CARLI

E-RESOURCES IN ALMA AND CARLI SELECTION SYSTEM

SEPTEMBER 14, 2023

Today's Agenda or Topics

- Introductions and Announcements
- Alma CZ E-Collection IDs
- Licensing Information and Terms
  - Eresources Selection System
  - Alma options
- Automatic Upload of Electronic Holdings

Upcoming CARLI Events

https://www.carli.illinois.edu/calendar

- Weekly Professional Development Alliance (PDA) sessions
- Weekly Support for the Creation of Open Educational Resources (SCOERs) office hours and sessions
- "Let's Talk About Fulfillment" is back and occurs every other week
- Informational sessions on Leganto (Sept. 21) and Alma Digital (Sept. 22)

Why this topic?

- New data and web pages about Alma CZ E-Collection IDs and choosing right CZ E-Collection for your IZ.
- Recent changes to E-Resources Selection System facilitate putting license information into Alma and showing in Primo VE.
- Review of autoholdings options for major eJournal and eBook publishers.

Alma CZ E-Collection IDs

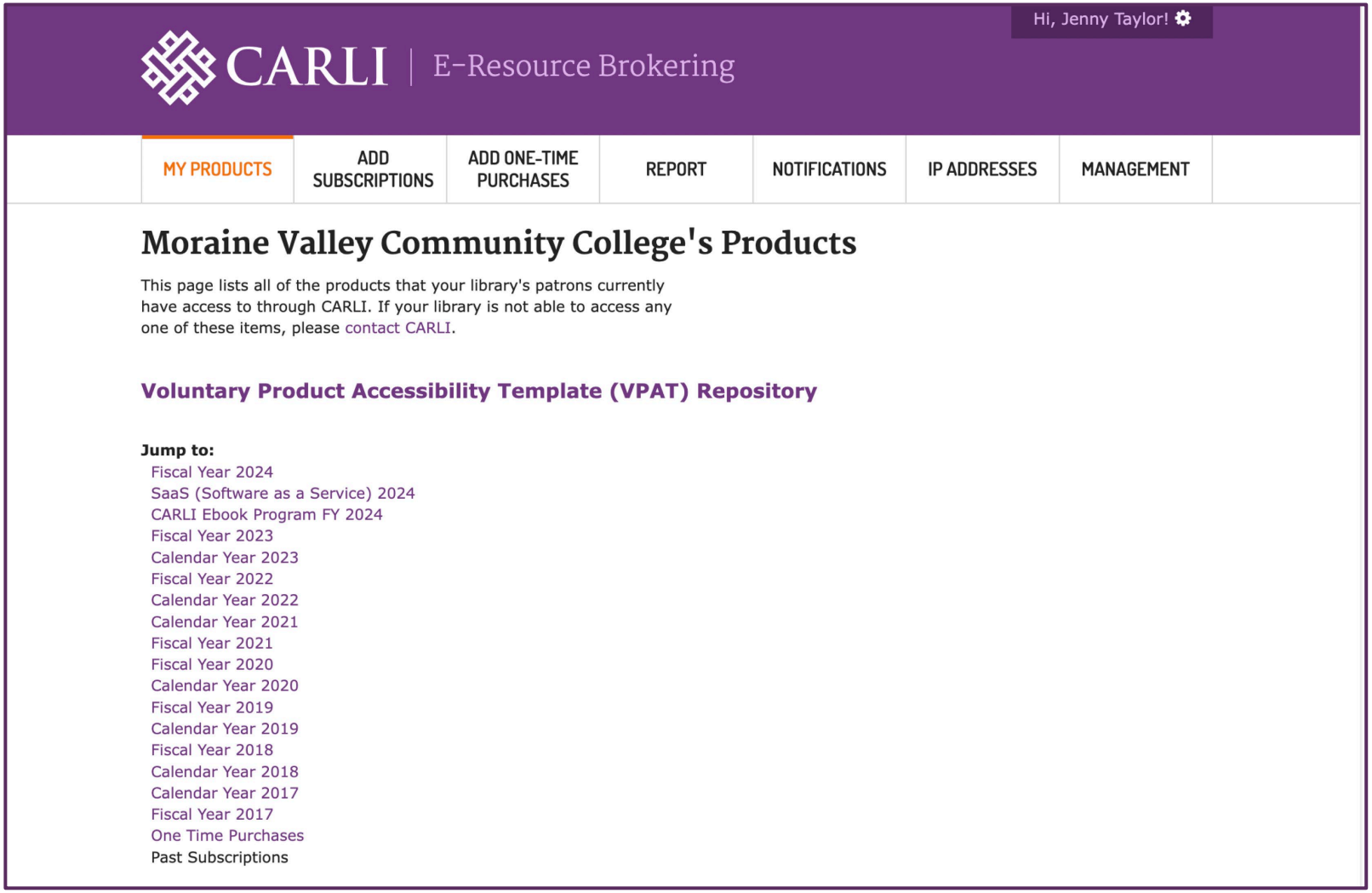
- Are now viewable in the Selection System
  - ID is featured with your selected products for the CY23 and FY24 cycles and all subsequent cycles moving forward.
- A listing of the IDs for selected products is now available on the CARLI website
  - https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/cz-ecollection-ids

