</subfield>
 </datafield>
</record>
```

Figure 172: Extract from an Exported File

The exported file provides information about active object portfolios. The following information is included:

- Object data – matches Verde work expressions:
  - Brief bibliographic data (245, 210, 260,022, and so forth) matches the relevant fields in the Verde work expressions
  - 090 – Object internal ID that matches the Verde SFX ID of the Verde work expression
- Object portfolio data – matches the Verde e-constituent or e-standalone:
  - 866 "b" – the local threshold that matches the Verde local coverage and embargo
  - 866 "i" – the name of a single SFX institute for which the object portfolio is active, or **Default**. In the case of the former, localization activates the related Verde e-product libraries. If **Default** is defined, all Verde libraries are activated for the related e-product.
  - 866 "j" – the name of the SFX institute for which the object portfolio is not active. This can include one or more institute names separated by a comma. This is present only if 866 "i" is defined as **Default**. Localization activates the related e-product libraries.
  - 866 "z" – the SFX object portfolio internal ID that matches the Verde SFX ID of the e-constituent or e-standalone.
- Target and target service data – matches the Verde e-package:
  - 866 "s" – the SFX target service internal ID that matches the Verde SFX ID of the e-package
  - 866 "t" – the SFX target internal ID that matches the Verde pa_sfxid2 of the e-package. The value is not displayed in the GUI.
  - 866 "x" – the name of the SFX target used as the work record title for locally created e-package and e-interface records.

NOTE: If the localization input file is larger than 80Mb, we recommend to split the input into smaller chunks and run the localization for each part separately.

Creating an Auto-Activate File (Optional)

To create an auto-activate file, you must run the auto-activate script on your SFX server. For more information, refer to section 4.14 in the *SFX System Administrator's Guide*.

The auto-activate file provides auto-activate status for target services. The SFX auto-activate status matches SFX selective e-package types (complete or partial) with their Verde counterparts (the auto-active status that equals "Yes" matches the selective complete type, the auto-active status that equals "No" matches the selective partial type). For more information about selective e-package types, see **e-Package** on page **30**.

The localization process sets the Verde selective e-package type according to the SFX auto-active status.

Running the Localization Cleanup Process (Optional)

If no work affecting an e-product was performed on your Verde instance, you can skip this section. In all other cases, you must run localization cleanup prior to running localization.

The localization cleanup process cleans the results of the earlier e-product updates. The process works only on the Verde e-products that are associated with SFX e-products (the Verde e-product SFX ID field is used as an indicator).

The localization cleanup process removes the following:

- e-product status
- selection status (optional)
- local coverage and embargo
- e-product libraries settings
- sync data

To run and monitor the localization cleanup process:

1. Log in to the Verde UNIX environment.
2. Type `vbin`.
3. Run the cleanup script.
   - If you are working on a Linux server, type:

     ```
     ./sfx_localization_cleanup.sh -u
     <INSTANCE_administrator_username> -p
     <INSTANCE_administrator_password> -s [yes]
     ```

   - If you are working on a Sun Solaris server, type:

     ```
     bash sfx_localization_cleanup.sh -u <
     INSTANCE_administrator_username> -p <INSTANCE
     _administrator_password> -s [yes]
     ```

NOTE:
The `-s` parameter is optional. If you type `yes`, the cleanup process erases all selection statuses. Any value other than `yes`, including a null value, is treated as `no`.

4 Monitor the process with the help of the `/exlibris/verde/v2_<slot number>/verde/home/system/log/SFXLocalizationCleanup.log` log file.

   a Type `vclog`.

   b Type tail `-f SFXLocalizationCleanup.log`.

   The process is complete when the following line appears in the log file:

```
END LOCALIZATION CLEANUP
```

NOTE:
e-Product attributes, such as acquisitions and licenses, are not removed during the cleanup process.

Running Localization

After creating the export files, FTP the files to your Verde server or save the files to your local PC. Then initiate the localization process. The process is run from the Admin module's Initial tab.

To run the localization process:

1 In the Admin module's **Initial** tab, click **Localization**. The following window is displayed.

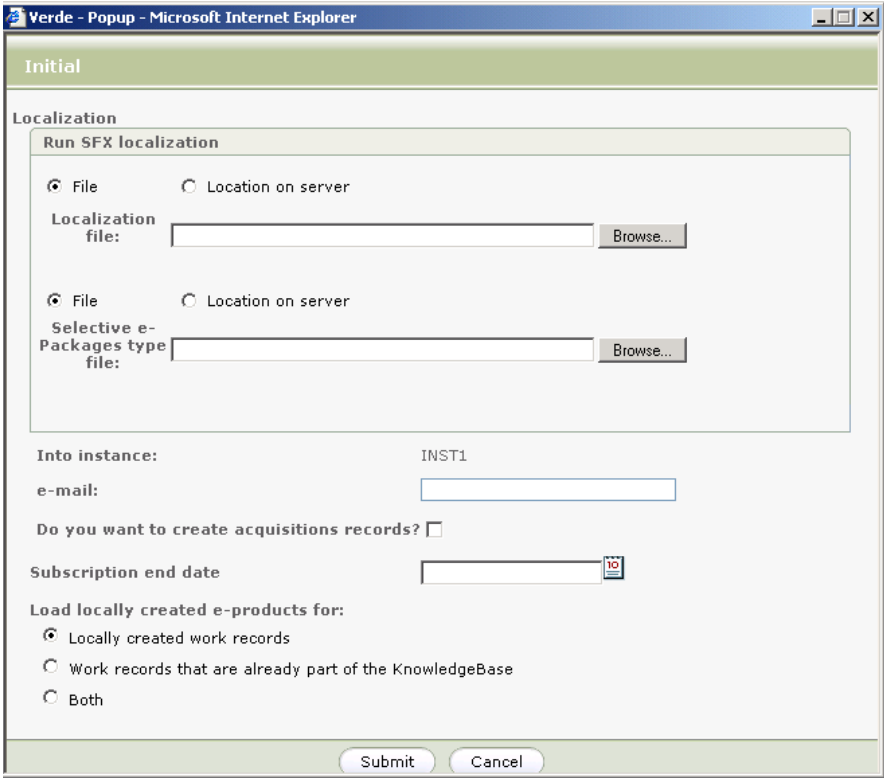

Figure 173: Localization

2 Under **Run SFX Localization**, choose one of the following options for the files you want to localize:

- If the file is on your PC, select **File** and browse to locate the file on your machine.
- If the file is on the Verde server, select **Location on server** and enter the path and name of the input file.

3 In the **E-mail** text box, enter the e-mail addresses to which you want Verde to send a notification e-mail when the localization process is complete. Use semicolons to separate between the e-mail addresses you enter.

4 Select **Do you want to create acquisition records?** if you want to create an acquisition record for every e-package activated by the localization process. The acquisition record is assigned a status of **In Process 1**, a start date equal to the date on which the localization process is run, and an end date as specified in the following step.

5 If you selected **Do you want to create acquisition records?**, enter or select an end date to assign these records in the **Subscription end date** box.

6 Under **Load locally created e-products for**, select one of the following options:

- **Locally created work records** – Creates local e-products for local work records only. e-Products that are linked to work records that are already part of the KnowledgeBase will not be loaded.
- **Work records that are already part of the KnowledgeBase** – Creates local e-products only for work records that are part of the KnowledgeBase. Local e-products that are linked to local work records will not be loaded.
- **Both** – Loads all local e-products, regardless of the work record to which they are linked.

7 Click **Submit**. The localization process updates Verde so that the same resources are active in SFX and Verde. For details on the way in which e-products are updated, see **Localization Workflow** on page **539**.

NOTE:
While the localization process is running, you cannot use the Verde GUI.

Localization Workflow

During the localization process, Verde analyses the provided SFX extracts and activates the Verde e-products for which matching active SFX resources are found.

If Verde identifies locally created SFX object portfolios and objects, the localization process creates the appropriate e-products and work expressions in Verde and activates these e-products.

Verde e-products are activated by the localization process in the following way:

- For all e-products – Resources that are active in SFX are assigned an e-product status of **Production** and an **Activation from date** that is equal to the date on which the localization process is run.
- Per e-product – The e-product libraries' activation statuses are set to match those of their corresponding SFX institutes, as defined in the SFX extract. The local coverage and embargo values are set to match those of the corresponding SFX resources.

The following table describes changes that are made in Verde as a result of each type of localization scenario:

Table 94. Possible Localization Scenarios

SFX Data	Localization Changes in Verde
global object + global object portfolio (matches Verde e-constituent) + global target	1 Activates the related e-package 2 Activates the related e-interface 3 Activates the e-constituent 4 (Optional) Creates an acquisition record on the e-package level
global object + global object portfolio (matches Verde e-standalone) + global target	1 Activates the related e-interface 2 Activates the e-standalone 3 (Optional) Creates an acquisition record on the e-standalone level
locally created object + locally created object portfolio + locally created target	1 Creates a work record related to the e-constituent 2 Creates an e-constituent 3 Creates a work record related to the new e-package 4 Creates an e-package 5 Creates a work record related to the new e-interface 6 Creates an e-interface. The title of the e-interface is taken from the 866 "x" tag. 7 Activates the related e-package 8 Activates the related e-interface 9 Activates the e-constituent 10 (Optional) Creates an acquisition record on the e-package level

Table 94. Possible Localization Scenarios

SFX Data	Localization Changes in Verde
locally created object + locally created object portfolio + global target	1 Creates a work record related to the new e-constituent 2 Creates an e-constituent 3 Activates the related e-package 4 Activates the related e-interface 5 Activates the e-constituent 6 (Optional) Creates an acquisition record on the e-package level **Note:** If a local work record exists before the localization process is run, the e-constituent created during the localization process is associated with this work record.
global object + locally created object portfolio + global target	1 Creates an e-constituent linked to the global work record 2 Activates the related e-package 3 Activates the related e-interface 4 Activates the e-constituent 5 (Optional) Creates an acquisition record on the e-package level

Table 94. Possible Localization Scenarios

SFX Data	Localization Changes in Verde
global object + locally created object portfolio + locally created target	1 Creates an e-constituent linked to the global work record 2 Creates a work record related to the new e-package 3 Creates an e-package 4 Creates a work record related to the new e-interface 5 Creates an e-interface. The title of the e-interface is taken from the 866 "x" tag. 6 Activates the related e-package 7 Activates the related e-interface 8 Activates the e-constituent 9 (Optional) Creates an acquisition record on the e-package level

Monitoring Localization

You monitor the localization process with the help of the `/exlibris/verde/v2_<slot number>/verde/home/system/log/localSfxLoad.log` log file.

To monitor the localization process:

1. Type `vclog`.
2. Type `tail -f localSfxLoad.log`.

When process starts, you can view the parameters that were defined. For example:

```
   Send e-mails to: jane.smith@exlibrisgroup.com
    Parameters:
    -u
    TST_administrator
    -p
    *****
    -a
    YES
    -w
    BOTH
    -d
    31/12/2008
    -m
    jane.smith@exlibrisgroup.com
    -i
    /exlibris/verde/v2_1/verde/home/data/import/
localization.xml
    -f
    /exlibris/verde/v2_1/verde/home/data/import/
autoactive.properties
    LKB update got started...
    Input processing started...
```

When the process is complete, the localization summary appears at the end of the log file. For example:

```
 Input processing ended
 The process took 8 minutes
 Input records - 93762
```

NOTE:
It is necessary that you analyze this information. For details, see the following section, **Troubleshooting Errors**.

Troubleshooting Errors

The localization summary contains information on the number of activated records, the number of failed activations, the number of locally created local e-products, and other similar information.

To work with the localization summary section of the log file:

1 Locate the **Input records** line to view the number of records in the input file. For example:

```
 Input records - 93762
```

2 Locate the **Rejected records** section to view details of the number of records that were rejected by the localization process. For example:

```
Rejected records / 866 fields - 37:
Record contains no datafields - 0
Missing 866$z - 0
Missing 866$s - 0
Missing 866$t - 0
Unknown SFX institute - 31
Missing global e-Product - 2
Missing global WorkExpression for new e-Product - 1
Missing global e-Package for new e-Constituent - 3
Activate existing e-Product - missing e-Product - 0
Activate existing e-Product - missing ancestor - 0
Control field 008 is not valid - 0
Warnings: 0
Invalid threshold format (no local coverages created) - 0
Invalid threshold format (no local embargo created) - 0
```

Records are typically rejected in the following cases:

- An SFX record is owned by an institute that is not defined in Verde. Such cases are reported in the following line:

```
Unknown SFX institute - 31
```

- The Verde and SFX KnowledgeBases are not updated to the same level. In this case, the SFX extract may contain records that do not exist in Verde. Such cases are reported in the following lines:

```
Missing global e-Product - 2
Missing global WorkExpression for new e-Product - 1
Missing global e-Package for new e-Constituent - 3
Activate existing e-Product - missing e-Product - 0
Activate existing e-Product - missing ancestor - 0
```

- The Verde and SFX KnowledgeBases are updated to the same level, but some outdated resources remain active in the SFX KB. These resources are no longer part of the SFX and Verde global KnowledgeBases. Such cases are reflected in the following line:

```
Missing global e-Product - 2
```

- There is Invalid data in the SFX extract. Such cases are reported in the following lines:

```
Missing 866$z - 0
Missing 866$s - 0
Missing 866$t - 0
Invalid threshold format (no local coverages created) - 0
Invalid threshold format (no local embargo created) - 0
```

3 Locate the following lines to check the number of records that were activated and created by the localization process:

```
Created and activated local e-Products
Created local WorkExpressions
Activated existing e-Products
```

4 (Optional) Locate the following lines to check the number of acquisition records created by the localization process:

```
Created Acquisition records
Created Subscription Period records
```

5 If the summary lists a number of rejected records, retrieve additional information on these records as follows:

a Type `vclog`.

b Type `grep ERROR localSfxLoad.log`.

Information such as the following is retrieved::

```
2008-11-16 20:16:31,165 ERROR
[com.exlibris.verde.loader.LocalSFXDataHandler] Missing
global e-Product - record rejected (identifier=,
866$z=1000000000450779, 866$x=LexisNexis Academic:Full Text)

2008-11-16 20:18:31,939 ERROR
[com.exlibris.verde.loader.LocalSFXDataHandler] Missing
global e-Product - record rejected (identifier=,
866$z=1000000000452240, 866$x=LexisNexis Academic:Full Text)

