Licensing Advocacy Group

ELUNA 2018

Agenda

Co-Chairs: Sunshine Carter (University of Minnesota) & Janet Morrow (Northeastern University)

1. Welcome & Introductions
   1. Name Change: SIGs have changed to Advocacy Groups
2. Recent Enhancements
   1. New License Viewer Role (September 2017)
   2. License Administrator Tab (September 2017)
   3. License or amendment print functionality (September 2017)
   4. Remove Historical License References (December 2017)
   5. Functionality for adding a license to a PO Line with no inventory (December 2017)
   6. Add Group Settings to a License (December 2017)
   7. New Controlled Vocabulary (CV) Option in License Term Types (February 2018)
   8. Licensing data now in Analytics (March & May 2018)
3. Wishlist of functionality/enhancements:
   1. Idea Exchange
      1. “batch move license inventory”: ability to relink inventory and/or POL’s to a different license in a batch process
      2. “Simplify license printing”: ability to print a license without formatting a letter - or at least having an easier way to format the letter
      3. “Ability to suppress license from Discovery”
      4. “Add Field for Administrator’s in License Record”
      5. “Colour/shade gradients to tell the difference between license statuses (Active, Retired, Deleted)”
      6. “Colour/shade gradients to tell the different between license statuses (Active, Retired, Deleted)”
      7. “Add option to remove deleted License records in Alma” (Please consider to add another option 'remove' above the 'delete' option for License records.)
      8. “Common link between a POL and a License (for updating collections)”
   2. NERS
      1. The ability to truly delete licenses (4222)
      2. Other filtering options (once filters are fixed!): All except deleted (4984)
      3. Create a warning when inventory & POL are linked to a deleted license (5588)
   3. The ability to link licenses to physical inventory
4. Discussion Topics
   1. What are the licensing workarounds you are still doing outside of Alma?
   2. Are you developing procedural/policy documents? Should we be sharing these? If so, how?

Minutes

LIcense Advocacy Group

ELUNA 2018 - May 4, 2018

Minutes

Sunshine began by discussing Idea Exchange and the NERS process and reviewing the license -related requests that are currently listed in both voting process. She encouraged everyone to use Idea Exchange as an alternative to bring license issues to the attention of Ex Libris. There were a couple of requests for clarification of some of the issues that were listed.

The second discussion item was documentation and whether sites were already creating license documentation and workflows. If so, what would be the best route to share these documents. Was the list effective? Did we need a place to share (similar to the Developer’s Network)? Did we want to set up something ad hoc or see if Ex Libris had any place where these sorts of things can be easily shared? (This has come up recently on the listserv.) (

Next Sunshine passed the microphone around and asked everyone to introduce themselves and

talk about workarounds they were still using in the area of licensing.

Several of the attendees were at sites that haven’t yet migrated to Alma. They were mostly attending to hear the issues and gather some “intel”.

At least one site was still using their CORAL site to manage their licenses. Another had been using Verdi and those licenses will be migrated but they have a backlog of licenses that aren’t in Verdi and they’re looking for strategies for how to manage those.

Several sites talked about backlogs that had to be dealt with either do to vacancies or to migration or because they’ve not had license management software before Alma. One site is planning on hiring a library student to help with some of this clean-up. Another site has their workflow and terminology in place and is working on making sure the ADA compliance information is in place by the time they make their licenses viewable.

One site is in the process of migrating and their license data was being migrated but the licenses did not link correctly to their inventory. Another site (University of Minnesota) migrated their licenses but the ILL data did not migrate correctly so they had to review every license again to add that data back in.

Some successes:

* One site has starting standardizing terms for all licenses for the same vendor/provider which is working well
* Now that licenses are in Analytics, Minnesota was able to discontinue a tracking spreadsheet tha ttheir lending office used, and was able to pull the reports directly from Alma.
* Minnesota also is now able to track the inventory that is not attached to a license via a report, so they can make sure all “paid for” resources are linked to a license.

There was a bit more discussion about how to move forward with sharing documents and information. There was an issue raised about whether the group could/would support workshops or training sessions. We agreed to put a query out to Alma-L to gauge interest. Then perhaps we could see if Ex Libris could support it with access to their WebEx account. The group agreed that we should continue to use Alma-L to communicate so that as many users as possible would hear what’s going on.