Calendar Year 2023

Product	Vendor	License Agreement	Alma CZ E-Collection ID
Sage Premier eJournals – 2016 Collection (via EBSCO or Other Agent)	Sage Publications	Sage Premier eJournals via Agent (2020-2024)	613790000000000586

LICENSING INFORMATION

- E-Resources Selection System Changes to Licensing Information and Terms



LICENSING INFORMATION

(Upgrade Price)		(2015-2025)			
Chronicle of Higher Education	Chronicle of Higher Education	Chronicle of Higher Education (2015-2025)	613790000000001212	Site License	

Product Website

www.Chronicle.com

Product Description

The Chronicle of Higher Education is the most trusted source of news, commentary, trends, and data important to academe. A site license subscription is the best way to provide unlimited access to chronicle.com for all of your staff, students, faculty and administration, whether on campus, working remotely, or on-the-go.

Vendor Pricing Comments

Users	Comment

Comments:

Specific Terms

- Download Digital Copy: Yes
- ILL: Yes
- Course Packs: Yes
- Print Copy: Yes
- Limited Sharing for Scholarly Purposes: No
- E-Reserves: Yes
- Confidentiality of Agreement: Yes
- Confidentiality of User Information: Yes
- Text & Data Mining: No

LICENSING INFORMATION

for all of your staff, students, faculty and administration, whether on campus, working remotely, or on-the-go.