2008-11-16 20:19:55,896 ERROR
[com.exlibris.verde.loader.LocalSFXDataHandler] Unknown
active SFX institute Kresge - record rejected
(identifier=1552-700X, 866$z=1000000000686348,
866$x=EBSCOhost Communication & Mass Media Complete:Full
Text)
```

NOTE:
The 866 "z" (SFX ID) and 866 "x" (Target service title) identifier fields indicate which records were rejected.

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The Profiles Tab

This section includes:

- **About the Profiles Tab** on page **547**
- **Creating a New Profile** on page **548**
- **Editing a Profile Record** on page **549**
- **Deleting a Profile** on page **551**

About the Profiles Tab

Profile definitions include specific, granular authorizations or permissions, as well as restrictions. A staff user associated with a particular profile is able to activate only those functions allowed by this profile.

NOTE:

In a shared consortium, users within any one of the local instances must have a guest profile for the central instance. For more information, see **Setting Up Guest Profiles** on page **577**.

The **Profiles** tab in the Admin module displays a list of predefined profiles.

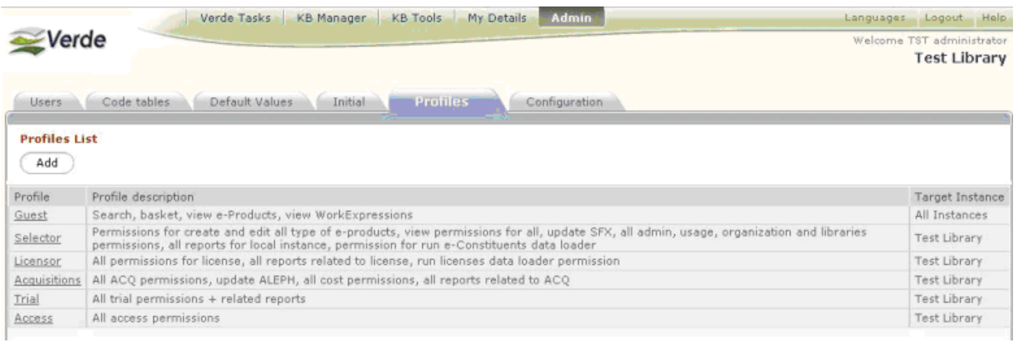


Figure 174: Predefined Profiles List

The Profiles List displays the following information for each profile:

- Profile
- Profile Description
- Target Instance

Creating a New Profile

When you create a new profile, you must define the profile's details, the instance(s) for which the profile is available, and the privileges applicable to the profile.

To create a new profile:

1 In the **Profiles List**, click **Add**. The following screen is displayed.

Figure 175: Profiile Details

2 In the **Edit Profile Details** section of the **Profiles** tab, enter the name you want to assign the profile (required field) and a description of the profile that defines its function.

3 Under **Available for Instances**:

- If you are working in a single-instance environment, select **Current instance** (the default option).
- If you are working in a multi-instance environment and want to make the profile you are creating available to other instances, select **Other**

instances. The screen expands, enabling you to select **All instances**, or specific instances from the **List of instances** drop-down list.

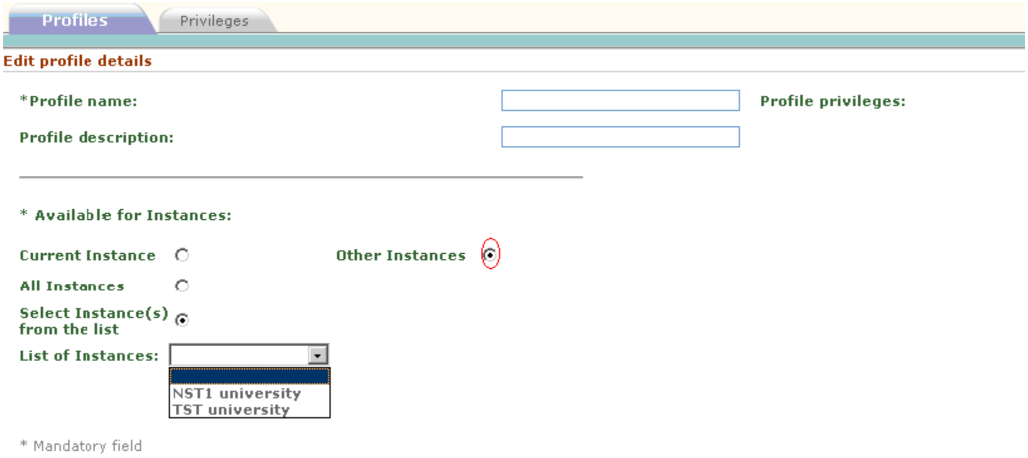


Figure 176: Profile Details for Multi-Instance Installations

4 Click the **Privileges** tab and select the **KB Manager** (for details, see **KB Manager Module Privileges** on page **504**) and **KB Tools** (for details, see **KB Tools Module Privileges** on page **510**) module permissions you want to assign to the profile you are creating.

5 Click **Submit**. The profile is created in the Verde database and you can view a summary of the profile permissions you defined in the **Profiles** tab, under **Profile Privileges**.

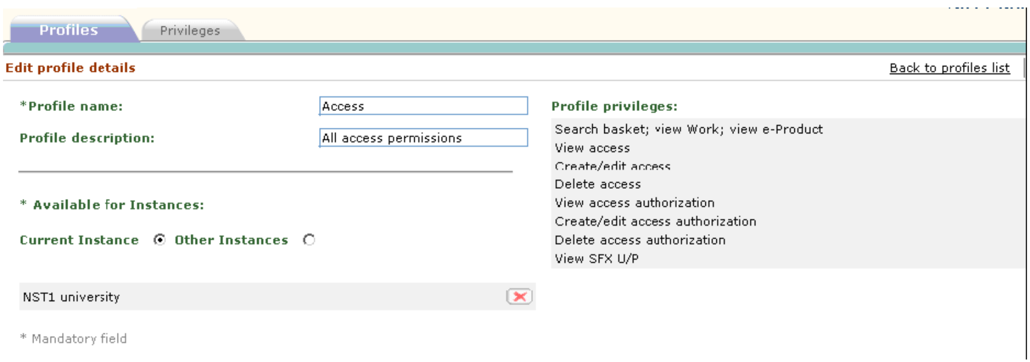


Figure 177: Summary of Selected Permissions

Editing a Profile Record

You can edit existing profile records.

To edit an existing profile record:

1 In the **Profiles List**, click the name of the profile.

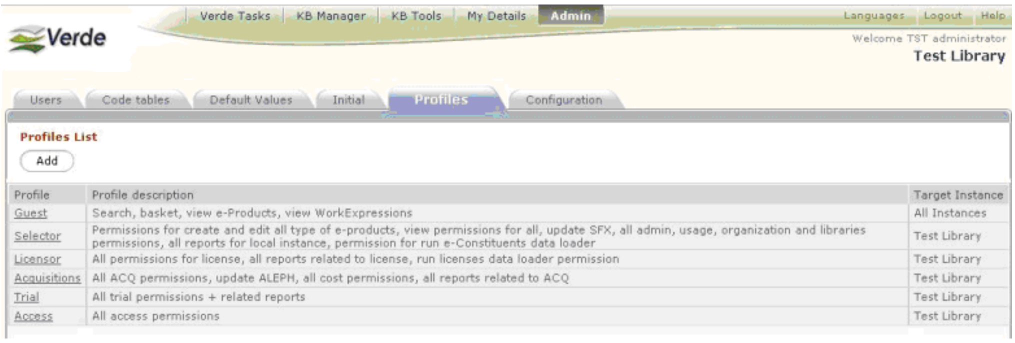


Figure 178: Profiles List

The following screen is displayed.

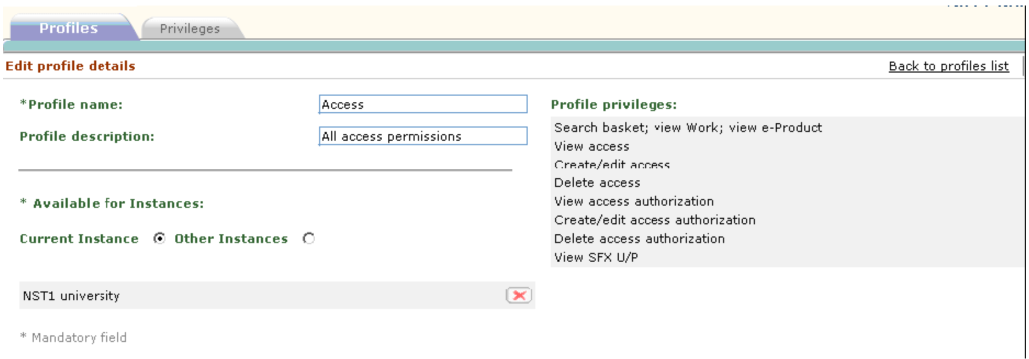


Figure 179: Edit Profile Details

2 Edit the profile's properties as required. For details, see **Creating a New Profile** on page 548.

3 Click **Submit**. Your modifications are saved in the Verde database.

Deleting a Profile

You can remove a profile from both the Profiles list and Verde database.

To delete a profile:

1 In the **Profiles List**, click the name of the profile.

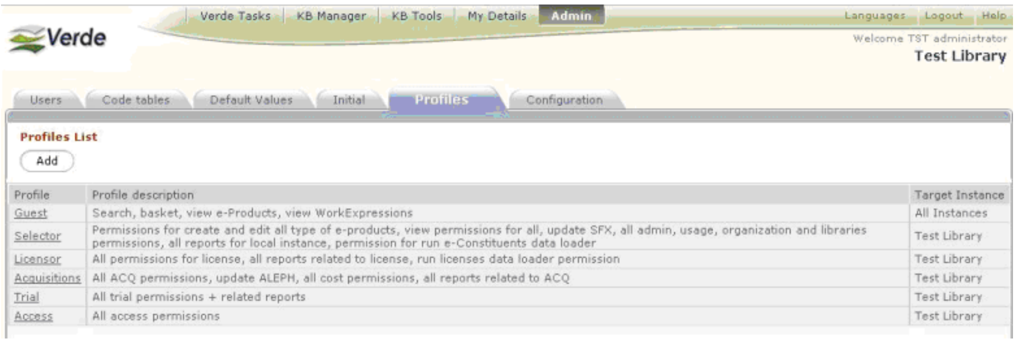


Figure 180: Profiles List

2 In the screen that opens, click the **Delete** button and click **Yes** to confirm deletion. The profile is deleted from the Profiles List and from the Verde database.

45

The Configuration Tab

This section includes:

- About the Configuration Tab on page 553
- Configuring External Services on page 554
- Configuring the e-Product Summary on page 556
- Configuring Local Fields on page 558

About the Configuration Tab

The **Configuration** tab in the Admin module enables you to configure the following:

- parameters for external services used by Verde
- the way in which the e-product Summary is displayed
- local fields

Figure 181: Configuration Tab

Configuring External Services

You can configure parameters for the external applications with which Verde communicates and for the services used by Verde to communicate with these applications. Verde can interoperate with the following external applications: SFX, Aleph, Voyager, and the Usage Statistics Service (UStat).

To configure parameters for external services:

1 In the left menu of the Admin module's **Configuration** tab, click **External Services**.

2 Click **Add New Service**. A wizard opens, displaying the following screen.

Figure 182: Select Application

3 Select the application for which you want to configure parameters and click **Next**.

4 In the following step of the wizard, select the application services for which you want to configure parameters and click **Next**. By default, all services are selected. For information on the available SFX services, see **Verde-SFX Interoperability** on page 606.

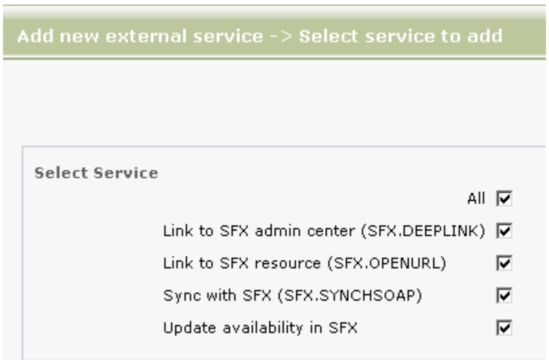


Figure 183: Select Service

NOTE:
Only one service is available if you selected the Aleph or Voyager application.

5 In the following screen, enter the server name, port, and library for the application service(s) you previously selected. The values for these fields should be identical for all the SFX services communicating with your Verde instance.

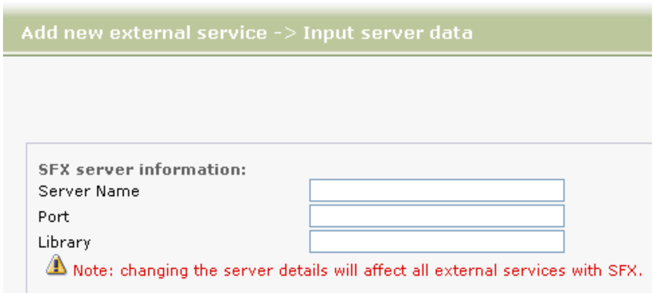


Figure 184: Input Server Data (SFX)

NOTE:
If SFX services are already defined for your Verde instance, the fields in this screen will be pre-populated with previously defined values. If you edit these values, the updated values are applied to both the new SFX services you selected as well as the previously defined services.

Click **Next**.

6 In the following screen, enter a user name and data for each previously selected service. This data is specific for each service.

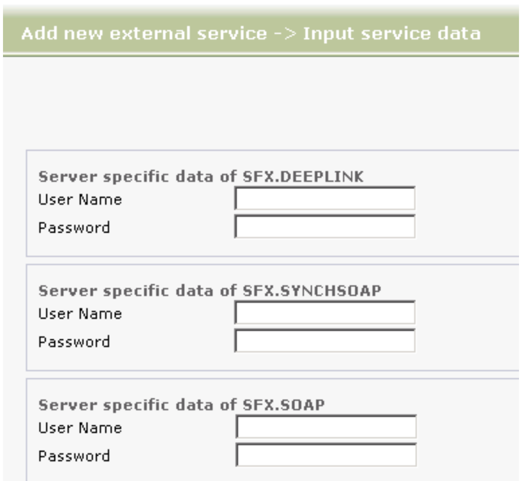
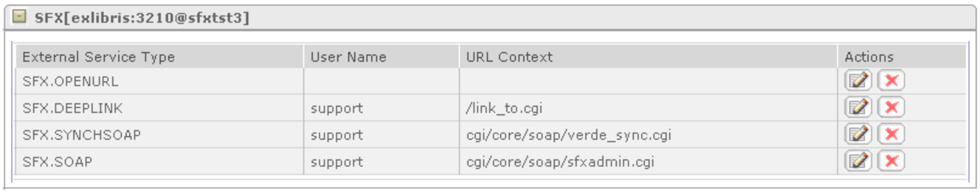


Figure 185: Input Service Data (SFX)

NOTES:

- The password is encrypted and appears as dots.
- The Link to SFX resource service does not require these parameters.

7 Click **Finish**. The wizard closes and the information you entered for each application and service is displayed in tables. Each table can be collapsed or expanded.



SFX[exlibris:3210@sfxtst3]

External Service Type	User Name	URL Context	Actions
SFX.OPENURL			
SFX.DEEPLINK	support	/link_to.cgi	
SFX.SYNCHSOAP	support	cgi/core/soap/verde_sync.cgi	
SFX.SOAP	support	cgi/core/soap/sfxadmin.cgi	

Figure 186: List of Services for an Application

The server and port values are displayed to the right of the application name. The user name and URL context values for each service are displayed in the table under the application with which the service is associated. The displayed information can be edited or deleted.

Configuring the e-Product Summary

You can configure the following for the e-product Summary screen:

- the sections to be displayed in the e-product Summary screen
- the fields to be displayed in each section
- the display order of the sections
- the display order of fields in each section
- whether a section is expanded or collapsed by default

To configure the e-product Summary:

In the left menu of the Admin module's **Configuration** tab, click **Summary**. The following screen is displayed.

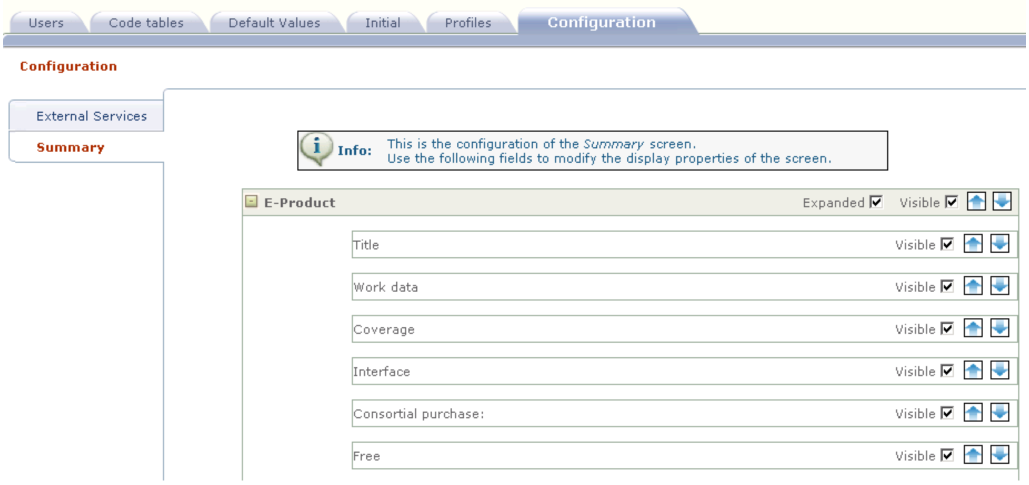


Figure 187: Configuration Tab - e-Product Summary Configuration

By default, all sections and fields are selected and the e-Product section is expanded.

- To prevent a section from being displayed in the e-product Summary screen, clear in the **Visible** check box in the section's title bar. For example, if you clear the **Visible** check box in the **Trial** section's title bar, as illustrated below, the Trial section will not be displayed in the e-product Summary screen.

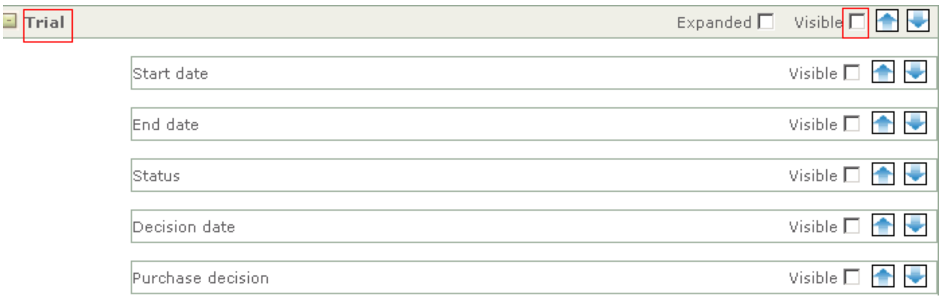


Figure 188: Trial Section – Clearing the Visible Check Box

- To prevent a field from being displayed in the e-product Summary screen, clear the **Visible** check box at the end of the field's row. For example, if you clear the **Software requirements public** and **View Admin settings** fields, these fields will not be displayed in the e-product Summary screen.

- To change the display order of a section in the e-product Summary screen, click the **Up** or **Down** arrow in the section title bar.

Figure 189: Up and Down Arrows – Section Title Bar

- To change the display order of a field within a section, click the **Up** or **Down** arrow at the end of the field's row. For example, if you click the **Interface** field's **Up** arrow, as illustrated below, this field will be displayed after the **Work data** field and before the **Coverage** field in the e-product Summary screen.

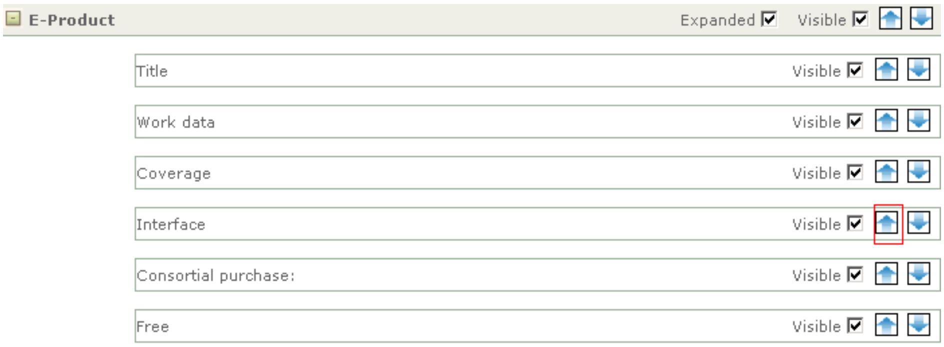


Figure 190: Up and Down Arrows – Fields

- To display a section as expanded in the e-product Summary screen, select the **Expanded** check box in the section's title bar. To collapse a section, clear this check box. By default, only the e-Product section is displayed as expanded.

Configuring Local Fields

In addition to the fields that exist by default in each e-product or e-product attribute record, you can define local fields for the following, enabling the Verde instance to store additional information:

- e-product records
- acquisition records
- license records
- access records
- admin records
- trial records

- cost records
- usage records

After you define such fields, they are displayed in the **Local Fields** tab of the relevant e-product or e-product attribute record.

To configure local fields:

1 In the left menu of the Admin module's **Configuration** tab, click **Local Fields**.

2 From the drop-down list, select **e-product** or the type of attribute record for which you want to create local fields and click **Add**. The Local Field Form window opens.

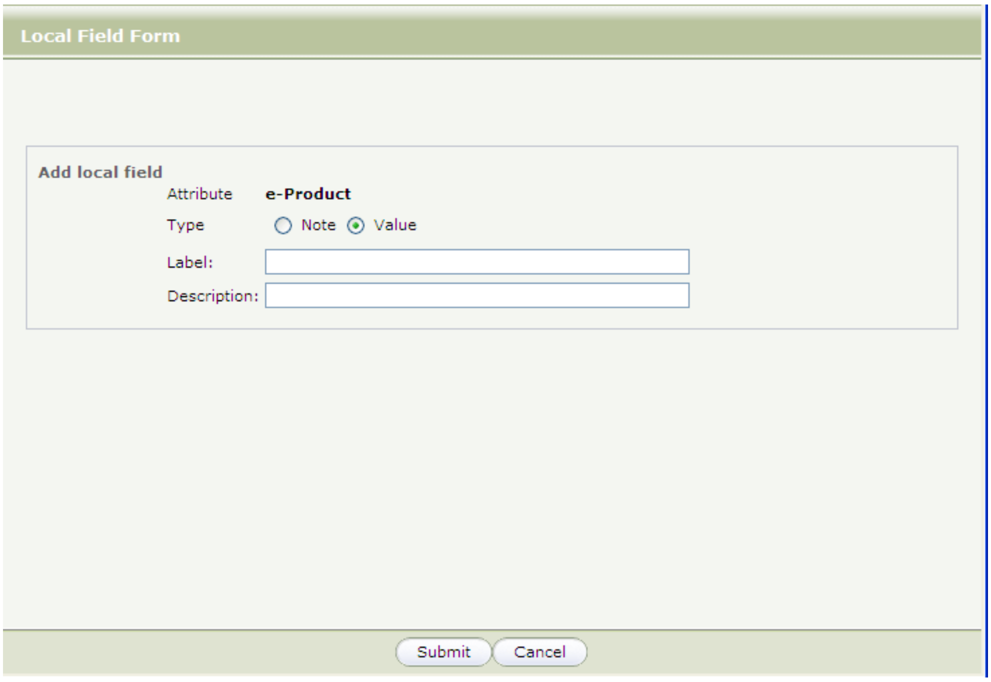


Figure 191: Local Field Form

3 Select the type of local field—**Note** or **Value**—that you want to create.

NOTES:

- In the KB Manager, a value field type is limited to 50 characters. A note field type is limited to 750 characters.
- There is no limit on the number of local fields that may be associated with a record.
- e-Product, acquisition, license, and trial record local fields that are of the type **Value** can be searched using the KB Manager search mechanism.

Local fields that are of the type **Note** cannot be searched. For information on searching local fields, see **Searching for e-Products** on page **32**.

- Information on e-Product, acquisition, license, and access local fields can be viewed in the General Report for e-Products. For information on this report, see **General Report of e-Products** on page **249**.

4 In the **Label** box, enter the name of the field to appear in the Local Fields tab.

5 In the **Description** box, enter tooltip text that describes this field.

6 Click **Submit**. The Local Fields Form window closes and the new local field you created appears in the main Local Fields window, in alphabetical order.

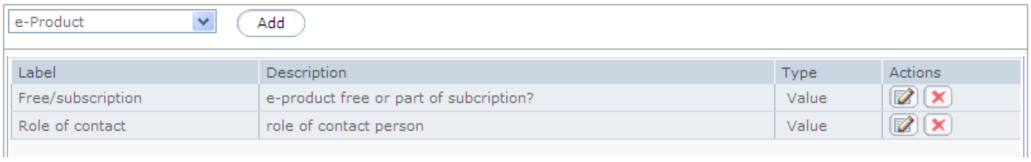


Figure 192: List of Local Fields

To edit a local field, click the **Edit** button. Note that the type of local field cannot be updated.

To delete a local field, click the **Delete** button. The local field is deleted only if it is not in use.

Part VII

Shared Consortium Environments

Part VII contains the following:

- **Section 46: The Shared Consortium Environment** on page **563**
- **Section 48: Setting Up a Shared Consortium Environment** on page **571**
- **Section 47: Working in a Shared Consortium Environment** on page **565**
- **Section 49: Search, Display,and Navigation in a Shared Consortium Environment** on page **581**
- **Section 50: Merged View** on page **593**

46

The Shared Consortium Environment

This section includes:

- Glossary of Terms on page 563

A shared consortium environment is an environment in which multiple instances exist. One of these instances serves as the central instance, while the other instances are member instances. In Verde, the shared consortium environment provides tools to support the management of shared and non-shared resources, as well as enhanced cross-consortium search and filter capabilities, cross-consortium navigation, merged displays, and cross-consortium reporting.

Glossary of Terms

Multi-instance – a Verde installation that works in a mode that supports interaction between the instances.

Shared consortium environment (shared model) – the multi-instance model that includes a central instance and cooperation between the member instances.

Non-shared model – the multi-instance model that may support cooperation, but does not support sharing between instances.

Central instance – sometimes referred to as the shared instance. This is the instance that is responsible for managing shared resources. The central instance cannot be a member instance.

Member instance – an instance that is part of the consortium, but is not the central instance. Sometimes referred to as a local instance.

Institute – a subdivision of an instance. In the central instance, each local instance should be defined as an institute (its Related Instance value should be defined as **member instance**).

Local Institute – a particular library within a member instance. In the central instance, each local institute can be defined using the Related Institute field.

Local institutes are relevant only for the asymmetrical synchronization model. For details, see **Synchronizing Updates in Consortia** on page **615**.

Consortium level – sometimes referred to as tier. Three consortium levels are supported: managed for all, managed for some, and managed locally.

Active instance – the instance you are logged into.

Local – an e-product is local if it has a member instance-level e-product status or selection status, or an attribute record (license, acquisitions, trial, etc.).

Search KB – flag for searching. If selected, non-local records from the KnowledgeBase are included in the search results.

Managed for – If an e-product is managed for an instance, the center controls the e-product but makes it available to the local instance.

Managed by – If an e-product is managed by an instance, it is controlled in the member instance.

Active – an e-product is active if it has an e-status and if the current date is larger than the **activation from** date and less than the **expiration** date.

47

Working in a Shared Consortium Environment

This section includes:

- Managing Resources Centrally on page 565
- Managing Resources Locally on page 567
- Propagating Locally Created Records on page 568

Resources in a shared consortium environment fall into one of two categories: **managed centrally** or **managed locally**. Resources that are managed centrally are activated in the center for one or more member instances. Resources that are managed locally are activated, acquired, and licensed by the member instance in the member instance.

The central instance is responsible for the management of shared resources—that is, resources that are active for one or more member instances. The management of shared resources involves activating the resources for one or more member instances as well as managing acquisitions and/or licensing of the same resources. Member instances are responsible for managing the local data that is maintained for shared resources as well as managing all aspects of local resources.

Managing Resources Centrally

Resources that are managed centrally are activated and controlled in the center for member instances. This means that data that resides in the e-product record—namely, status, selection status, activation from date, expiration date, coverage, embargo, and availability (among other fields)—is all set in the center. If an e-product is managed in the center for a member instance, the e-product from the center will be retrieved when searching the member instance. The e-product will also display from the member instance.

e-Product Libraries

The e-product **Libraries** tab is used to designate the consortium members for which the e-product is managed. Each member instance must be configured as a library of type **institute** in the central instance. It will then display in the Libraries tab of the e-product. When an e-product is "localized"—that is, either an e-status or a selection status is assigned or the e-product has at least one attribute record—the Libraries tab must be edited by the user or it will default to the default library behavior that is set in the library record. To make the e-product available to a member, select the corresponding library from the list of libraries in the e-product Libraries tab. In each library record, there is an option to indicate whether the default is to make this library active or inactive. Selecting **all** will make the e-product available to all members. Note that at least one library must be selected. If no default behavior is set and the e-product library is not edited, the system will automatically assign the value **all**, meaning that the e-product is available to all libraries.

The e-product libraries must be set in e-package and e-standalone records. e-Constituent records can either inherit the library settings from their package record, or they can have their own settings. e-Constituents should have independent library settings only if their library settings differ from that of the package. To create e-constituent-level library settings, click the **Add** button in the e-constituent record's **Libraries** tab. Select the appropriate libraries from the library list and then click **Submit**. Note that in e-constituent records, the Libraries tab is read-only until you click the Add button.

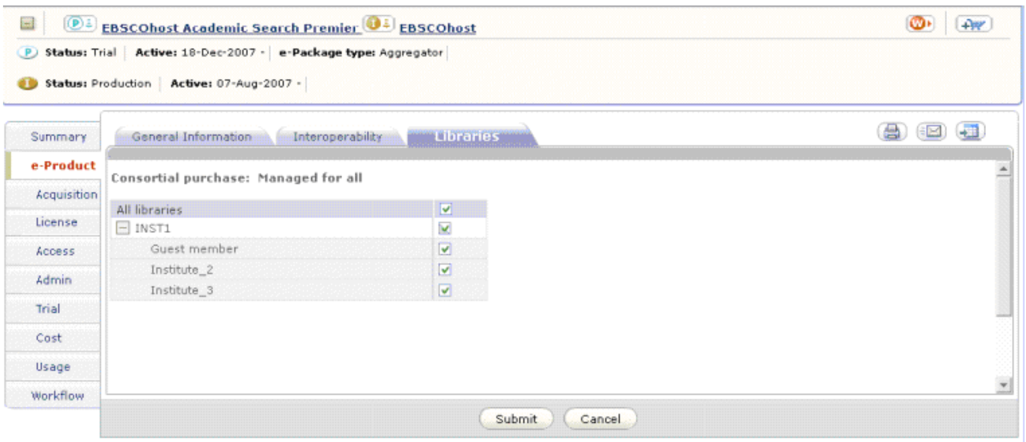


Figure 193: e-Product Libraries

Consortium Level

The consortium level field displays in shared consortium environments only. It displays from the third tab of the e-product, the e-product **Libraries** tab. The consortium level field is set automatically by the system, based on the library settings of the e-product. If the e-product is managed centrally and all libraries are selected, the consortium level is **Managed for all**. If the e-product is managed centrally and one or more but not all libraries are selected, the consortium level is **Managed for some**. The consortium level displays in the Libraries tab and in the results screen.

The consortium level is always managed at the same level as the e-product library. This means that if an e-constituent has its own library settings, it will also have its own consortium level. Otherwise, it will inherit both the libraries and the consortium level from its package.

e-Product Attributes

When an e-product is managed centrally, the activity status, coverage, and availability must be set in the central instance for all member instances. However, other data can be managed centrally or locally, depending on the local practice. In many consortia, trials, acquisitions, and licensing are performed centrally, but access, usage, and cost are maintained by the local instances.

NOTE:

Attributes are not changed in the way that the e-product status is changed and are managed separately for each instance. There is no attribute inheritance between instances

Managing Resources Locally

Resources that are managed locally are managed in the member instance for the member instance. When resources are managed locally, the e-product and all of its attributes are updated and maintained in the member instance alone. An e-product can be managed for a member by the center and managed by the member for itself at the same time. This can occur when a member purchases additional titles from a package or when they purchase additional coverage.

e-Product Libraries

Member instances can have library sub-divisions. The e-product library data can be maintained for resources that are managed locally by the member instance. e-Product libraries cannot be set in the member instance for resources that are managed in the center.

Consortium Level

The consortium level displays in the third tab of the e-product record, the e-product **Libraries** tab. The consortium level is set automatically by the system. For records that are managed by the member instance, the consortium level is automatically set to **Managed locally**. The consortium level field is managed on the same level as the e-product libraries, so if an e-constituent inherits libraries from its package, it will also inherit the consortium level from its package.

Propagating Locally Created Records

Any e-product or work record that is part of the Verde KnowledgeBase will be included in the center as well as in all member instances. These records have e-product and work record codes that are common to the record wherever it is found. These codes facilitate navigation and linking between instances. Records—especially e-product records—that are not part of the KnowledgeBase will not necessarily have common identifiers. To facilitate navigation between records in a multi-instance environment and to allow the management of the e-product and its attributes to be distributed across multiple instances, Verde automatically propagates locally created e-product and work records from the instance in which they are created to all other member instances. This means that if a work record and e-package are created in the center, they will be copied to each of the member instances. The same is true for the member instances; if a work or e-product record is created in the member instance, it is copied to all other member instances and to the center. The source record triggers creation and update to records in other instances.

Locally Created Work Records

When a work record is copied from one instance to another, all of the non-local fields are copied. Local fields are stored in the MARCXML record in fields that begin with a 9—for example, 901, 902, and so forth. Local fields display in the user interface with **Local** as part of the field name. Updates to any of the non-local fields in the work record are passed along to all copies of the record. However, updates to local fields are not.

Locally Created e-Product Records

When an e-product record is copied from one instance to another, only the global fields are copied. Any update to a global field in the source record will be distributed to e-product records in other instances. Neither the data contained in the non-global fields, nor updates to non-global fields, will be distributed across instances.

The following is a list of the global fields:

- e-product type
- e-package type
- e-product code
- work code (link to work record)
- up code (link to higher level record, either e-package or e-interface)
- creation date
- created by
- jkey

NOTE:
Global fields are not editable in instances other than the instance in which the record was created.

48

Setting Up a Shared Consortium Environment

This section includes:

- **Setting Up the System Configuration Parameters** on page **571**
- **Configuring Institutes** on page **572**
- **Selecting Instance Abbreviations** on page **574**
- **Working with Users** on page **575**

A shared consortium environment is always a multi-instance environment. Of the multiple instances, one and only one instance can be designated as the central instance (or center). All other instances are consortium members. The center cannot be a member. Member instances that have access to shared resources must be configured as institutes of the central instance. This enables the center to manage e-products for the member instances.

Setting Up the System Configuration Parameters

The file `global.properties` contains the following two system configuration parameters that must be configured if you are working in a shared consortium environment:

- `verde.share.mode` – defines the mode in which you are working. Possible values are:
  - `separate` – enables multi-instance searching, but no cooperative acquisitions, activation, or licensing
  - `share` – the model described in this section
- `shared.instance` – defines the central instance

The following is an example configuration:

```
<category name="system">
  <property name="verde.share.mode" value="SHARE" />
  <property name="shared.instance" value="INST1" />
  <property name="global.properties" value="/exlibris/verde/ v2_1/
verde/home/profile/global.properties"/>
  <property name="verde.initialization" value="true"/>
</category>
```

For more information on customizing system configuration parameters, contact your Implementation or Support representative.

Configuring Institutes

Verde supports the following two types of consortium members:

- Full members – also referred to simply as members. Full members have Verde instances of their own in which they manage local resources.
- Guest members – members for which the center manages resources. Guest members do not have Verde instances of their own.

Both types of members—full and guest—must be configured as libraries of type **institute.**

To configure a member instance to work in a shared consortium environment:

1. Log in to the central instance and select **Managing > Libraries**. The Details tab opens, enabling you to create a new library record.
2. In the **Library code** field, enter a unique library code. The library code cannot be the same as the member instance code, or as any other library or organization code within the same Verde installation.

NOTE:

The Verde Implementation team recommends using the following conventions in defining a library code:

For full members, add **_i** to the instance code. For example, if the instance code is **UMCB**, the library code would be **UMCB_i**.

For guest members, add **_g** to the instance code. For example, if the instance code is **UMCB**, the library code would be **UMCB_g**.

3. In the **Library name** field, enter the name you want to assign the library you are creating.

4 (Optional) Enter up to three alternative names for this library in the **Alternate name** fields.

5 Under **Guest member**, select **Yes** if you are creating a record for a guest member or **No** if you are creating a record for a full member.

6 If you selected **No** in the previous step, from the **Related instance** drop-down list, select the member instance with which you want to associate the library you are creating.

7 (Optional) If you selected **No** in step 5 and are working with the asymmetrical synchronization model (for details, see **Synchronizing Updates in Consortia** on page 615), from the **Related institute** drop-down list, select the local institute with which you want the center to communicate.

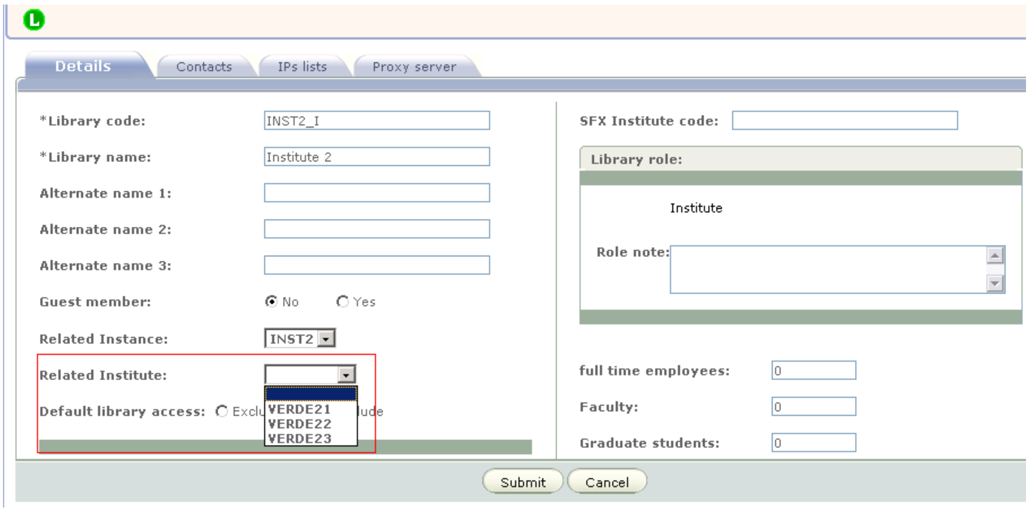


Figure 194: Related Institute

NOTE:

The system does not allow you create two library records with the same related instance and related institute value. If you attempt to create such a record, you will receive an error message.

8 Complete the rest of the library record as described in **Library Details** on page 236.

9 Repeat steps step 1-step 8 for each member instance in your shared consortium environment.

In addition, if there are multiple local institutes within your system's member instances and you want the center to manage each of these institutes, you should define a library record for each institute. For example, if there are three local institutes (VERDE21, VERDE22, and VERDE23) in member instance INST2, you would create three separate library records. In each record, you would select **INST2** as the **Related instance**, but the **Related institute** would differ for each record.

NOTE:
If you create one library representing a specific institute and another library representing the library's member instance, the library representing the member instance includes all the other local institutes within the member instance. For example, if you create one library with a **Related instance** value of **INST2** and a **Related institute** value of **VERDE21** and another library with a **Related instance** value of **INST2** and no value for the **Related institute** field, the latter library would include all the other local institutes within the INST2 member instance (such as VERDE22 and VERDE23, to continue with example provided above).

Selecting Instance Abbreviations

Each local instance and the center instance can select an abbreviation or acronym in addition to the instance name. The instance abbreviation will display in the holdings column of the result screen and from the pull down menus that display as part of the multi-instance searching and navigation. The instance abbreviation is stored in the instance's library record. Note that if the instance abbreviation field is blank, the system will take the first five characters of the instance name.

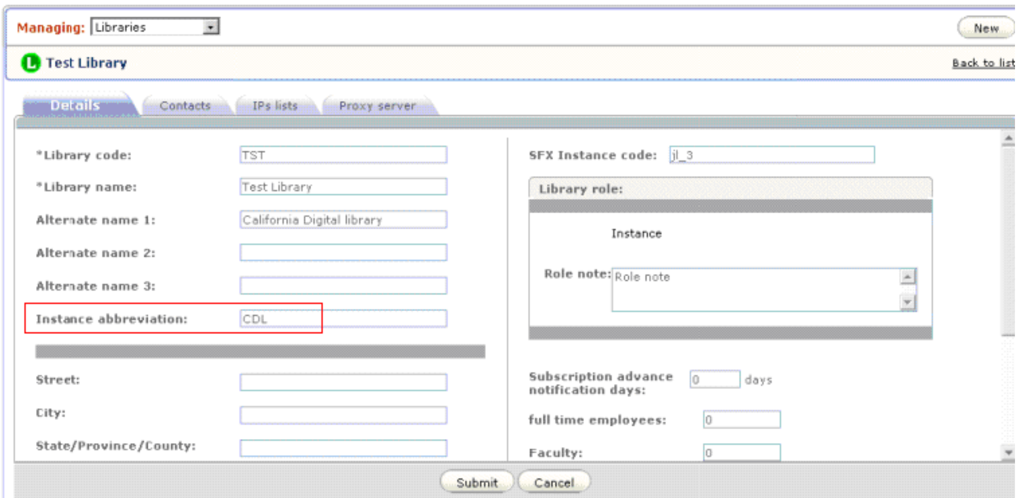


Figure 195: Instance Abbreviation

Working with Users

A user's home instance is the instance in which the user was created and in which the user is displayed. When a user logs in to Verde, the user's home instance is displayed by default. In addition, a user is displayed only in its home instance, so that only administrators in the user's home instance can edit and assign privileges and profiles to the user.

Privileges in the user's home instance can be assigned either via profiles, which are sets of privileges, or directly, using the Privilege tab. Privileges for all other instances can be assigned using profiles only. (Use the **Add Profile** function on the user record to assign profiles to a user. Note the filter by instance option).

Users in a consortium environment can be assigned profiles for one or more instances. In fact, multi-instance searching will work only if users are assigned searching privileges in multiple instances. In the current version of Verde, users in member instances must be assigned profiles that enable them to search the center.

Working in a consortium environment requires cooperation between instances. To enable users from instance A to perform actions in instance B, the administrator of instance B must create an appropriate profile for instance A. The administrator of instance A must then assign this profile to users from instance A.

NOTE:

If a user does not have privileges to search in the central instance, the user is automatically assigned the option of searching for locally managed e-resources only.

To create a profile for another instance in a multi-instance environment:

1 In the **Admin** module, click the **Profiles** tab. The Profiles List is displayed.

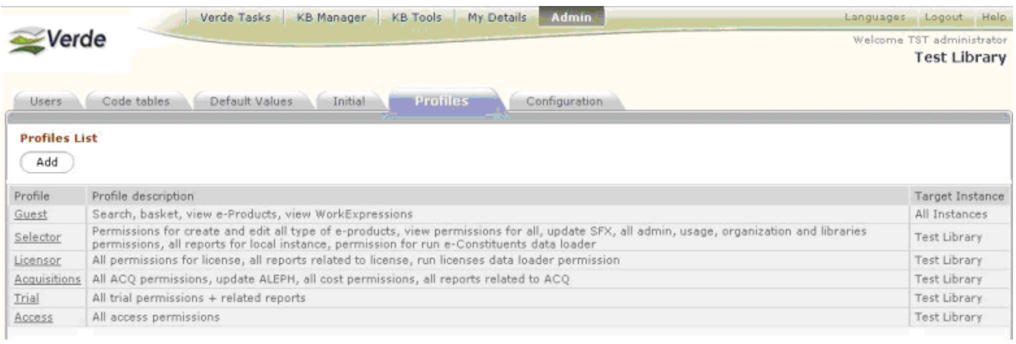


Figure 196: Add Profile

2 Click the **Add** button. The profile details screen, consisting of two tabbed sections, **Profiles** and **Privileges**, is displayed.

Figure 197: Profile Details Screen

3 Enter the name you want to assign the profile, as well as a description of the profile. Note that the **Profile name** field is a required field.

4 Under **Available for Instances**, select **Other instances**. The screen expands, enabling you to select **All instances**, or specific instances from the **List of instances** drop-down list.

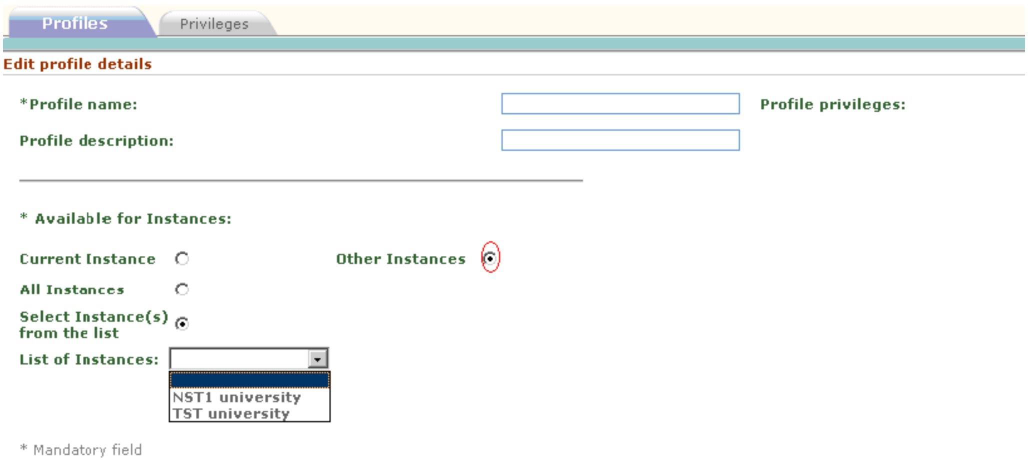


Figure 198: Profile Details for Multi-Instance Installations

5 Select one or more instances (using the CTRL key) from the **List of instances** drop-down list.

6 Click the **Privileges** tab, select the privileges relevant to the profile you are defining, and click **Submit**. The **Profiles** tab is displayed, enabling you to view a summary of the permissions that you have assigned to the profile.

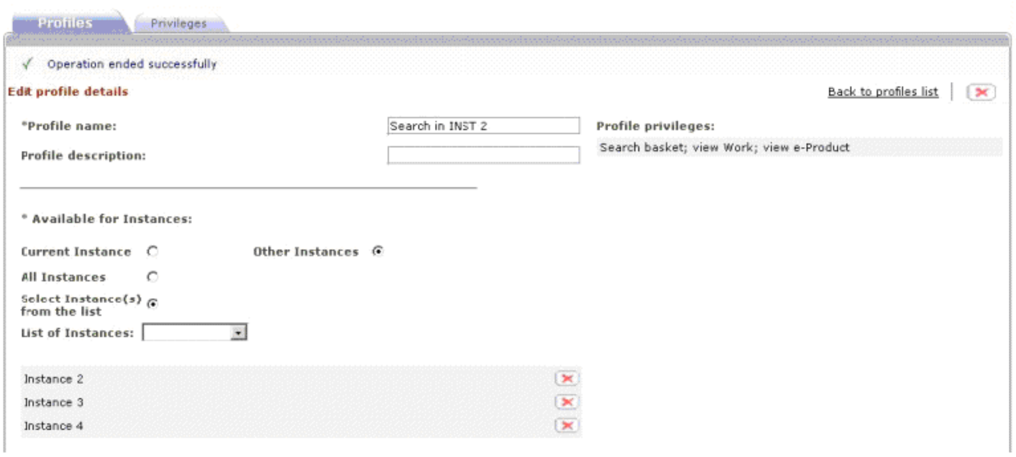


Figure 199: Profile Privileges for Defined Profile

NOTE:

Some privileges are not supported for users working in other instances. You should therefore not assign such privileges to profiles that are being used by users from other instances. The following is a list of such privileges:

1. All privileges related to workflows
2. All privileges related to libraries
3. All privileges related to organizations
4. All KB Tools module permissions, except for report permissions

Once an administrator of an instance selected above assigns the created profile to specific users in this instance, these users will be able to perform the actions governed by the privileges specified within the defined profile.

Setting Up Guest Profiles

A guest profile is a predefined profile that enables the search of, and navigation to, other instances. In addition to creating and assigning profiles for regular users, administrators of each local instance and of the shared instance in a multi-instance environment should create guest profiles for, and assign these profiles to, guest users.

To add a guest profile and assign it to a guest user:

1 Log in as an administrator.

2 In the Admin module, click the **Users** tab.

3 Click the login name of the user to which you want to assign the profile. The user's details are displayed.

4 Click **Add profile**. The Select profile for user screen is displayed.

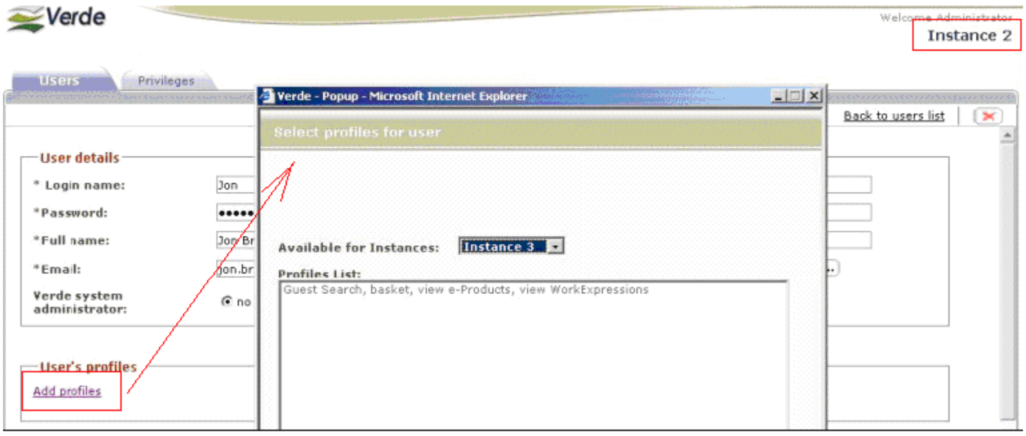


Figure 200: . Add Guest Profile

5 From the **Available for instances** drop-down list, select the instance you want the selected user to be able to search and navigate. This drop-down list contains a list of all the instances that exist in your Verde installation and have profiles defined for your instance.

6 Select **Guest profile** and click **Submit**.

In the example above, the administrator of Instance 2 assigned the selected user a guest profile for Instance 3. After this guest profile is assigned to the selected user, Instance 3 will appear in the list of instances available for this user to search. In addition, this user will be able to navigate to Instance 3 from Instance 2.

Copy/Paste Attribute Profiles

It is possible to copy and paste license, access, or admin attributes from one instance to another within a multi-instance environment. To enable this functionality, the administrator must create a profile that includes the create/edit privilege for the appropriate attribute.

For information about creating such a profile, **Setting Up Guest Profiles** on page 577.

For information about the copy/paste functionality, see **Copying and Pasting e-Product Data** on page 65.

Multi-Instance Report Profiles

Verde enables you to generate multi-instance reports for all existing reports in a consortium environment. Multi-instance reports include data from all selected instances, although the report summary and output are available only in the instance in which the report is generated.

A multi-instance report can be generated only by a user that is assigned a profile with permissions to run reports in another instance.

In the example below, the administrator of Instance 2 created a profile that enables users in Instance 3, Instance 4, and INST1 that are a part of the consortium to generate a general e-product report based on data from Instance 2.

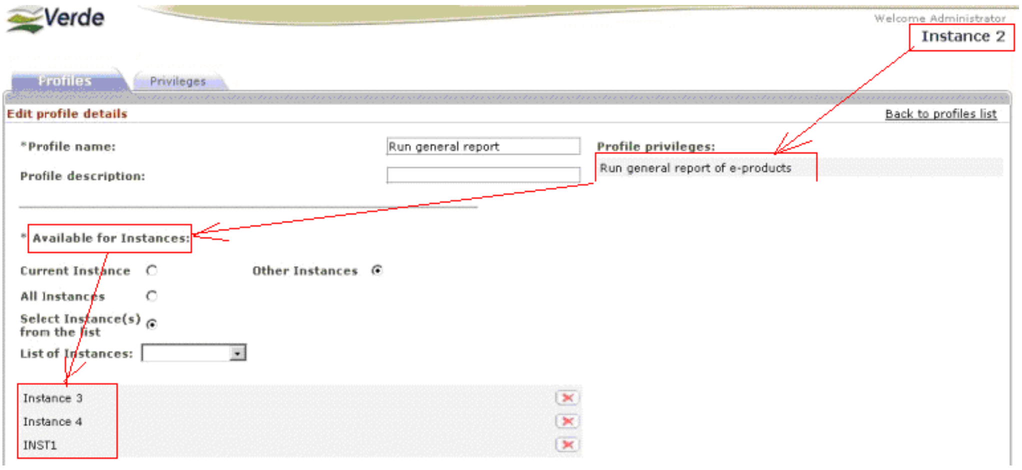


Figure 201: Multi-Instance General Report Profile

NOTE:

All Verde report outputs can be customized by an instance. For more information, see **Customized Report Outputs** on page **293**.

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Search, Display,and Navigation in a Shared Consortium Environment

This section includes:

- Search Profiles on page 581
- Search and Display in the Center on page 582
- Search and Display in Member Instances on page 585
- Search Locally Created e-Product Records on page 588
- Navigation on page 590

In a shared consortium environment, users can search across any combination of instances to which they have access, using a combination of filters. The search interfaces and filters available from the center differ from those available to members.

Search Profiles

If you are working in a multi-instance environment, you can create your own search profile.

To create a search profile:

1. Log in to Verde.
2. Right-click the **Find** button. The Instances to Search window opens.
3. Select the required filter options. (To select or clear a large number of libraries/instance, select the **Clear/Select All** check box.)

4 Click the **Save and Find** button.

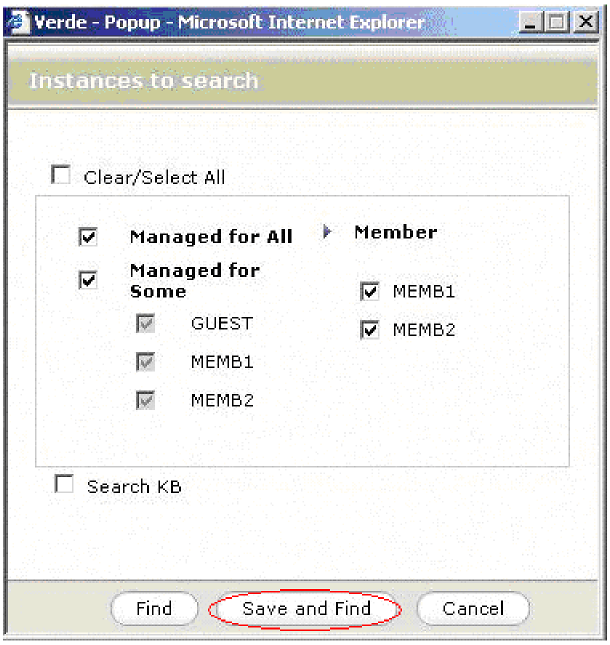

Figure 202: Search Profile

Your search profile is saved. When you next log in to Verde, searches will be performed according to filters you selected for your profile.

To search according to another combination of filters, without changing your search profile, select the required filters in the Instances to Search window and click **Find**.

To change your search profile, select the required filters in the Instances to Search window and click **Save and Find.** The new profile is saved.

NOTE:
It is not possible to search only in the KnowledgeBase. Thus, if you create a profile that includes only the Search KB option, your profile will be rejected.

Search and Display in the Center

When searching from the center, you can filter searches by the following:

- managed for all
- managed for some
- managed for a specific institute
- managed by a specific member instance

- include KnowledgeBase

By selecting the appropriate combination of fields, you can retrieve the following:

- all e-products that are managed for all
- all e-products that are managed for some
- all e-products that are available for a particular instance, regardless of who manages them
- all e-products that are managed by a particular instance
- all e-products that are managed by or for a combination of instances

If you do not right-click **Find**, the search will be performed using the same filters as the previous search. If this is your first search in the current session and you do not have a search profile, the search will be performed in the active instance—in this case, the center. If you do have a search profile, the search will be performed according to the filters defined in your search profile, provided these filters have not been modified. For more information about search profiles, see **Search Profiles** on page 581.

The instance filter is sticky. That is, after you select a set of instances to search, all subsequent searches will be performed on this set of instances until you explicitly set new filters. If you select the check box **Search KB**, KnowledgeBase records that are not localized will be included in the search. **Search KB** can be selected only in conjunction with other instances. It cannot be used alone.

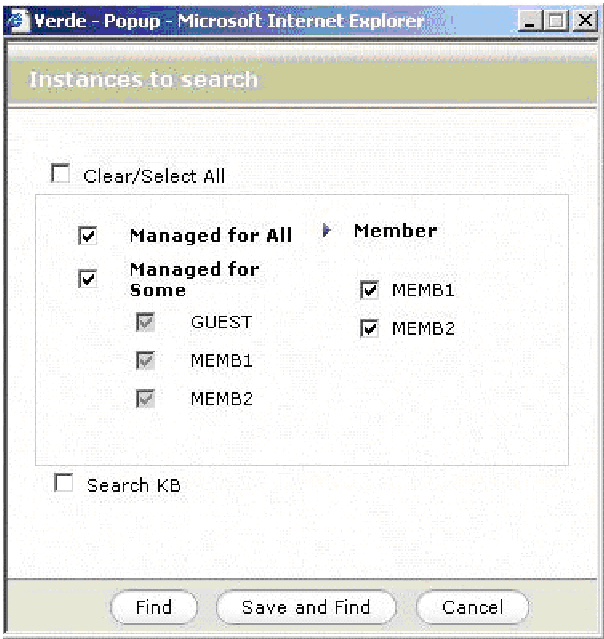

Figure 203: Search – Center

Display

There are three components to the display:

- the search result summary
- the navigation menu that displays when right clicking a button or e-product name
- the Holdings column that displays the instance name and the e-product and e-product selection status in the instance

The search filters largely control what is included in, or excluded from, each of the components. If an instance was included in the search, then it will also display in the search result summary, be included in the navigation menu, and display in the Holdings column. If the instance was not included in the search, it will not be included in any of the above. The only exception to this rule is the active instance (in this case the center), which is always included in the navigation menu and in the Holdings column.

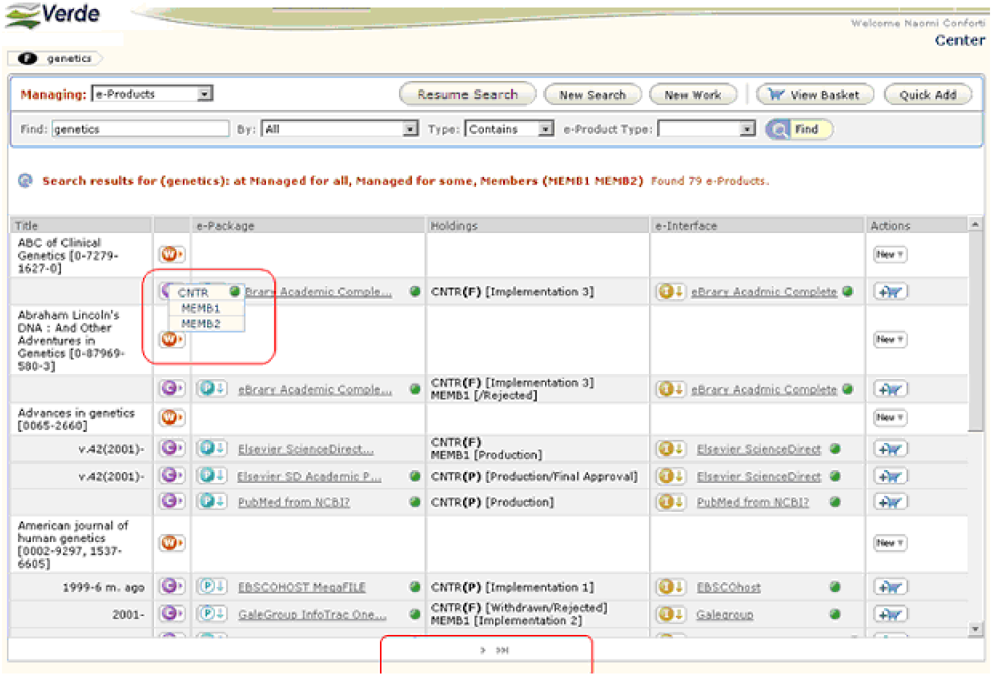

Figure 204: Display – Center

In a consortium environment, the Verde result screen includes a Holdings column, which does not display in non-consortium installations. The Holdings column, the fourth from the left, displays the instance abbreviations of instances that were included in the search and in which the e-product has an e-status or selection status. The status displays next to the instance name in parentheses. For e-products that are active in the center, the consortium level displays next to the instance abbreviation—(F) for **managed for all** and (P) for **managed for some**.

Search and Display in Member Instances

When searching in member instances, you can filter searches by the following:

- active instance
- member instances
- include KnowledgeBase
- managed locally

By selecting the appropriate combination of fields, you can retrieve the following:

- all e-products that are available to (managed for or managed by) one or more member instances
- all e-products that are managed by one or more member instances
- all e-products that are managed for or by an instance or part of the KnowledgeBase

NOTE:
To enable the search and navigation functionality, you must set your browser to allow pop-ups.

