

Alma Licensing Best Practices (2025)

The following document focuses on suggestions, tips, and best practices for utilizing the licensing module within Alma. This was created between ELUNA 2024 and 2025 by the user community (via the Alma listserv) and edited by the Alma Licensing Special Interest Group.

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BEST PRACTICES

It's important to remember that the licensing module of Alma is a repository only; it is not as functional as other Alma components.

Time Commitment

Before starting, be aware that this project takes a significant amount of time. It is highly recommended to start with any current agreement, and do not bother with loading older agreements unless time and staffing allow.

Customize Alma Config

Begin by customizing your Alma config to the licensing terms ([Ex Libris documentation](#)), which are important and useful to your institution. More detail is better, but don't waste time filling out information that won't be useful to your organization. Be as accurate as possible when entering terms.

It is more work to start this process without changing the config and then going back to update it. Don't burden yourself down the road.

Determine if negotiation history and pricing would be beneficial in Alma. Add as many notes as possible so someone coming in after you leave will understand the negotiated prices, any quirks about the licenses, and special login information. Attach title lists and amendments. Here's an example from the community: "I added negotiated prices (for consortia) and title lists. Later, I added TOU and notes. Now I add in as much information as I can about the license in the notes and attachments. In the negotiation tab, I add notes for individual libraries if they have an upgrade to a subscription. I keep track of previous FY prices in the notes for each library listed in the negotiation tab."

If migrating to Alma with licenses

If your institution is migrating to Alma and already has an ILS or other program with licensing terms and agreements, work with Ex Libris staff during migration to make sure these are mapped correctly.

Determine if Terms Show in Primo

As part of the configuration process, determine which terms may be useful for library staff and users to see in Alma. Should these terms appear in Primo to ensure transparency of agreements, or should it be up to the user to contact the library?

[Ex Libris Tech Blog: How to make license information appear in Primo View It \(View Online\) after clicking Available Online](#)

Alma User Access

Community users expressed concerns about staff reading the licenses and misinterpreting them. This cannot be resolved through the process of deciding whether to load licenses and/or share terms in Primo. There needs to be ongoing outreach and education on library agreements, terms, and the impact on library staff and users.

It is recommended that a few staff members have edit access to the licenses responsible for loading and understand the terms. On the other hand, staff needing access to the information, particularly e-resource management, collection management/development, acquisitions, and ILL

staff, should have read-only access to terms, title lists, etc. This will reduce accidental changes to terms.

More information on the [Ex Libris Documentation: Roles and Registration Configuration](#).

Standard Licensing Format

Have a standard format for your license code when creating licenses in Alma. Many institutions do this differently, so do what works best for your institution and remain consistent.

Some things to consider are:

- Publisher/provider code (e.g. ProQuest = PQ)
- Date of agreement: determine if this is when the license is, the year the agreement starts, or a run of years for a multi-year agreement
- Location information if Alma has agreements for multiple institutions, libraries, etc.
- Identify if full agreement or if it is an addendum, etc.

Standard Licensing Language

Determine if it is best for your institution to copy/paste terms from an agreement into the fields within Alma. Alternatively, translating the terms into simpler language could facilitate easier understanding among staff and users.

Utilize Templates

Make template licenses for easier updates.

Create templates if you have licenses for the same vendor. For example, an institution or consortia could have 10, 50, or 100 agreements for a single vendor.

[Ex Libris Documentation: Managing License Templates](#)

SERU

There are two options for managing [SERU](#) agreements. You can have one license and link to all the inventory to the one agreement or create a SERU template and create a new license for each vendor using SERU. Do what works best for your institution.

ILL Template

If only using the terms in Primo to indicate ILL terms (or something similar) it may be easiest to create templates for various ILL terms and link those to each resource rather than loading each individual license.

Linking License within Alma

Link the license to the e-collection, e-portfolio(s), and the purchase order line(s). This will make it easier to access information across Alma modules. If linking a license to a collection the included portfolios will inherit the terms.

Utilize Licenses in a Network Zone

If you are managing licenses in the NZ:

[Ex Libris Documentation: Centrally Managed Licenses for Electronic Resources in a Network Zone](#)

Language Concerns

Licensing free text terms are not automatically bilingual in the Network Zone, you have to enter a code to have items show up in another language for your members, as opposed to just changing your Institution Zone setting to French, for example.

Terms in Alma Analytics

If you have someone particularly good at Analytics, have them set up some widgets to allow licensing staff to run reports against all fields in the license and be able to output the contents of the field. You will never be able to anticipate everything you need to update/change/correct, and being able to easily find the records that need work is invaluable.

UNRESOLVED/KNOWN ISSUES

During the creation of this document, the following items were listed as concerns for Ex Libris to address. During talks with Ex Libris staff about the licensing module of Alma (in 2024), they stated that it is not a priority to update this area of Alma. Instead, they recommend utilizing Idea Exchange and Enhancement Voting to improve the platform. However, the SIG acknowledges that it has become increasingly difficult to pass licensing ideas/enhancements due to other community priorities, resulting in the licensing module remaining unchanged. So, these issues are being documented below with the hopes that they will be addressed in the future by Ex Libris:

1. Add additional built-in fields for the following clauses:
 - a. Artificial intelligence (AI)
 - b. Data protection and privacy
 - c. Text and Data Mining (TDM)
 - d. Transformative Agreements
2. The community has security concerns about loading licenses into Alma
3. Expand language inclusivity for the display of licensing terms in Primo, with a lack of languages, patrons are unable to understand terms if it is not in a language they understand
4. Allow the linking of physical items POLs as well as electronic POLs

- a. Examples (not exhaustive):
 - i. DVDs with public performance rights
 - ii. Serials with print and online access
 - iii. Print standing orders with terms
5. Improved API to help load TOU into Alma from a spreadsheet; the current workflow isn't working, resulting in manually having to add terms and most vendors don't provide ONIX-PL for XML loads
6. When moving inventory within Alma the linked license does not move with it
7. May institutions use the same agreements for select vendors. Should there be a shared community zone or repository we could link to for agreements rather than make each institution do this on their own?

ADDITIONAL RESOURCES

Ex Libris Documentation

- [Licenses FAQ](#)
- [Managing Licenses and Amendments](#)
- [Licenses \(4 min. Training video\)](#)
- [Managing License Terms \(in configuration\)](#)

AI Clause Information

- [ICOLC Statement on AI in Licensing](#)
- [Sample Insert Language to Preserve AI in Usage Restrictions Clauses](#) (UC Berkeley Library)
- [Sample Insert Language to Preserve AI in Authorized Uses Clauses](#) (UC Berkeley Library)
- Blog post: [UC Berkeley Library to Copyright Office: Protect fair uses in AI training for research and education](#)
- Presentation: [Fair Use Week 2024: Text Data Mining and AI](#)

Miscellaneous E-Resource Licensing Resources

- [LIBLICENSE-L listserv](#)
- [Open Negotiation Education for Academic Libraries \(ONEAL\)](#)
- [NASIGuide: License Negotiation 101](#)
- [E-Resource Licensing Explained : An A-Z Licensing Guidebook for Libraries](#)
- [Library Accessibility Alliance](#)