Vendor Pricing Comments

Users	Comment

Vendor Sales Contact

Ray Farmer
Email:
ray.farmer@chronicle.com
Phone: 202-466-1736

~~Limited Sharing for Scholarly Purposes: No~~

E-Reserves: Yes

Confidentiality of Agreement: Yes

Confidentiality of User Information: Yes

Text & Data Mining: No

Accessibility Compliance: No

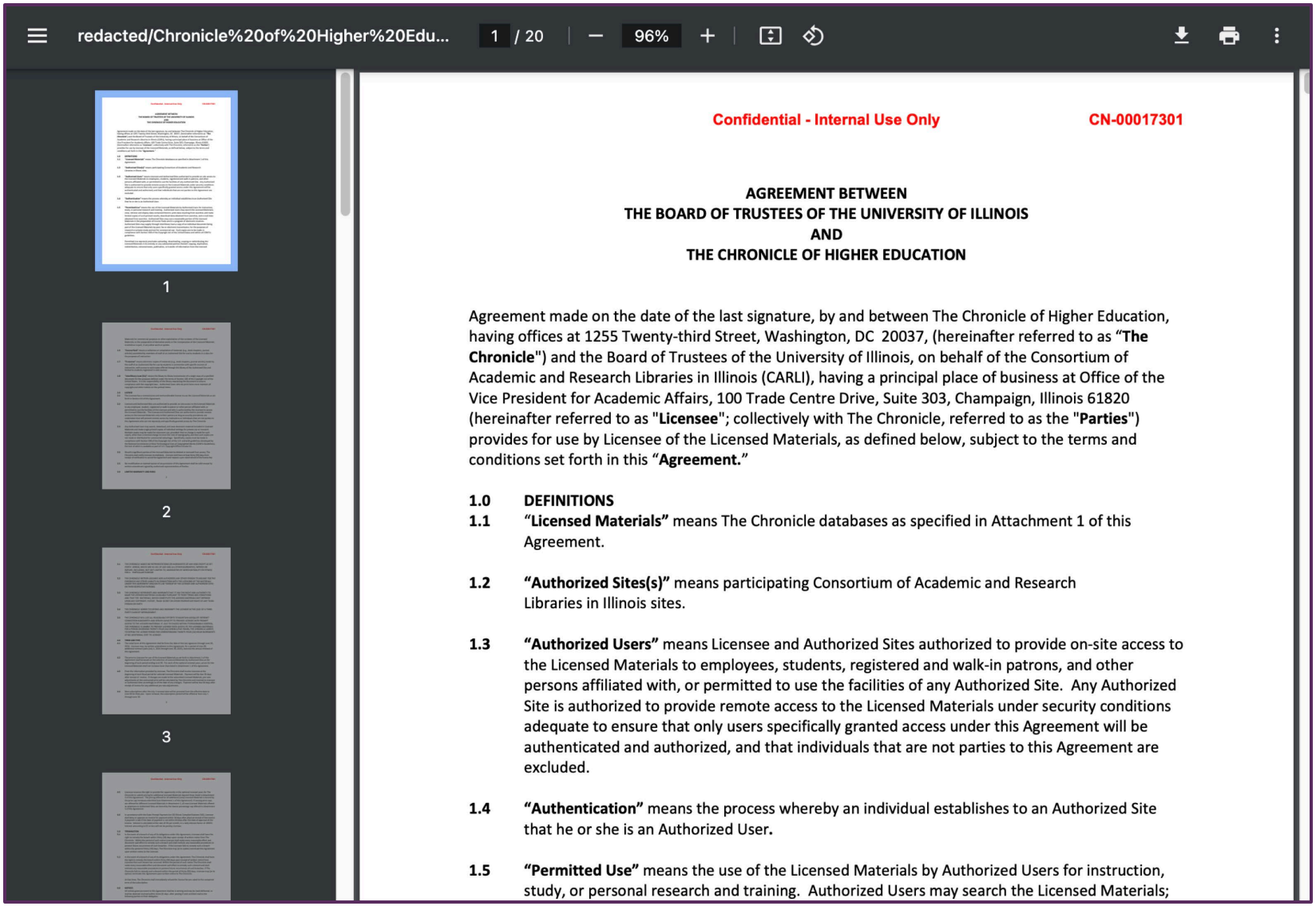
Video Performance Rights: No

Year	Subscribers
2024	92 *Current*
2023	92
2022	93
2021	92
2020	97

Redacted License Agreement(s)

Chronicle%20of%20Higher%20Education%20Contract%20(June%2030%202025).pdf

LICENSING INFORMATION



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AGREEMENT BETWEEN
THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS
AND
THE CHRONICLE OF HIGHER EDUCATION

Agreement made on the date of the last signature, by and between The Chronicle of Higher Education, having offices at 1255 Twenty-third Street, Washington, DC 20037, (hereinafter referred to as "**The Chronicle**") and the Board of Trustees of the University of Illinois, on behalf of the Consortium of Academic and Research Libraries in Illinois (CARLI), having a principal place of business at Office of the Vice President for Academic Affairs, 100 Trade Centre Drive, Suite 303, Champaign, Illinois 61820 (hereinafter referred to as "**Licensee**"; collectively with The Chronicle, referred to as the "**Parties**") provides for use by Licensee of the Licensed Materials, as defined below, subject to the terms and conditions set forth in this "**Agreement.**"

1.0 DEFINITIONS

1.1 "**Licensed Materials**" means The Chronicle databases as specified in Attachment 1 of this Agreement.

1.2 "**Authorized Sites(s)**" means participating Consortium of Academic and Research Libraries in Illinois sites.

1.3 "**Authorized Users**" means Licensee and Authorized Sites authorized to provide on-site access to the Licensed Materials to employees, students, registered and walk-in patrons, and other persons affiliated with, or permitted to use the facilities of any Authorized Site. Any Authorized Site is authorized to provide remote access to the Licensed Materials under security conditions adequate to ensure that only users specifically granted access under this Agreement will be authenticated and authorized, and that individuals that are not parties to this Agreement are excluded.

1.4 "**Authentication**" means the process whereby an individual establishes to an Authorized Site that he or she is an Authorized User.