To open the Instances to Search window, right-click the **Find** button. If you do not right-click **Find**, the search will be performed using the same filters as the previous search. If this is the first search in the current session, it will be performed in an active instance only. If you have a search profile, the search will be performed according to the filters defined in your search profile, provided these filters have not been modified. For more information about search profiles, see **Search Profiles** on page **581**.

If you select the check box **Include KB**, KnowledgeBase records that are not localized will be included in the search. **Include KB** can be selected only in conjunction with another instance. It cannot be used alone. If you select the

Managed locally check box, records that are managed by the center are filtered out for the instances being searched.

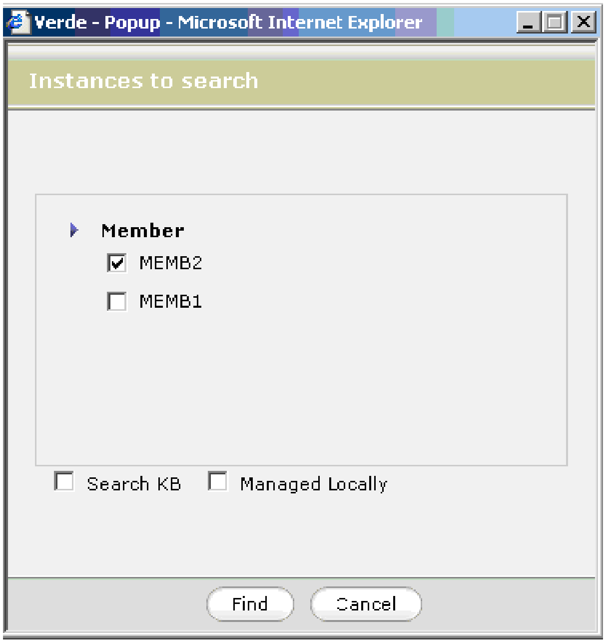

Figure 205: Search – Member Instances

Display

The display behavior in the member instances is similar to that of the center. There is a column for holdings and this column displays the instance name plus the e-product and selection status of the e-product in the instance. Instances that are included in the search display in the Holdings column only if the e-product has a status or selection status in the instance. The active instance is always included in the Holdings column. The center is never included explicitly in the Holdings column. If an e-product is managed locally by one of the instances searched, the instance name appears with a (L). If an e-product is managed in the center for an instance that is included in the search, then the instance name appears with a (C)—for example TST(C) means that the e-product is managed for TST in the center. Searches that are performed with the filter managed locally will not include e-products that are managed centrally.

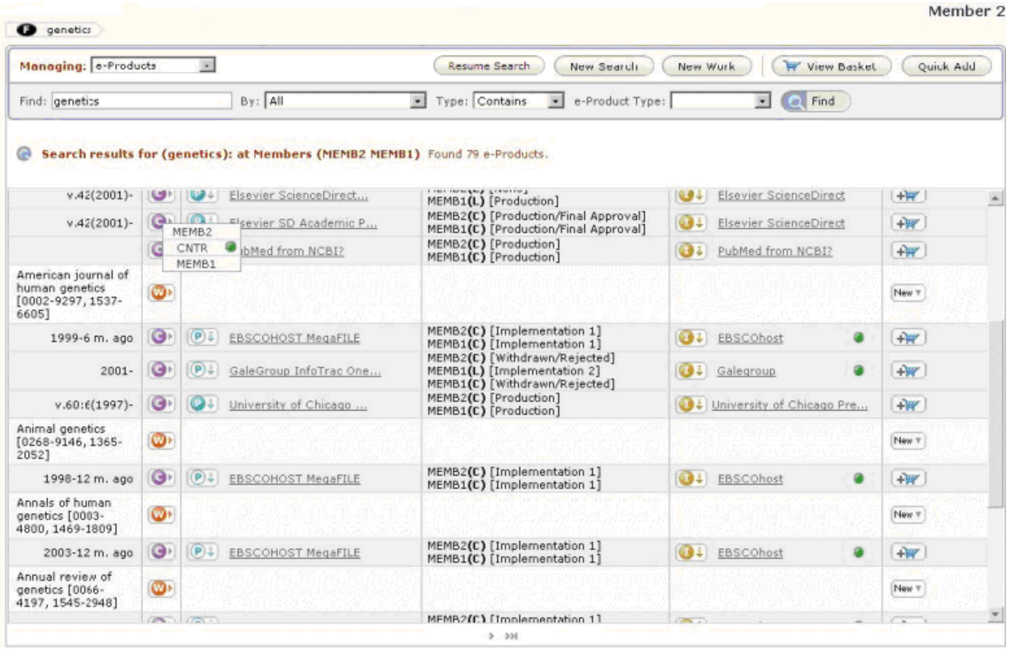

Figure 206: Display – Member Instances

Search Locally Created e-Product Records

e-Products that were created in one of the member instances of the consortium can be retrieved by searching in another instance if one of the following two conditions is met:

- The instance in which the e-product was created is included in the search
- The **Search KB** check box is selected

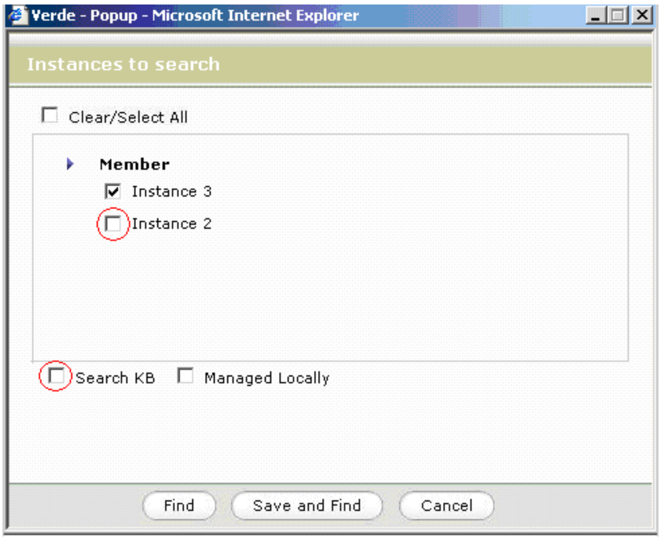

Figure 207: Search Locally Created e-Products in Member Instance

If a user from the central instance would like to retrieve an e-product that was locally created in one of the member instances, the same conditions apply.

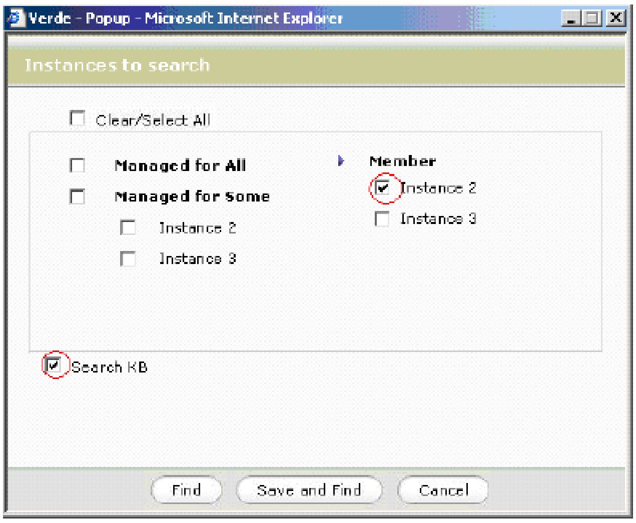

Figure 208: Search Locally Created e-Products in Central Instance

If an e-product was created in the central instance, it can be retrieved in a member instance using the default search parameters.

If the locally created e-product is an e-constituent, it is displayed in the package list of the e-package to which the e-constituent is linked. An e-constituent that is created in one instance is shown in the package list of another instance if the **Display All** option is selected.

For example, an e-constituent entitled **ABC** is created in INST2 and connected to an e-package. If you are in instance INST3 and select the **Display Local** option in the package list, the **ABC** e-constituent is not shown.

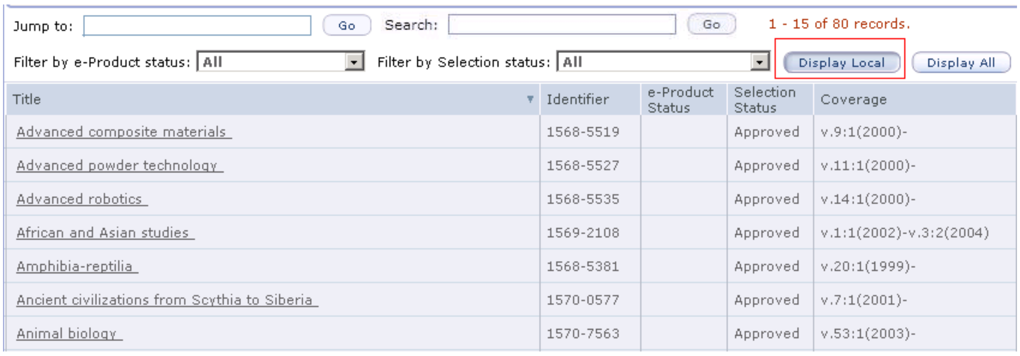

Figure 209: Display Local – Package List

If the **Display All** option is selected, the e-constituent is shown.

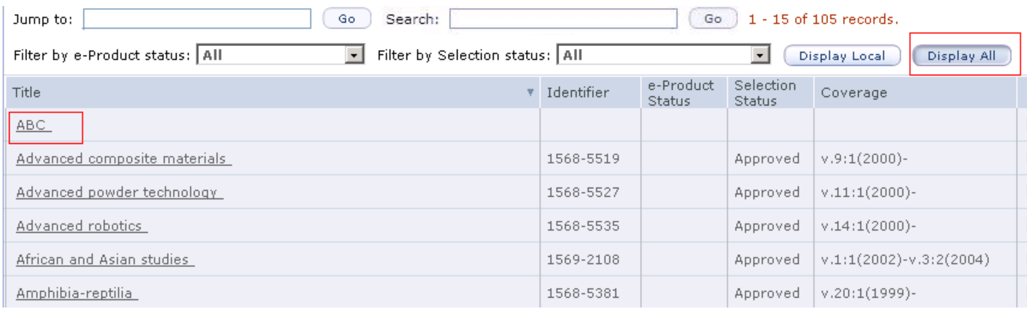

Figure 210: Display All – Package List

If the e-constituent is localized in INST3 (for example, activated), it is shown when the **Display Local** option is selected.

Navigation

To view an e-product or work record, click or right-click the appropriate button or e-product name from the result screen. Clicking a button or e-product name opens the record in the active instance. Right-clicking the button or e-product name displays a list of instances in which the e-product exists. If the e-product is active in the instance, the green active icon will display next to the instance abbreviation in the list. To navigate to the e-product in a different instance, right-click the instance abbreviation. The e-product opens in edit or read-only mode, according to the user's privileges for the instance. All instances included in a search appear in the navigation menu. The active instance displays first and all other instances display in alphabetical order. The center appears in the navigation menu unless the search uses the **Managed locally** filter.

When you navigate to a record in a different instance, a pop-up window informs you that the instance you are working in has changed. The window can be de-activated for the remainder of the session.

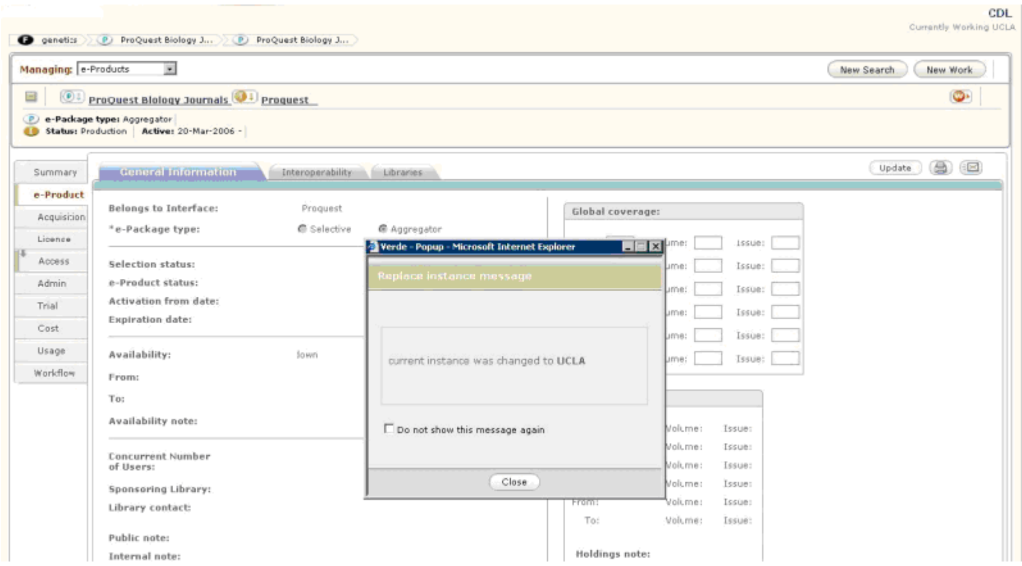

Figure 211: Navigation

In addition to the pop-up alert, the Verde banner changes so that both the name of the default instance and the record's instance display.

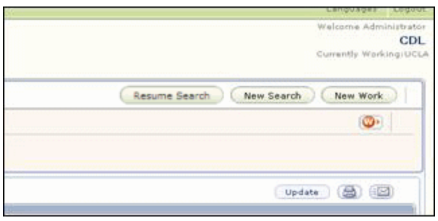

Figure 212: Name of Default Instance and Record's Instance

If a user has write permission for records in instances other than the default instance, when changes are submitted, a pop-up will inform the user that changes are being made to records that are not in the user's default instance. This message can be disabled.

NOTE:

When you navigate from your active instance, only the KB Manager e-product management area of another instance is visible. Other areas of other instances are not accessible. You cannot view the Organization or Library areas, or the KB Tools or Verde Tasks modules, of other instances.

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Merged View

This section includes:

- e-Product Brief Summary on page 593
- e-Product Summary Tab on page 594
- Viewing Merged Data in the e-Package and e-Interface Lists on page 595

Within a shared consortia environment, there are e-product attributes, such as acquisitions and license that are managed centrally for all members. However, there are e-product attributes, such as usage and access that are managed locally. In order to facilitate this, it is important to enable users to view data from the e-product in the center while working on the local attributes. The merged data is shown in two areas: in the e-product brief summary and in the Summary tab. In addition, merged data can be viewed in the e-product and e-interface lists.

e-Product Brief Summary

The e-product brief summary is available to you in member instances at all times, regardless of your user privileges. The summary line is displayed only if an e-product is managed in the center for the instance itself.

A single line has been added to the brief summary. It includes the following fields from the e-product in the center:

- e-Product status
- Selection status
- Active from date + Expiration date – if present
- Coverage text (coverage + embargo) – if present
- Availability – if present
- Acquisition status

- License status

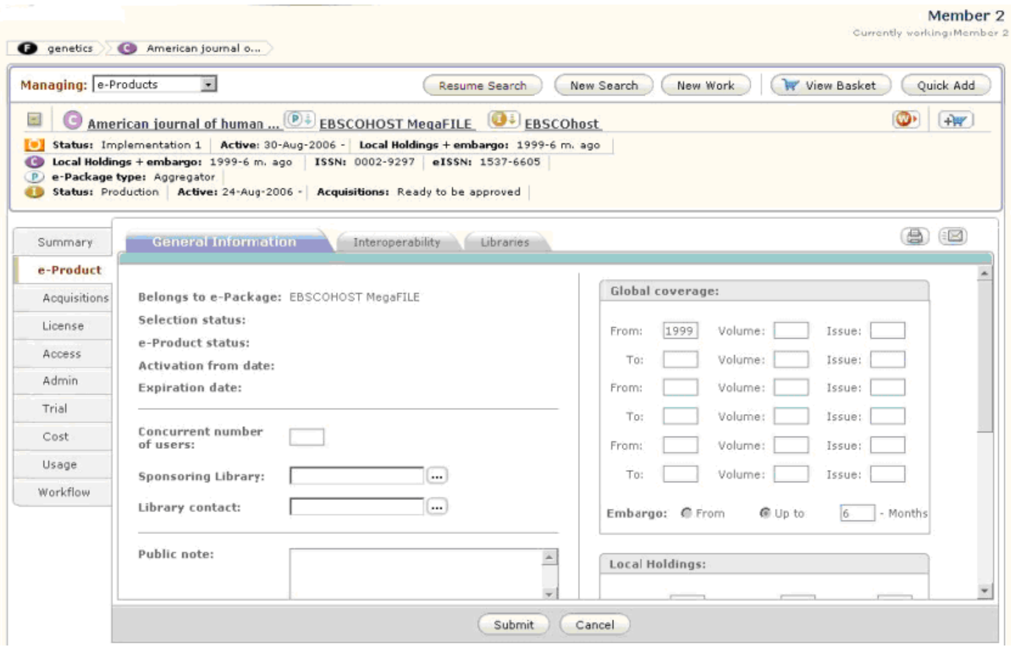


Figure 213: Merged View – e-Product Brief Summary

e-Product Summary Tab

The merged view in the e-product **Summary** tab is available to you in member instances for all e-products. The information is shown in the following sections: e-Product and Work Information, e-Product Information, Libraries, Acquisitions, Admin, Trial, and Workflow. All of the sections except the first are divided into two parts: **Local** and **Center**, where Local shows the data from the local (active) instance and Center shows the data from the central instance.

Most of fields in the first section contain values that cannot be configured and are therefore the same in all instances. These are Title, Global coverage, e-Product type, Interface, and free fields. All other sections contain fields from the e-product that are configurable and the values can therefore be different in different instances. These sections are divided into two columns to show information from the local (active) instance and from the central instance. The Library section displays only active libraries for the local instance.

The **Summary** tab includes several data types—text, icons, and links. The text is displayed regardless of your user permissions. However, linking to attributes is available only to users with appropriate privileges. For example, linking to a license will be available only to a user with view license privileges.

Figure 214: Merged View – e-Product Summary Tab

The Summary page is configurable. For more information, see **Configuring the e-Product Summary** on page **556**.

Viewing Merged Data in the e-Package and e-Interface Lists

The e-package and e-interface lists can be modified to display e-product and selection statuses from both the local (active) instance and central instance. Once the e-package and e-interface lists have been properly configured (contact your Implementation or Support representative for details), the **Holdings** column appears in these lists instead of the **Selection Status** and **e-Product Status** columns. If an e-product is managed locally by an active instance, the instance name appears with an (L) and the e-product/selection statuses following this (if presented). If an e-product is managed by the center for an active instance, the instance name appears with a (C) and the e-product/selection statuses follow this (if presented).

The following illustration shows merged data in the e-product list:

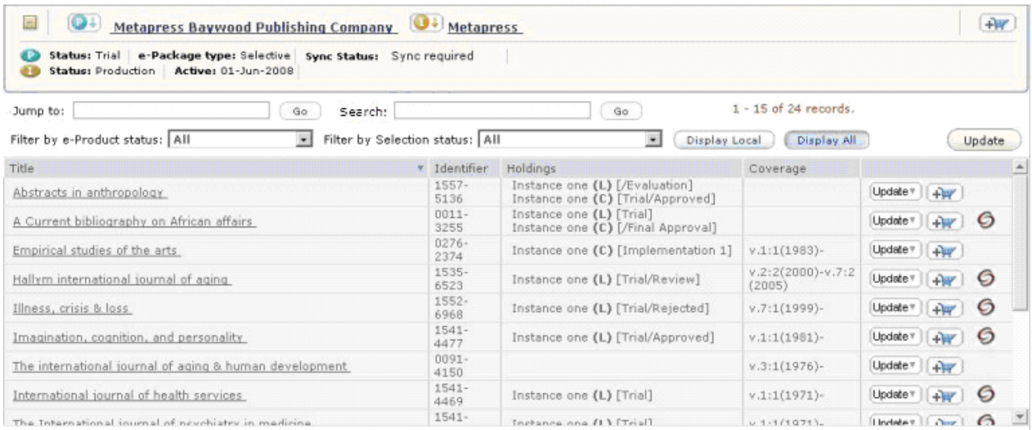


Figure 215: e-Package List – Merged Data

The following illustration shows merged data in the e-interface list:

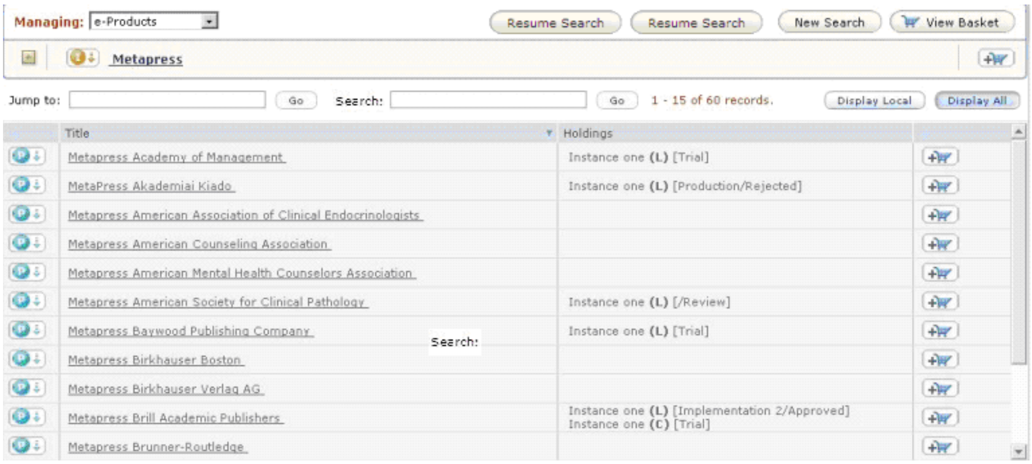


Figure 216: e-Interface List – Merged Data

Part VIII

Interoperability

Part VIII contains the following:

- **Section 51: Introducing Verde Interoperability** on page **599**
- **Section 52: Synchronizing e-Product Updates with SFX** on page **613**

51

Introducing Verde Interoperability

This section includes:

- **About Verde Interoperability** on page **599**
- **Verde KB Manager – Usage Statistics Service Interoperability** on page **600**
- **Verde-SFX Interoperability** on page **606**

About Verde Interoperability

Verde can interoperate with other applications, such as SFX, Aleph, Usage Statistics Service (UStat), and Voyager. Verde serves as a single point of maintenance for e-resource data that is shared by a library's suite of automation tools. It is intended to facilitate collection management decisions by providing information about the size and composition of the current collection, including data on the price of resources already in the collection.

Although Verde has no full acquisitions module, it can store acquisition information (order- and vendor-related details, invoices, price sharing) that can be updated from Aleph via standard batch processes. At the same time, Verde can trigger certain actions in Aleph. For more information about Verde-Aleph interoperability, refer to the *Verde-Aleph Interoperability Guide*.

Verde can also display acquisition information (order- and vendor-related details, invoices, price sharing) that is stored in Voyager. For more information about Voyager-Verde interoperability, refer to the *Verde-Voyager Interoperability Setup Guide*.

This section contains information on Verde-UStat interoperability (**Verde KB Manager – Usage Statistics Service Interoperability** on page **600**). UStat collects and reports the usage statistics information supplied by vendors (content providers) in COUNTER format. This helps librarians to analyze and understand usage within their institutions or corporations. For more information about UStat, see the *UStat User's Guide*.

This section also contains information onVerde-SFX interoperability and describes in detail the process of synchronizing e-product updates with SFX (**Verde-SFX Interoperability** on page **606**). For information on setting up Verde-SFX interoperability, refer to the *Verde-SFX Interoperability Setup Guide*.

Verde KB Manager – Usage Statistics Service Interoperability

This section describes:

- **Verde KB Manager – Usage Statistics Service Interoperability Registration**
- **Navigating to Verde KB Manager from the Usage Statistics Service** on page **601**
- **Navigating to the Usage Statistics Service from the Verde KB Manager** on page **603**

Verde KB Manager – Usage Statistics Service Interoperability Registration

The Verde KB Manager can be configured to interact with the Usage Statistics Service.

To configure the KB Manager to interact with the Usage Statistics Service:

1 Complete registration in the Usage Statistics Service by completing the self-registration process. For details, refer to the *UStat User's Guide*.

If you work in a consortia, define the instances for which you want to use the Usage Statistics Service. Ex Libris recommends that you define only those instances that work with statistics data, such as receive COUNTER statistics data, from vendors.

Registration results are as follows:

- The Usage Statistics Service creates an Owner for each required Verde instance. For a single Verde instance, one Owner is created. For consortia, a number of Owners may be created, according to your request.
- The Usage Statistics Service creates two users: an administrator and a read-only user for each Owner. The administrator has a full set of privileges. The read-only user can run reports but has no access to the Administration module.

NOTE:
Ex Libris recommends that you use a read-only user for navigation from the Verde KB Manager to the Usage Statistics module and an administrator user for working with the Usage Statistics module directly.

- When the Owner and two users are created, you receive two e-mail notifications with the following details:
  - the user names for two users
  - the passwords for two users

2 Define the Usage Statistics Service in Verde.

  a Open the Verde Admin module and select the **Configuration** tab.

  b Select **External Services** and click **Add New Service**.

  c Select the Usage Statistics Service application. The server name (verde-usage1.hosted.exlibrisgroup.com) and port (8801) are already defined.

  d Click **Next** and insert the user name and password of the read-only user.

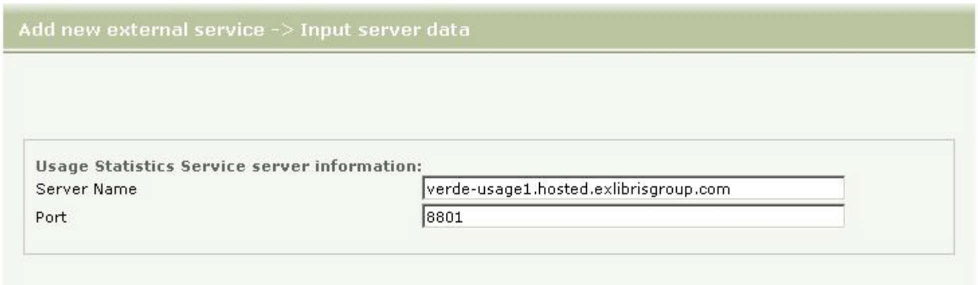


Figure 217: Usage Statistics Service Server Information

Navigating to Verde KB Manager from the Usage Statistics Service

Once the Verde connection details are defined for the Usage Statistics Service user (see Step 1 on page 600), the link to the Verde KB Manager displays in the Usage Statistics for Journal report. See Figure 218.

Click the link to display the Verde login page and log in to Verde.

NOTES:

- If you are using Internet Explorer 6, or Firefox versions 2 or 3, a Verde session opens in a new window each time you click the **Go to KB Manager** link.
- Internet Exlorer 6, SP 1 is not supported for the Usage Statistics Service.

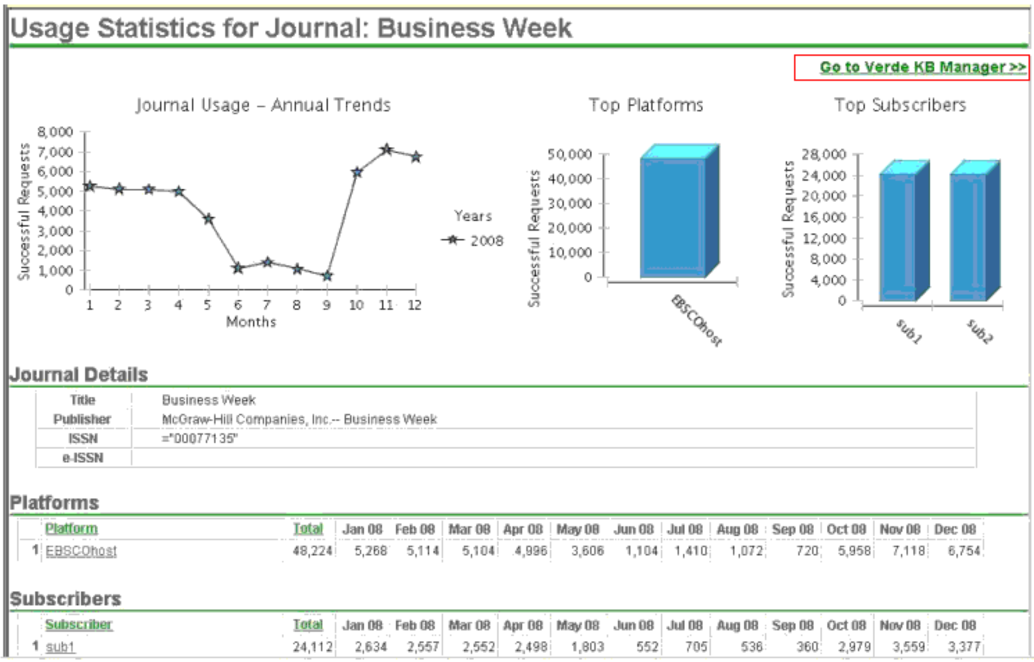


Figure 218: Verde KB Manager Navigation

Immediately after logging in, search results are displayed with the e-products that match the journal or the database.

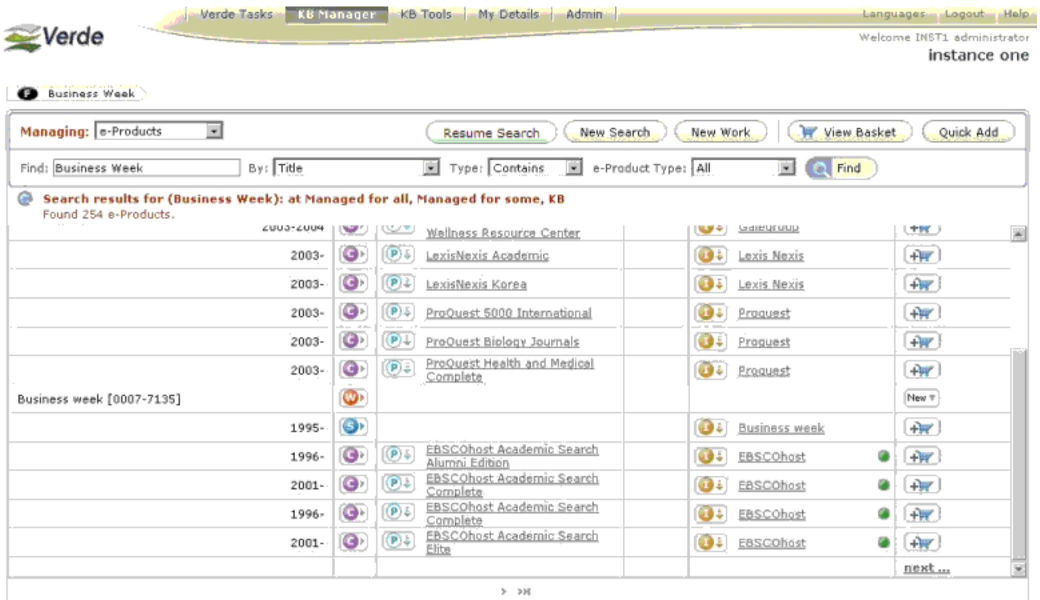


Figure 219: Example of e-Product Matches

The search in Verde is performed as follows:

- Verde first searches for the e-ISSN by identifier.

- If no results are found, Verde searches for the ISSN by identifier.
- If no results are found, Verde searches by title.

The following search filters are used:

- Single instance – A find local search is performed.
- Consortium – A search is performed according to the search profile of the user that is logged in. If there is no search profile defined for the user, the default search is performed.

For details, see the Web services documentation on EL Commons (http://www.exlibrisgroup.org).

Navigating to the Usage Statistics Service from the Verde KB Manager

Once the Usage Statistics Service connection details are defined in Verde (see Step 2 on page 601), the **Find Work Usage Statistics** button displays in the brief summary area of the e-product, next to the work record icon.

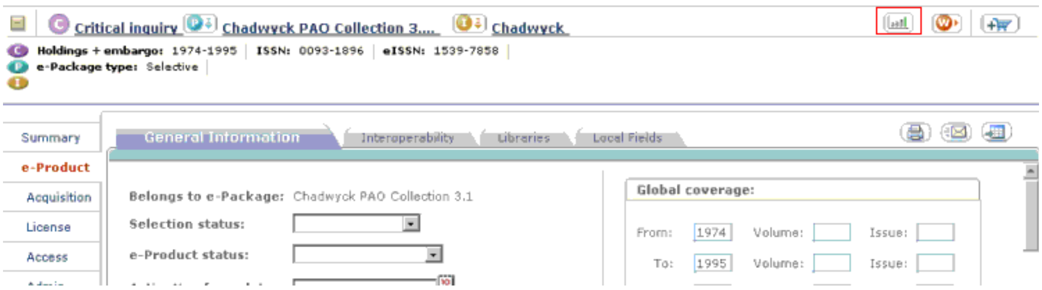


Figure 220: Link to Usage Statistics Service

Clicking this button opens the Usage Statistics Service session for the user defined in Verde Admin > Configuration > External Services. If the user name and/or password of this user are incorrect, the Usage Statistics Logon page is displayed. Once logon is performed, the Usage Statistics Search Results for Work report is displayed. The report retrieves usage statistics data that exists for the work record in the Usage Statistics Service database.

