Licensing Special Interest Group

ELUNA 2017

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1. Introductions
   1. Name, Institution, Role
2. Updates on Licensing Functionality
   1. Roadmap Enhancements
      1. License Subject Area in Analytics (**H1 2017**)
      2. Advanced Search on License Terms (**H2 2017**)⭐
         1. User roles for viewing licenses ⭐
         2. License printout ⭐ (maybe)
         3. License negotiations
         4. Improved layout of the license header
      3. License renewal (**2018**) ⭐
         1. Action dates on licenses will cause the license to appear in task list.
         2. This will allow staff to view and manage licenses in an efficient manner, as well as gain access from here to related inventory and PO Lines
         3. The library staff will receive an Alert Reminder for expiry of license or for renewal
   2. Non-Roadmap Enhancements
      1. License records interoperable with group settings for Electronic inventory (planned for 2017)
      2. Continue to add DLF/ERMI fields not yet available (ongoing)
      3. Creation of local list of controlled vocabulary to populate terms fields (planned for 2017)
      4. Template license records (planned for 2017)
      5. “Historical” license tracking allowing a portfolio to be linked to current license and any historical license that pertains (planned for 2017) (Hopefully they’ll also fix the “historical linking which is “problematic”)
3. [Ex Libris Responses](https://drive.google.com/open?id=160iyH7btvgPYxmBcEQWZwVYWUUSow9Iiw6YlELgmEts) to [Alma Licensing Task Force Report](https://drive.google.com/file/d/0B6EYI1wkAbOKU19XNnBLWHJmN1U/view?usp=sharing)
   1. Working as needed:
      1. Flexible signed by field
      2. Robust POL linking and dedicated tab
      3. Local license statuses-(well we got the “license review status” - “license status” is still controlled by Ex Libris and cannot be added to or changed)
      4. 2nd signatory film on summary tab
      5. Notes tab color indicator
      6. Licenses added to options in persistent search box
      7. Ability to post a shared license to the network zone to which member libraries can link (no idea if this is working well or not)
      8. “All” filter now really does include all license statuses
      9. Licenses supported in Analytics
   2. Under consideration
      1. License workflowing through entire lifecycle
      2. Linking of authorized user functionality in config to License to allow control of population of authorized user field with correct allowances
   3. Currently not planned:
      1. Ability to add local fields to Summary Tab
      2. Ability to link licenses to physical resources
      3. Ability for Alma to distinguish between different license types
      4. Better functionality in config for the ordering and reordering of terms
      5. Browsable index of license codes
   4. Not working
      1. License start date mandatory when creating new licenses
   5. Partially working
      1. Can add locally defined fields but they don’t currently display properly in Primo
      2. ONIX-PL licenses currently only load a very small (not all that useful) subset of the existing terms
4. Missing Functionality - Round Robin of Ideas
   1. Local fields: Do those local fields need to be coordinated by all the institutions using the network zone? Do they need to agree to the drop down items across the institutions? What happens to local fields?
   2. The ability to truly delete a license or all licenses.
   3. Local fields can be created, but you can not change the license label in Alma. Although you can change other field labels in the Alma Fulfillment Config, the local fields can not be edited.
   4. Functionality to globally (via a job) move inventory to a different license (otherwise you need to do this manually).
   5. What happened to the promise to create a read-only user role?
   6. Linking the portfolio/collection to an incorrect license, and moving it to a different license will move portfolio/collection to the “historical information” section in the incorrect license.
5. How do we want to promote enhancements?
   1. Idea Exchange or NERS
      1. Usually only one person in an institution that does licensing, so can get overshadowed by other NERS enhancements.
      2. Janet will send an email to the Alma listserv and ask for license interest. We will create a document of issues to move to the Idea Exchange (put a limited amount at a time on the IE), and then we can vote.