1.5 "**Permitted Use**" means the use of the Licensed Materials by Authorized Users for instruction, study, or personal research and training. Authorized Users may search the Licensed Materials;

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ATTACHMENT 1
List of Licensed Materials and Not-to-Exceed Annual Percentage Cap Increases
By Renewal Year*
(Confidential Pricing Information Excluded)

*** Renewal Year Periods**
Option Period 1: July 1, 2016 - June 30, 2017
Option Period 2: July 1, 2017 - June 30, 2018
Option Period 3: July 1, 2018 - June 30, 2019
Option Period 4: July 1, 2019 - June 30, 2020
Option Period 5: July 1, 2020 - June 30, 2021
Option Period 6: July 1, 2021 - June 30, 2022
Option Period 7: July 1, 2022 - June 30, 2023
Option Period 8: July 1, 2023 - June 30, 2024
Option Period 9: July 1, 2024 - June 30, 2025

Price cap increases have been negotiated for the initial four (4) Optional Renewal Years. Price cap increases for Optional Renewal Years 5-9 will be negotiated and amended into this Agreement prior to Optional Renewal Year 5.

Databases	Option Period 1	Option Period 2	Option Period 3	Option Period 4
The Chronicle of Higher Education				

Vendor Licenses:

AAAS
ACM
ACS
AMS
Bloomsbury
Chronicle
Duke
EBSCO**
eHRAF
Gale
Infobase/Credo
ITHAKA*
JHU/Muse
Kanopy
Lexis Nexis
MLA
Ovid**
Oxford
ProQuest
Sage
Swank
Wiley*

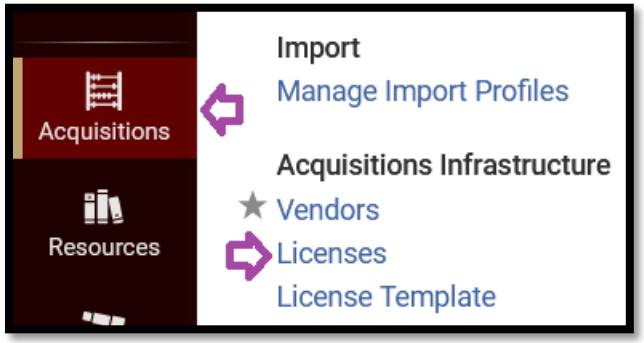
LICENSING INFORMATION

- Alma and Licensing Information and Terms
  - Must have role License Manager
  - If need to create a vendor first, need role Vendor Manager
  - Collect the Licensing Terms you wish to enter.
  - Great way to use Alma as electronic resources manager
  - Can share license terms with coworkers via Alma and (potentially) Primo VE

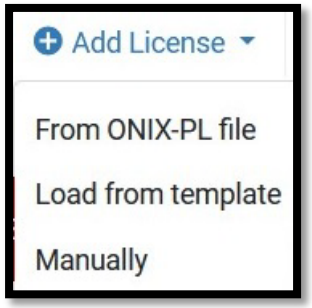
LICENSING INFORMATION

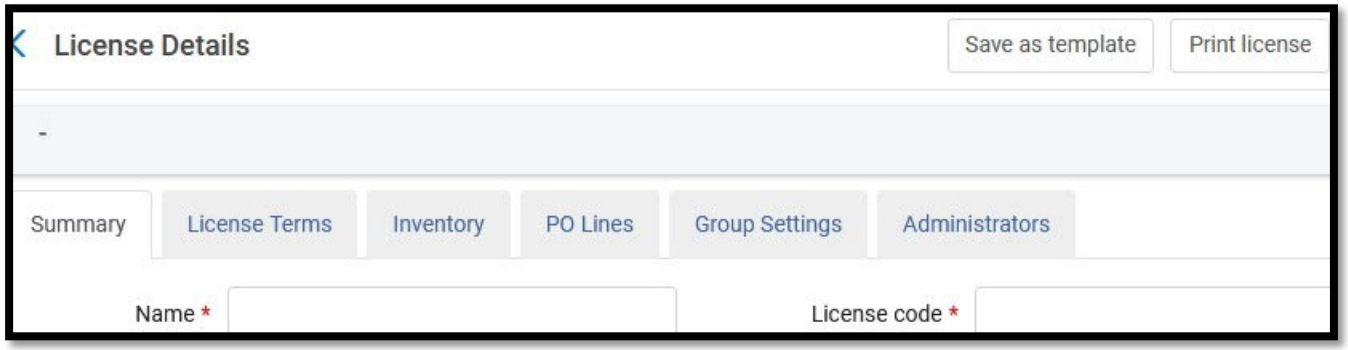
- Major steps after logging into Alma IZ and going to Acquisitions.