Matching is performed according to the bibliographic data retrieved from the Verde work record. There is no matching on the e-product level.

For example, the Critical Inquiry journal is provided as part of different packages by different interfaces (platforms), such as Chadwyck, EBSCOHost, Galegroup, OCLC, and so forth. There are more than 30 e-constituents connected to the same Critical Inquiry journal work record. The same report is generated for each one of the e-constituents because the matching is performed on work record data.

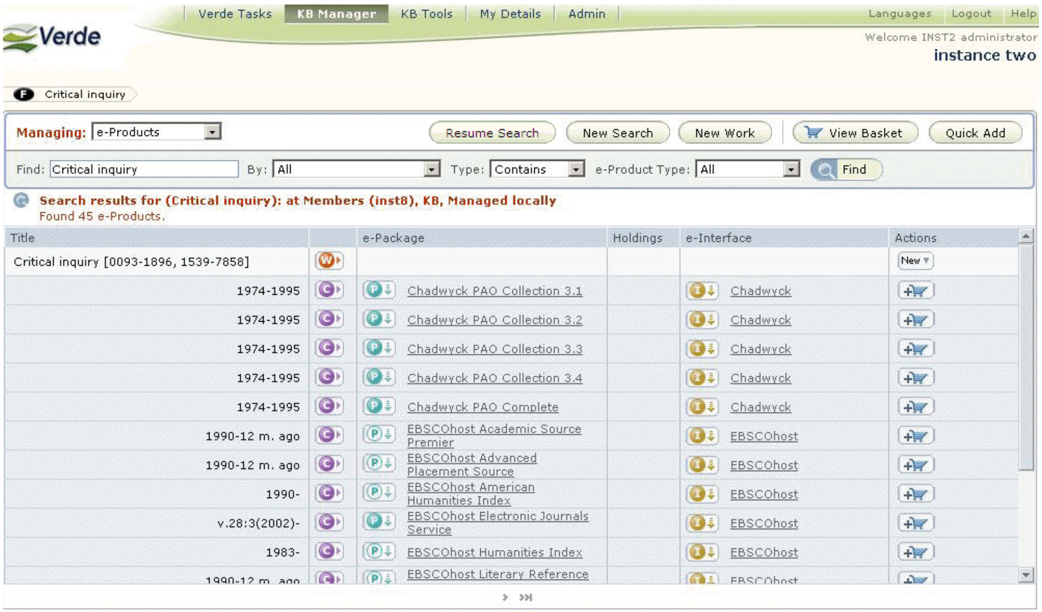


Figure 221: Critical Inquiry Journal Search Results

The Usage Statistics Search Results for Work report is created for e-journals and databases. In Verde, e-journals and databases are represented by e-constituents and/or e-standalones that connect to work records without an ISBN or e-ISBN.

To retrieve the report:

1 Open your Verde installation.

2 Search for a desired journal.

3 Open the e-product.

4 Click the **Find Work Usage Statistics** button next to the work record icon.

NOTE:

The Find Work Usage Statistics icon does not display if the work record is related to the e-interface or e-package, or if the work record has an ISBN/ISBN.

5 The Usage Statistics Search Results for Work report is created. See **Figure 222**.

The report summarizes all existing usage statistics data for a specific title for all years.


Showing page 1 of 1 Go to page:

Usage Statistics Search Results for Work

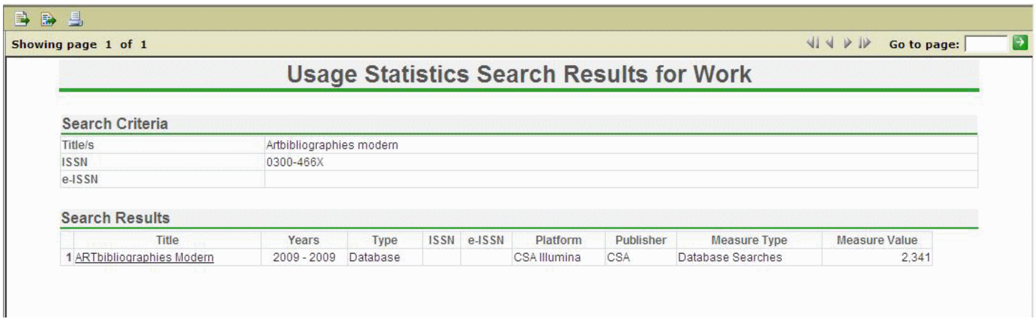
Search Criteria

Title/s	The American journal of sociology AJS AMERICAN JOURNAL OF SOCIOLOGY AM J SOCIOL
ISSN	0002-9602
e-ISSN	1537-5390

Search Results

	Title	Years	Type	ISSN	e-ISSN	Platform	Publisher	Measure Type	Measure Value
1	American Journal of Sociology	2008 - 2009	Journal	0002-9602	1537-5390	EBSCO	The University of Chicago Press	Journal Successful Requests	175
2	American Journal of Sociology	2008 - 2008	Journal	0002-9602	1537-5390	UCHICAGO	The University of Chicago Press	Journal Successful Requests	34

Figure 222: Usage Statistics Search Results for Work Report - Journal Example


Showing page 1 of 1 Go to page:

Usage Statistics Search Results for Work

Search Criteria

Title/s	Artbibliographies modern
ISSN	0300-466X
e-ISSN	

Search Results

	Title	Years	Type	ISSN	e-ISSN	Platform	Publisher	Measure Type	Measure Value
1	ARTbibliographies Modern	2009 - 2009	Database			CSA Illumina	CSA	Database Searches	2,341

Figure 223: Usage Statistics Search Results for Work Report - Database Example

NOTE:

As with all Usage Statistics reports, the Usage Statistics Search Results for Work report is based only on data loaded per Owner.

The Search Criteria section (see **Figure 223**) shows data from the Verde work expression that was used for identifying the related item, such as the following:

- Title – All titles existing in the Verde work record are used for the search. In addition to the main title, it may be display title, abbreviated title, alternate title, and subtitle.
- ISSN
- e-ISSN

The Search Results table in **Figure 223** includes journals that the report identified as a match according to one or more of the search criteria. The table includes the following information:

- Title of the journal or the database
- Years – The years for which usage statistics data exists
- Type – There are two possible values: journal or database
- Journal ISSN
- Journal e-ISSN
- Platform that provides the journal or the database
- Publisher that issues the journal or the database
- Measure type – There are two possible values: journal successful requests or database searches
- Measure Value – The number of journal successful requests or the number of database searches

The data is sorted alphabetically by title, platform, and publisher.

It is possible that the report retrieves more than one journal or database according to the search criteria. To see usage statistics for a specific journal or database, click the title. The Usage Statistics for Specific Journal or Usage Statistics for Specific Database report (see the *UStat User's Guide* for details) is created. If the usage statistics for a journal or database is presented for more than one year, the report will be created for the latest year. To see reports for previous years, change the start date in the report filter.

Verde-SFX Interoperability

Verde and SFX communicate with each other in a number of different ways in order to provide the following functionality:

- Transfer locally created Verde e-product and work records to SFX
- Activation/deactivation – When an e-product of type e-constituent, e-package, or e-standalone is activated or deactivated in Verde, an update is sent to SFX.
- Update coverage – When the local coverage of an e-product of type e-standalone, e-package, or e-constituent is updated, an update is sent to SFX.
- Update embargo – When the local embargo is updated on an e-standalone or e-constituent, the data is sent to SFX.
- Update active libraries – When the list of active libraries is changed, Verde sends the data to SFX. Verde can update only SFX institutes; it does not update SFX groups.

- Update availability status – If an e-product is flagged as temporarily unavailable in Verde, SFX status is updated to down. SFX is updated when the e-product becomes available again. This functionality is available for e-standalones and e-packages.

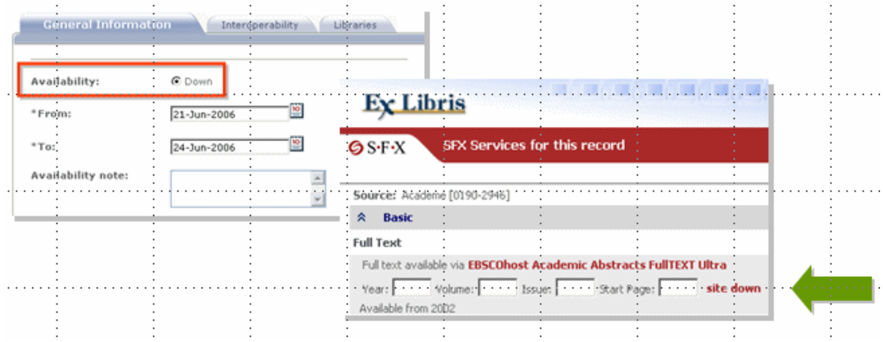


Figure 224: Availability Status

- Get license data – Verde sends SFX license and administrative information about an e-product to be displayed in the SFX menu.

  For example, active portfolios with getFullText services have a link to Verde. Click the **I** button to open an information window, which displays active license details as well as general information from Verde.

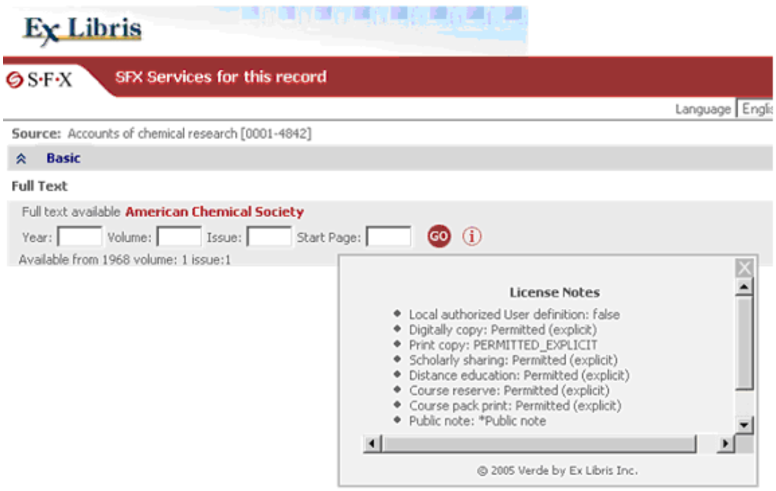


Figure 225: Active License Details and General Information

The information is divided into two sections: **License Notes** and **General Notes**.

The **License Notes** section contains the following information from the license record (for the values that are defined in the record):

- Authorized user definition
- Local authorized user definition

   - Citation requirement detail
   - Digital copy
   - Digital copy term note
   - Print copy
   - Print copy term note
   - Scholarly sharing
   - Scholarly sharing term note
   - Distance education
   - Distance education digitally term note
   - Course reserve print
   - Electronic link term note
   - Course pack print
   - Course pack term note
   - Walk-in term use note
   - Public note
   - ILL print of fax
   - ILL secure electronic transmission
   - ILL electronic
   - ILL record keeping required
   - ILL term note

   The **General Notes** section contains the following information from the e-product and e-product admin records (for the values that are defined in the record):

   - Hardware requirements – public
   - Software requirements – public
   - Maintenance window value
   - Provider system status uniform resource indicator
   - User documentation
   - Public note

- Display U/P – Verde displays U/P data from SFX as part of the Verde access record.
- Deep linking – Users can deep link from the Verde e-product record to the SFX object portfolio or target service record. The deep link is available from the e-Product **Interoperability** tab and is accessed by clicking the **SFX**

button that is displayed next to the SFX ID. Note that deep linking works only if the SFX ID is valid and exists in your SFX database and if the Verde-SFX link is set. The first time that you deep link during a session you have to log in; thereafter, your user name and password are remembered.

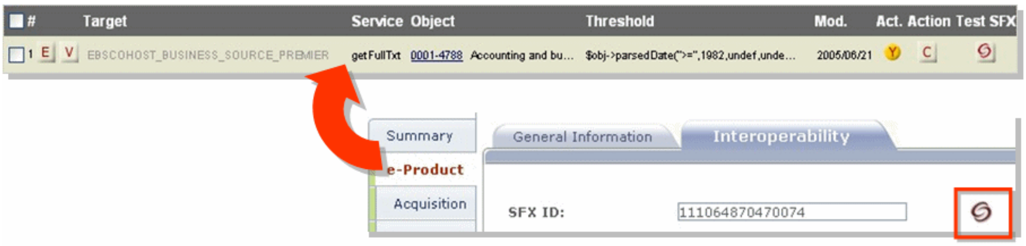


Figure 226: Deep Link from Verde e-Product Record

- Link to resource – Verde provides access to an SFX menu displaying the electronic full-text service for an active e-constituent from the results screen, from the package list, and from the e-product summary screen. It is available for active e-products only.

Figure 227: Linking to an Active Resource

Part IX

Appendixes

Part IX contains the following:

- **Section A: Indexing** on page **613**
- **Section B: Explanation of Fields** on page **617**
- **Section C: Support for Chinese, Japanese, and Korean** on page **635**
- **Section D: Using UTIL V/12 to Re-index the Verde Database** on page **639**

A

Indexing

Searching e-products in the KB Manager is possible for a number of defined indexes. These indexes are built from fields in the e-product record.

e-Product

Table 95. e-Product Indexing

Field	Entity	Tag List	Searchable By
e-Product code	e-product	WVI	Verde identifier
e-Product type	e-product	WRD	All Possible values are: ■ econstituent ■ estandalone ■ interface ■ package ■ eprint
e-Product status	e-product	WRD,WES	All, Status
Selection status	e-product	WRD,WES	All, Status
Activity status	e-product	WRD,WES	All, Status
SFX ID of e-product	e-product	WVI	Verde identifier
MetaLib ID	e-product	WVI	Verde identifier
Additional ID Number, Additional ID Source	e-product	WAI	Additional identifier
Library contact	e-product	WCO	Contact

Table 95. e-Product Indexing

Field	Entity	Tag List	Searchable By
Sponsoring Library	e-product	WSL	Sponsoring library
Package Type	e-product	WRD	All Possible values are: ■ aggregator ■ selective
JKEY	e-product	WID	Identifier
Acquisition number, acquisition code	acquisition	WAC	Acquisitions code
Acquisition Status	acquisition	WRD, WAS	All, Acquisition status
Purchase Order Number	acquisition	WPN	Purchase order number
Budget	acquisition	WRD	All
Institute Code	local acquisition	WCL	Contributing library
License Code, License Name	license	WLN	License code/name
License Status	license	WRD,WLS	All, License status
Licensor, Original Licensor, Licensing Agent	license	WOR	Organization
Trial code	trial	WVI	Verde identifier
Trial status	trial	WRD,WES	All, Status
Organization Code	organization	WOR	Organization

Work

MARC sub-fields and MARC tags can be updated in the Work table. These fields are indexed and used in searches. They are described in the following table.

Table 96. Work Table Indexing

Tag Value	Tag Label	Searchable By
010	LCCN	All, Identifier
020	ISBN	Identifier
022	ISSN	Identifier
030	CODEN	All, Identifier
090	SFX ID	All, Verde Identifier
098	MetaLib ID	All, Verde Identifier
100	Author	All, Organization
110	Corporate Author	All, Organization
210	Abbreviated Title	All, Title
245	Title	All, Title,
249	Display Title	All, Title
260	Imprint	All
310	Update Frequency	All
500	Coverage Note	All
520	Description	All,
540	Copyright	All
546	Language	All
650	Category	All, Category
655	e-Product Type	All
659	e-Product Format	All
776	eISSN/Eisbn	Identifier
780	Continues	All, Title
785	Continued By	All, Title

Table 96. Work Table Indexing

Tag Value	Tag Label	Searchable By
900-908	Local 1 -9	All, Local fields
969	Local Category	All, Local fields, Category, Local Category

B

Explanation of Fields

This section includes:

- **Acquisition Fields** on page **617**
- **License Fields** on page **621**

Acquisition Fields

Table 97. Acquisition Fields

Code	Data Element Name	Definition
ACQUISITIONCODE	Acquisition Identifier	The identification number assigned to the Acquisition by the electronic resource management system
ACQUISITIONMETHOD	Method	Method of acquisition
ACQUISITIONNUMBER	Acquisition Number	The acquisitions number
ACQUISITIONSTATUS		The status of the acquisition record
ACQUISITIONSTATUSDATE	Acquisition Status Date	The date that the acquisition status was assigned
ADVANCENOTICEDATE	Advance Notice Date	Calculated by the system based on the advance notification period and the acquisition end date.
AUTORENEWAL	Renewal Type	A clause which specifies whether renewal is automatic or explicit

Table 97. Acquisition Fields

Code	Data Element Name	Definition
BUDGETS	Budgets	The names of the budgets or funds that is paying for the subscription.
CONCURRENTUSERSNOTE	Concurrent User Note	■ A specific explanation of how users are allocated or shared if pooled or platform-based ■ Additional information about the number of concurrent users
CONSORTIALAGREEMENT	Consortial Agreement Indicator	Indicates whether an acquisition falls under a multiparty agreement that uses the same license for all parties
CREATEEDBY	Created By	Verde user
CREATIONDATE	Created Date	Date of creation
CURRENCY	Currency	The acquisition payment currency. Default value is U.S.D. The default can be changed using the Codes section of the Admin module
DISCOUNTONPRICE	Discount on Price	A discount in price or in pricing formula
ILSSUBSCRIPTIONNO	ILS Subscription No.	The Subscription number in the ILS
INFLATIONRATE	Inflation Rate	The inflation rate (defined in percentage terms).
INSTANCECODE	Instance code	The instance code (logical identifier of an instance) where acquisition record was created.
LISTPRICE	List price	Publishers list price
MATERIALTYPE	Material Type	Material Type
NETPRICE	Net price	Net price of the order
NOTEFORILS	Note for ILS	Note for ILS

Table 97. Acquisition Fields

Code	Data Element Name	Definition
NOTEFORVENDOR	Note for Vendor	Note to be included in correspondence with vendor
NOTICEPERIODCODE	Notice Period Code	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record
NUMBEROFCOPIES	Number of Copies	Number of copies (related only to e-print)
POOLEDCONCURRENTUSERS	Pooled Concurrent Users	The number of concurrent users if shared across a consortium rather than within a specific institution
ORDERDATE	Order date	The start date of the first subscription
ORDERSENDMETHOD	Order Send Method	Not displayed in UI. Method by which the letter is sent. The information is received from Aleph (order delivery type).
POOLEDCONCURRENTUSERS	Pooled concurrent users	The number of concurrent users if shared across a consortium rather than within a specific institution. This number may be spread across one or more e-products.
PRICE	Price	The amount paid for the product
PRICENOTE	Price note	Note field that contains additional information regarding the subscription price.
PRICINGCAP	Price Cap	The maximum percentage of annual increase in a multi-year agreement
PRICINGCAPFROM	Pricing Cap From	Dates on which the price cap begins
PRICINGCAPTO	Pricing Cap To	Dates on which the price cap ends

Table 97. Acquisition Fields

Code	Data Element Name	Definition
PRICINGMODEL	Pricing Model	A description of the fee structure applicable to the product
PRINTCANCELNOTE	Print Cancellation Note	Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license
PRINTCANCELRESTRICTION	Print Cancellation Restriction Indicator	Any restriction(s) on canceling print versions of electronic titles covered by a license
PRINTPURCHASEORDERNO	Print Purchase Order No	Pointer to an acquisition record in another system
PURCHASEORDERNO	Purchase Order Number	The number assigned to the purchase order of a product
RENEWCANCDATE	Purchase Renewal Date	The date on which the subscription expires if it is not renewed
RENEWCANCDESCISIONNOTE	Renew Cancellation Decision Note	The reason for canceling or renewing the subscription
RENEWCANCNOTEILS	Renew Cancellation Note ILS	Renew cancellation note to send to the ILS
RENEWCANCNOTEVENDOR	Renew Cancellation Note Vendor	Renew cancellation note to send to the vendor
SUBSCRIPTIONNOTIFICATION	Advanced notification	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record.
SUBSCRIPTIONTYPE	Subscription Type	Subscription Type
SUBSCRIPTIONTYPENOTE	Subscription Type Note	Subscription Type Note
UPDATEDATE	Update date	Acquisitions update date
UPDATEDBY	Updated by	Verde User that updated the acquisition record.
VENDORCODE	Vendor Code	Vendor Code

Table 97. Acquisition Fields

Code	Data Element Name	Definition
VENDORSUBSCRIPTIONCODE	Vendor Subscription Code	The ID of the Vendor Subscription

License Fields

Table 98. License Fields

Code	Data Element Name	Definition
ACCESSABILITYCOMPLIANCE	Accessibility Compliance Indicator	An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation
ALLRIGHTSRESERVEDCODE	All Rights Reserved Indicator	A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor
APPLICABLECOPYRIGHTLAW	Applicable Copyright Law	A clause that specifies the national copyright law agreed to in the contract
ARCHIVINGFORMATCODE	Archiving Format	The format of the archival content
ARCHIVINGNOTE	Archiving Note	Additional information related to archiving rights, product, and format
ARCHIVINGRIGHTSCODE	Archiving Right	The right to permanently retain an electronic copy of the licensed materials
CITATIONREQUIREMENTDETAILS	Citation Requirement Detail	A specification of the required or recommended form of citation

Table 98. License Fields

Code	Data Element Name	Definition
CLICKWRAPMODIFICATION	Click-wrap Modification Clause Indicator	A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement, or terms of use residing on the provider's server that might otherwise function as a contract of adhesion
COMPLETENESSOFCONTENTCODE	Completeness of Content Clause Indicator	The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the print equivalent
CONCURRENCYWITHPRINTCODE	Concurrency with Print Version Clause Indicator	The presence of a provision in the contract which states that the licensed materials is available before, or no later than the print equivalent, and/or is kept current
CONFDTYOFAGREEMENT	Confidentiality of Agreement	The presence or absence of clauses that specify or detail restrictions on the sharing of the terms of the license agreement
CONFDTYOFAGREEMENTNOTE	Confidentiality of Agreement Note	Specific details about what aspects of the license are private
CONFIDENTIALITYOFUSER	Confidentiality of User Information Indicator	The requirement that user data should not be shared with third parties, reused or resold without permission

Table 98. License Fields

Code	Data Element Name	Definition
CONTENTWARRENTY	Content Warranty	A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the resource is materially diminished.
COURSEPACKELECTRONICCODE	Course Pack Electronic	The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction
COURSEPACKPRINTCODE	Course Pack Print	The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction
COURSEPACKTERMNOTE	Course Pack Term Note	Information which qualifies a permissions statement on Course Packs
COURSERESERVEELCORCASHCODE	Course Reserve Electronic / Cached Copy	The right to make electronic copies of the licensed materials and store them on a secure network
COURSERESERVEPRINTCODE	Course Reserve Print	The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction

Table 98. License Fields

Code	Data Element Name	Definition
COURSERESERVETERMNOTE	Course Reserve Term Note	Information which qualifies a permissions statement on Course Reserves
CREATEDBY	Created By	Verde user
CREATEDDATE	Created Date	Date of creation
CUREPERIODFORBREACH	Cure Period for Breach	The cure period for an alleged material breach
CUREPERIODFORBREACHUOMCODE	Cure Period for Breach Unit of Measure	The time interval that measures the Cure Period for Breach
DBPROTECTIONOVERRIDECODE	Database Protection Override Clause Indicator	A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law
DELIVERYREQUIREMENTS	License Delivery Instructions	The required medium in which official communications must be delivered
DIGITALCOPYCODE	Digitally Copy	The right of the licensee and authorized users to download and digitally copy a reasonable portion of the licensed materials
DIGITALCOPYTERMNOTE	Digitally Copy Term Note	Information which qualifies a permissions statement on digital copy
DISTANCEEDUCATION	Distance Education	The right to use licensed materials in distance education

Table 98. License Fields

Code	Data Element Name	Definition
DISTANCEEDUCATIONTERMNOTE	Distance Education Term Note	Information which qualifies a permissions statement on distance education
ELECTRONICLINKCODE	Electronic Link	The right to link to the licensed material
ELECTRONICLINKTERMNOTE	Electronic Link Term Note	Information which qualifies a permissions statement on Electronic Links
ENDDATE	End Date	The end date of the license
EXECUTIONDATE	License execution date	Date on which the license was executed.
FAIRUSECLAUSECODE	Fair Use Clause Indicator	A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section 107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law
FILELOCATION	Electronic File Location	The path where electronic version of license is stored
GENERALTERMSNOTE	Terms Note	Notes about the terms in the business agreement of the license as a whole
GOVERNINGJURISDICTION	Governing Jurisdiction	The venue or jurisdiction to be used in the event of an alleged breach of the agreement

Table 98. License Fields

Code	Data Element Name	Definition
GOVERNINGLAW	Governing Law	A clause specifying the governing law to be used in the event of an alleged breach of the agreement
INDEMNIFICATION	Indemnification by Licensee Clause Indicator	A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee
INDEMNIFICATIONCODE	Indemnification by Licensor Clause	A clause by which the licensor agrees to indemnify the licensee against a legal claim
INTELLECTUALPROPWARRENTY	Intellectual Property Warranty Indicator	A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties
INTRLIBELECTRONICCODE	Interlibrary Loan Electronic	The right to provide the licensed materials via interlibrary loan by way of electronic copies
INTRLIBKEEPINGREQUIREDCODE	Interlibrary Loan Record Keeping Required Indicator	The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request
INTRLIBPRINTORFAXCODE	Interlibrary Loan Print Or Fax	The right to provide the licensed materials via interlibrary loan by way of print copies or facsimile transmission

Table 98. License Fields

Code	Data Element Name	Definition
INTRLIBSECURETRANSCODE	Interlibrary Loan Secure Electronic Transmission	The right to provide the licensed materials via interlibrary loan by way of secure electronic transmission
INTRLIBTERMNOTE	Interlibrary Loan Term Note	Additional information related to interlibrary loan
LICENSEDURATION	License Duration	The period of time covered by the license agreement – a number
LICENSEDURATIONVAL	License Duration Value	The period of time covered by the license agreement – a value – for example, year
LICENSEE	Licensee	■ One to whom a license is granted ■ The legal party who signs or otherwise assents to the license
LICENSEENOTICEPERIODOFTRMN	Licensee Notice Period for Termination Unit of Measure	The time interval in which the Licensee Notice Period for Termination by the library is measured
LICENSEENOTICEPERIODOFTRMNCODE	Licensee Notice Period for Termination	The amount of advance notice required prior to contract termination by the Licensee
LICENSEETERMINATIONRIGHTS	Licensee Termination Right Indicator	The ability of the licensee to terminate an acquisition during a contract period
LICENSEETRMNCONDITIONCODE	Licensee Termination Condition	The conditions that would allow a licensee to terminate acquisition during a contract period
LICENSENAME	License Name	The locally-assigned name of the license agreement

Table 98. License Fields

Code	Data Element Name	Definition
LICENSEURI	License Uniform Resource Identifier	The URI at which the license agreement is made available
LICENSEURITYPE	License Uniform Resource Identifier Type	The type of URI being used to locate the license agreement
LICENSINGAGENT	Licensing Agent	An organization (such as a subscription agent) or an individual that facilitates a licensing transaction on behalf of one or more parties
LICENSINGNOTE	Licensing Note	Additional information regarding the license, the negotiation of the license, the product, and so on.
LICENSOR	Licensor	■ One who grants a license to another ■ The party who formulates the terms and conditions of use for the product with whom the licensee (purchaser) is bound in contract by signing or otherwise assenting to a license agreement
LICENSORNOTICEPERIODTRM	Licensor Notice Period for Termination	The amount of advance notice required prior to contract termination by the licensor
LICENSORNOTICEPERIODTRMCODE	Licensor Notice Period for Termination Unit of Measure	The time interval in which the Licensor Notice Period for Termination is measured

Table 98. License Fields

Code	Data Element Name	Definition
LICENSORTERMINATIONRIGHTS	Licensor Termination Right Indicator	The ability of a Licensor to terminate an acquisition during a contract period
LICENSORTRMCONDITION	Licensor Termination Condition	The conditions that would allow a Licensor to terminate an acquisition during a contract period
LINKEDLICENSENOTE	Linking Note	Additional information about linking
LOCALLICENSENEGOTIATOR	Local License Negotiator	The name of the local person responsible for negotiating the license
LOCALAUTHORIZESUSERDEF	Local Authorized User Definition Indicator	The inclusion of an institution-specific preferred authorized user definition
LOCALUSEPERMISSION	Local Use Permission	Local use note
MAINTENACEWINDOW	Maintenance Window	The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable
METHODCODE	Method Code	License method
NONRENEWALNOTICECODE	Non-Renewal Notice Period Unit of Measure	The time interval in which the Non-Renewal Notice Period is measured
NONRENEWALNOTICEPERIOD	Non-Renewal Notice Period	The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription

Table 98. License Fields

Code	Data Element Name	Definition
ORIGINALLICENSOR	Original Licensor	The original organization granting the license
PERFORMANCEWARRENTYIND	Performance Warranty Indicator	Indicates whether a clause that requires a satisfactory level of online availability and/ or response time is present
PERPETUALACCESSFROM	Perpetual Access From	The date from which there is perpetual access
PERPETUALACCESSRIGHTS	Perpetual Access Right	The right to permanently access the licensed materials paid for during the period of the license agreement
PERPETUALACCESSTO	Perpetual Access To	The date to which there is perpetual access
PERPETUALHOLDINGSNOTE	Perpetual Holdings Note	Note about perpetual holdings
PHYSICALLOCATION	Physical License Location	The place where a printed or other tangible instance of the license is stored
PRINTCOPY	Print Copy	The right of the licensee and authorized users to print a portion of the licensed materials
PRINTCOPYTERMNOTE	Print Copy Term Note	Information which qualifies a permissions statement on Print Copy
PUBLICNOTE	Public Note	Additional information regarding the resource that is intended for public use

Table 98. License Fields

Code	Data Element Name	Definition
REMOTEACCESSCODE	Remote Access	The right of an authorized user to gain access to an Electronic Product from an offsite location
RENEWALDATE	Renewal Date	Date of renewal
RENEWALTYPECODE	Renewal Type	A clause which specifies whether renewal is automatic or explicit
REPLACEDBY	Replaced By	License code of later license
REPLACES	Replaces	License code of earlier license
SCHOLARYSHARING	Scholarly Sharing	The right of authorized users and/or the licensee to transmit hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific or professional use
SCHOLARYSHARINGNOTE	Scholarly Sharing Term Note	Information which qualifies a permissions statement on Scholarly Sharing
STARTDATE	Start Date	The start date of the license

Table 98. License Fields

Code	Data Element Name	Definition
STATUSCODE	License status	Status of the license. Default values are: **New**, **In negotiation**, **Under review**, **Under local review**, **Pending local response**, **Pending licensor response**, **Awaiting vendor generic license**, **Redacted version created**, **Electronic version created** , **Awaiting local signature**, **Final legal version received**, **Approved**, **Pending final local signature**, **Retired**, **Pending final signature by licensor**, **Approved locally**, **Rejected**. Can be customized by changing the value in the code table
STATUSNOTE	License status note	Note field that contains additional information regarding the license status.
TRMREQUIREMENTNOTE	Termination Requirements Note	A clarification of the termination requirements and what certification of the requirement activities is necessary
TRMRIGHTNOTE	Termination Right Note	Additional information necessary to amplify any specifications of termination rights

Table 98. License Fields

Code	Data Element Name	Definition
TYPECODE	License type	Type of license. Once defined cannot be modified. Default values are: **Regular**, **Trial**, **Supplemental**, **Prevailing**. Can be customized by changing the value in the code table.
UCITAOVERRIDE	UCITA Override Clause Indicator	A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state
UPDATEDATE	Update Date	Date record updated
UPDATEDBY	Updated By	Verde user
USERESTRICTIONSNOTE	Use Restriction Note	Use Restriction Note
VENDORADVANCEDNOTICE	Vendor Advanced Notice	The amount of time before the license expires that you need to cancel your subscription. A number
VENDORADVANCEDNOTICEVAL	Vendor Advanced Notice Value	The amount of time before the license expires that you need to cancel your subscription. A value
WORKINTERMUSENOTE	Walk-in term use note	

C

Support for Chinese, Japanese, and Korean

This section includes:

- Chinese on page 635
- Japanese on page 636
- Korean on page 637

Verde supports the searching and sorting of Chinese and Korean titles. Searching and sorting of Chinese titles includes special search and sort functionality for the Taiwan language zone.

Since Chinese titles may be searched and sorted differently, the language zone should be defined. The sort option is also configurable and may be defined. To enable this feature, contact your Ex Libris Implementation or Support representative.

Chinese

If the language zone is defined as **China**, you can search Chinese titles in simplified Chinese, traditional Chinese, or Pinyin. The search results are sorted according to Pinyin spelling.

If the language zone is defined as **Taiwan**, you can search Chinese titles in traditional Chinese. Search results are sorted according to stroke sequence.

The following is an example of a Chinese title in Verde:

Field	Details	Actions
ISSN	1000-0429	
Abbreviated Title	FOREIGN LANGUAGE TEACHING AND RESEARCH	
Title	外语教学与研究/#/外語教學與研究 [[wai yu jiao xue yu yan jiu]]	
Imprint	Beijing - Shang wu yin shu guan	
Category	Arts and Humanities - Language & Linguistics	
e-Product Type	JOURNAL	
SFX	991042731682612	

Figure 228: Chinese Title

The example contains three title options—Simplified Chinese / #/ Traditional Chinese / [Pinyin]:

外?教学与研究 /#/ 外語教學與研究 [[wai yu jiao xue yu yan jiu]]

If the language zone is defined as **China**, each title option is searchable. You can retrieve the title using the following searches:

外?教学与研究 or 外語教學與研究 or wai yu jiao xue yu yan jiu

If the language zone is defined as **Taiwan**, you can retrieve the title using the following search:

外語教學與研究

Japanese

Japanese titles may include up to two titles—one in Kanji (traditional Japanese) and one in Hiragana/Katakana (alphabetic Japanese). Each title option is searchable. Titles are sorted according to the Hiragana/ Katakana spelling.

The following is an example of a Japanese title in Verde.

Field details:

Field	Details	Actions
ISSN	0911-7237	
Abbreviated Title	THE HIYOSHI REVIEW OF NATURAL SCIENCE KEIO UNIVERSITY	
Title	慶應義塾大学日吉紀要. 自然科学 [[けいおう ぎじゅく だいがく ひよし きよう. しぜん かがく]]	
e-Product Type	JOURNAL	
SFX	110978979266934	

Figure 229: Japanese Title

Korean

Korean titles may include up to two titles—one in Hanja (traditional Chinese) and one in Hangul (alphabetic Korean). Each title option is searchable. Titles are sorted according to the Hangul spelling.

The following is an example of a Korean title in Verde:

Field	Details	Actions
ISSN	1226-7872	
Abbreviated Title	JOURNAL OF THE WIND ENGINEERING INSTITUTE OF KOREA	
Title	한국풍공학회지 [[한국풍공학회지]]	
e-Product Type	JOURNAL	
SFX	1000000000108329	

Figure 230: Korean Title

D

Using UTIL V/12 to Re-index the Verde Database

This section includes:

- **Overview** on page **639**
- **Apply 13-Digit ISBN Handling** on page **640**
- **Start Re-indexing** on page **641**
- **Stop Re-indexing** on page **642**
- **Check the Re-indexing Status** on page **643**

Overview

The Re-index Utility guides you through the different steps required to apply a 13-digit ISBN. The wizard is available through option V/12, **Re-index database**, in the UTIL menu.

NOTES:

- The re-indexing process can take about five days, depending on database size and machine resources.
- It is strongly recommended that you back up the database after the re-indexing process is complete.
- The re-indexing process does not require downtime. All functionality except for searching by an identifier is fully available during the re-indexing process. Performance, however, may be slightly affected.

The main menu includes the following:

1. Apply ISBN 13 handling
2. Start re-indexing
3. Stop re-indexing
4. Check the re-indexing status

Apply 13-Digit ISBN Handling

NOTE:
You must select this option before re-indexing if you want to apply 13-digit ISBN handling.

To apply 13-digit ISBN handling, select option **1** from the main menu. Verde is restarted as follows:

```
Shutdown jboss
-------------------------
sending shutdown signal
monitoring shutdown complete signal
...............done
-------------------------
shutdown java processes
-------------------------
Checking if process Indexing is up
Process Indexing is up
Shutting down process Indexing...
Process Indexing is down
Checking if process Task & Job manager is up
Process Task & Job manager is up
Shutting down process Task & Job manager...
Process Task & Job manager is down
done
-------------------
Starting up jboss
```

```
-------------------
cycling server.log
starting jboss
monitoring startup complete signal
.............................................................
............................done
jboss started
--------------------------
Starting up Task Manager
--------------------------
[1] 22346
-----------------------------
Starting up Indexing Process
-----------------------------
[2] 22347
verde 19781 1 0 2008 ? 01:22:06 rmiregistry 12002
verde 19781 1 0 2008 ? 01:22:06 rmiregistry 12002
```

After Verde restarts, the following message appears:

```
ISBN 13 handling is applied. Enter Y if you want to start re-indexing
now, or Q to quit
```

If you enter `Y`, the re-indexing starts immediately.

Start Re-indexing

To apply 13-digit ISBN handling, select option **2** from the main menu. The following steps are performed:

1. `Step 1 - checking if LKB Update is running...The LKB Update is shut down.`

   Enter `CR` to continue.

2. `Step 2 - Checking disk space...There is enough disk space.`

   Enter `CR` to continue.

3. `Step 3 - Checking if Verde is running...Verde is running.`

   Enter `CR` to continue.

4 `Step 4 - Checking if the indexing process is running...`

The indexing process must first be shut down. Enter `Y` to shut down the indexing process or `Q` to quit.

If you enter Y, the following steps are performed:

```
Checking if process Indexing is up

Process Indexing is up

Shutting down process Indexing...

Process Indexing is down

[1]   + Done                              ./shut_indexing.sh
```

5 `Step 5 - Checking if the re-indexing process is already running...The re-indexing process is not running.`

Enter `CR` to continue.

If the re-indexing process has run, the following message appears:

`Enter S to start re-indexing or C to continue the re-indexing process that was previously stopped.`

NOTE:
If the process is stopped, **C** should be chosen to continue the process and not **S** to start it all over again (unless the database is restored from backup to an earlier stage).

6 `Step 6 - Enter e-mail(s) for notifications (delimited by semicolons)`

`Sending email...`

`1] 23852`

`Starting the re-indexing process.`

Enter CR to continue.

Stop Re-indexing

To stop re-indexing, select option **3** from the main menu. The following process is performed:

```
Stopping the re-indexing process...

Sending email...

The re-indexing process has been stopped.
```

Enter `CR` to continue.

NOTES:

- The fact that the process progresses slowly does not mean that it is stuck. Stopping the process, therefore, is usually unnecessary.
- If Verde or Oracle are shut down during re-indexing, the process can no longer identify the candidates for re-indexing. In this case, an e-mail is sent to Ex Libris from servers on which the above situation occurred. Customers will also receive an e-mail with the following message: "Re-index process has been stopped because of an unexpected error. Please contact Verde Support."

Check the Re-indexing Status

To check the re-indexing status, select option **4** from the main menu. The following options are available:

0. Exit
1. Status of all instances
2. Status of a specific instance

- To view the general status for all instances, select option **1**. You receive a message similar to the following:

  ```
  Checking status, please wait...
  finished re-indexing 76 %.
  ```

  Enter `CR` to continue.

- To view the status of a specific instance, select option **2** and insert the instance code. You receive a message similar to the following:

  ```
  Enter the instance code
  TST
  Checking status, please wait...
  finished re-indexing 8 % of instance tst.
  ```

Enter `CR` to continue.

NOTE:

At the beginning, the process marks the records to be re-indexed. Only after the records have been marked does the re-indexing begin (this is when the status percentage starts to increase). The marking step can easily take more than two hours on large databases, and during this time the status shows 0%. Therefore, when 0% progress is shown, it does not necessarily mean that the process is not progressing. For more information on the process, you may want to refer to the `utilIndexing.log` file under `$VERDE_BASE/home/system/log/` (alias `vclog`), in which various steps of the re-indexing utility are logged.