1. Look up Vendor to make sure has Licensor trait.
2. Go to Acquisitions- License



3. Add a License
4. Go to either Template, From ONIX file or Manually.





5. If pick “Manually”, fill in relevant fields and save.

LICENSING INFORMATION

Brief Demo

- Major steps after logging into Alma IZ and going to Acquisitions.

1. Look up Vendor to make sure have Licensor trait.
2. Go to Acquisitions- License
3. Add a License
4. Go to either Template, From ONIX file or Manually.
5. Fill in relevant fields and save.

** Training video at http://exl-edu.com/01_Alma/Alma_Essentials/en/Acquisitions/Licenses/ with steps/transcript as well. (see https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/I_Acquisitions_Infrastructure/D_Licenses)

LICENSING INFORMATION

- Primo VE steps
  - To configure the display of license-related information, the following roles are necessary:
    - Acquisitions Administrator
    - Fulfillment Administrator
    - General System Administrator

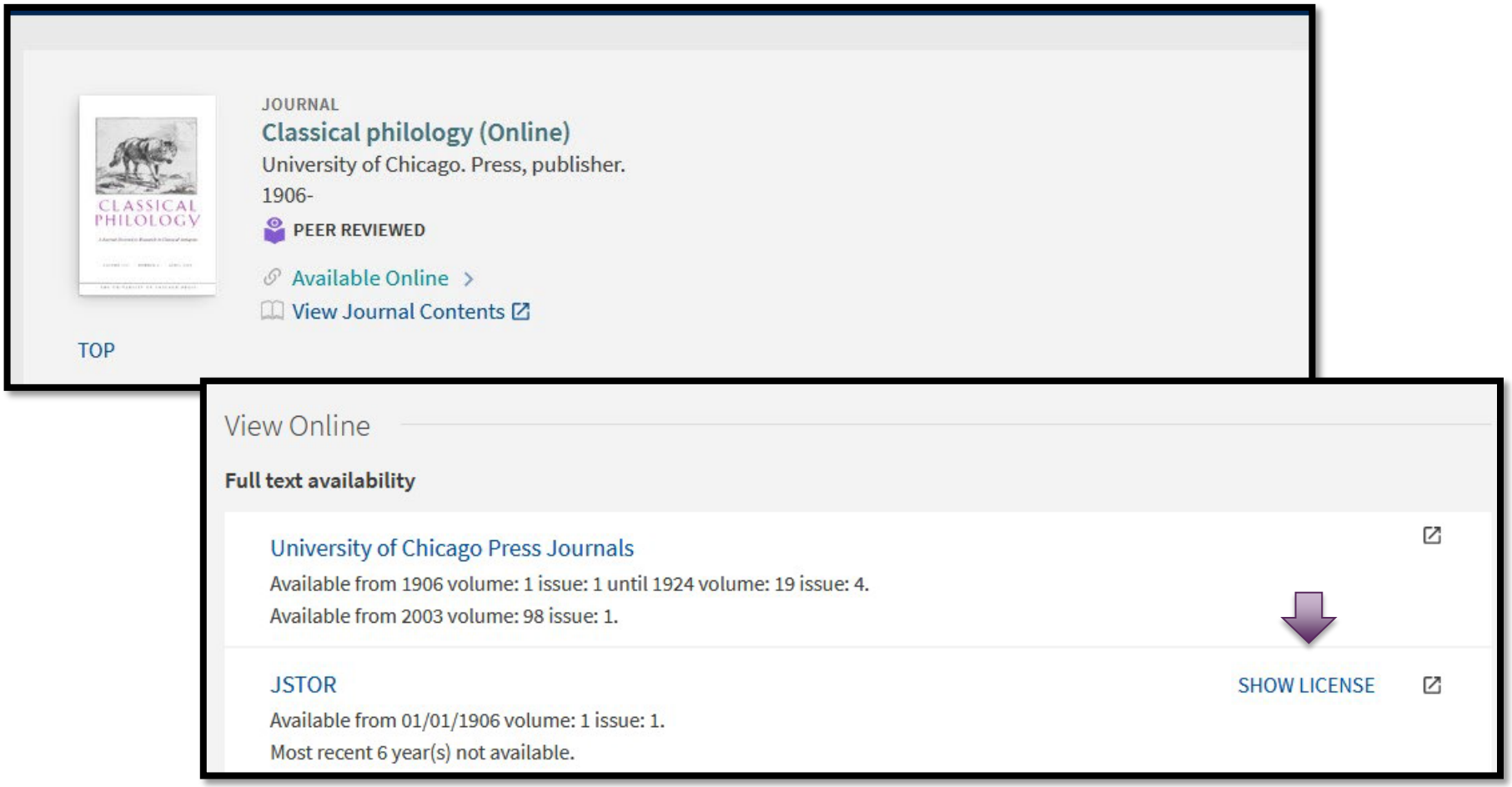
•Open the Other Settings page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Other Settings).

•Select the Enable Display of License Information check box.

•Select Save.

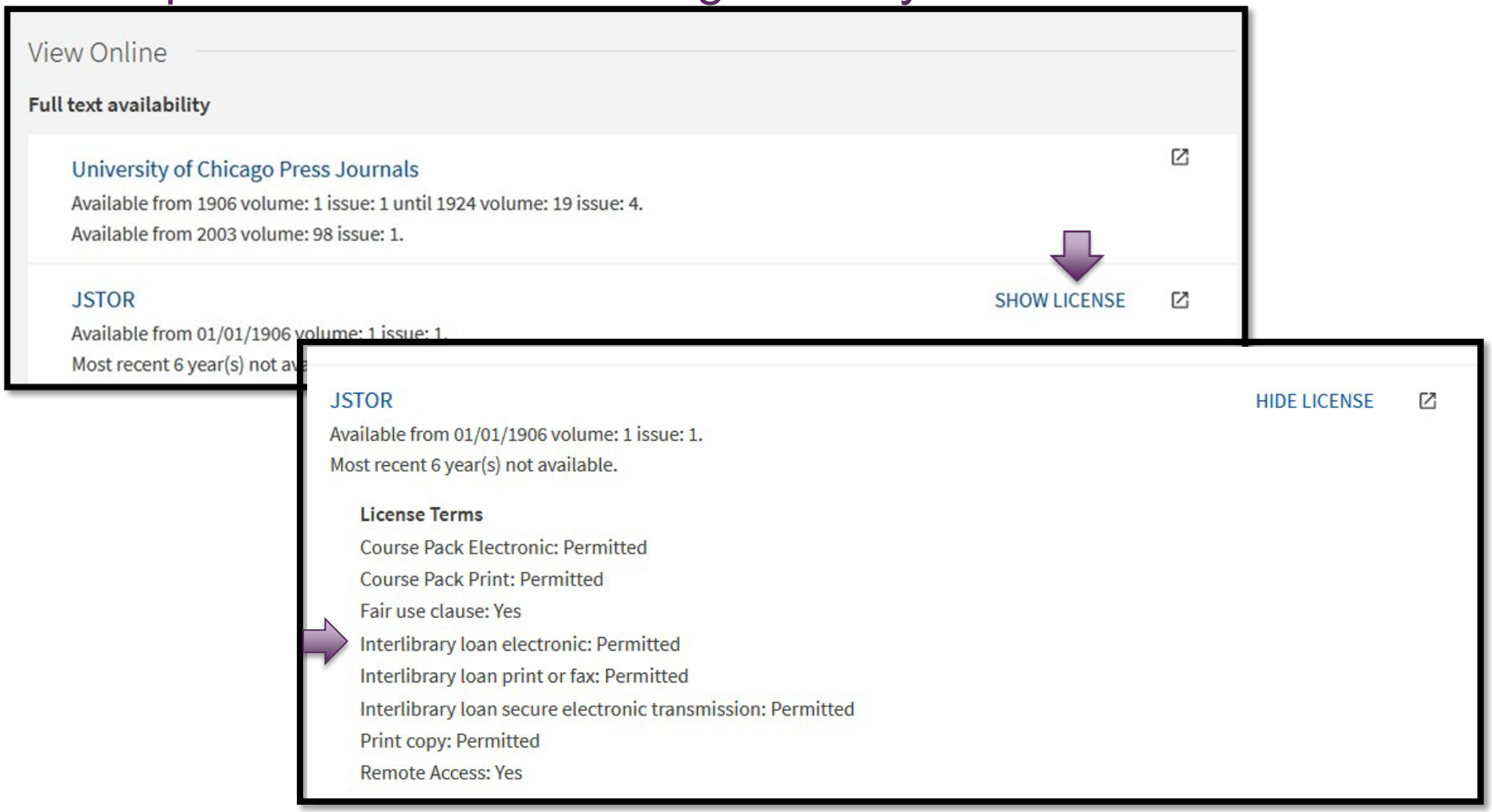
- Note: for instructions on modify the license-related labels, which are defined by the codes that contain a c.uresolver.viewit.license prefix, see instructions on Primo VE label editing: https://www.carli.illinois.edu/products-services/i-share/discovery-interface/custom_labels

Example from Wheaton College Library



https://i-share-whe.primo.exlibrisgroup.com/permalink/01CARLI_WHE/9s5va0/alma99100792725005903

Example from Wheaton College Library



https://i-share-whe.primo.exlibrisgroup.com/permalink/01CARLI_WHE/9s5va0/alma99100792725005903

Links for further learning…

- License Terms in Alma
  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/170Managing_License_Terms

- License Training
  https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/I_Acquisitions_Infrastructure/D_Licenses

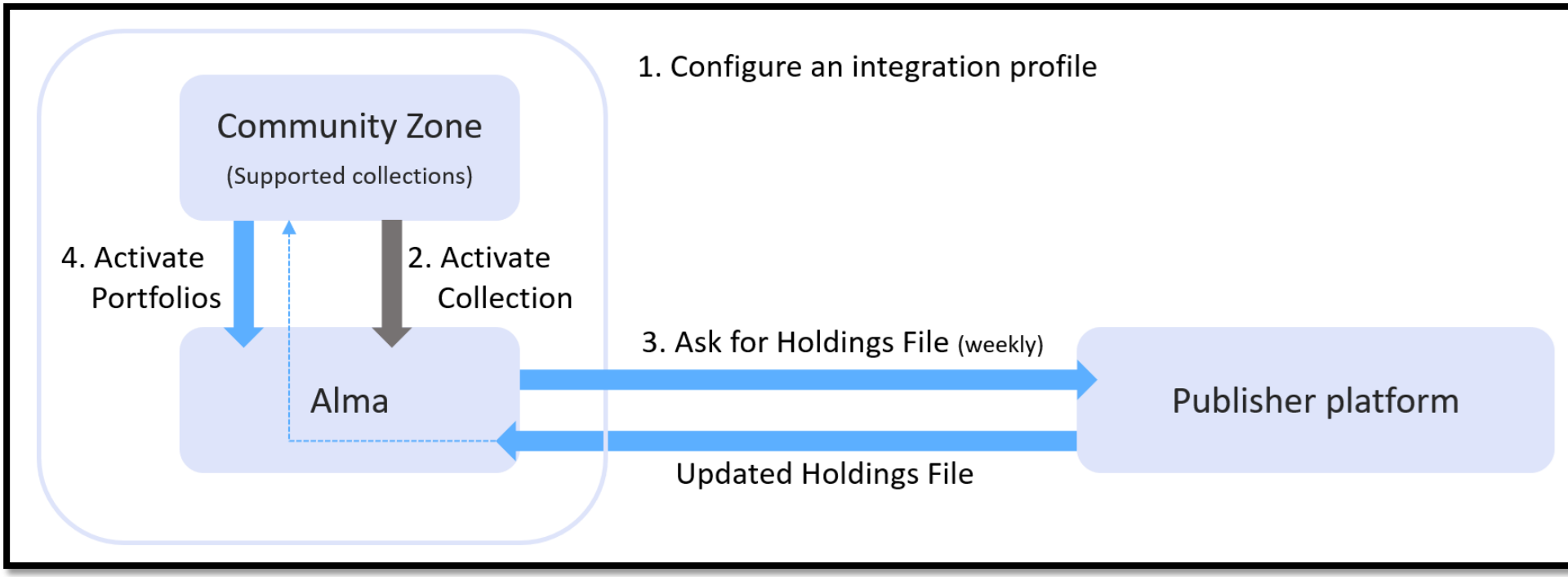
Automatic Upload of Electronic Holdings

- Way to automate the ongoing updates to selected vendors' electronic collections. Set up and KBART files enable scheduled additions, deletions or updated bibliographic records and portfolios activated.
    - Helpful if many changes over time and/or demand driven acq. type e-collections

- Alma has integrations set up for:
    - Elsevier
    - Ovid
    - Project Muse
    - ProQuest Ebook Central
    - Springer
    - Taylor & Francis
    - Wiley
    - Coming in 2024: SAGE

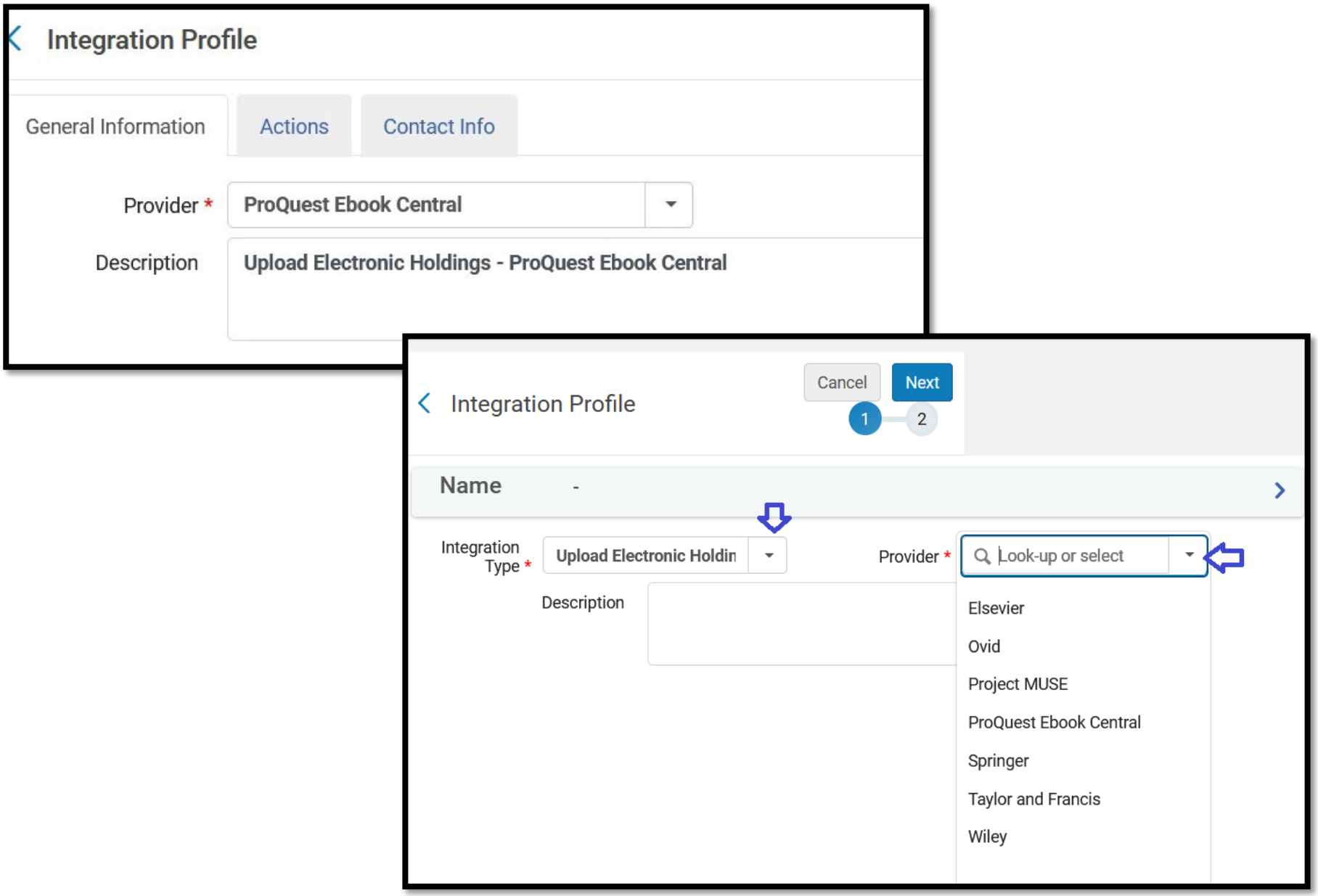
Overview of Process

Step “Zero”. Get token/site id/customer id from vendor.



Taken from:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/020_Working_with_Community_Zone_Electronic_Resources/040Automatic_Upload_of_Electronic_Holdings includes links to each vendor/publisher Alma documentation.

AUTOHOLDINGS: EXAMPLES FROM SIC LIBRARY



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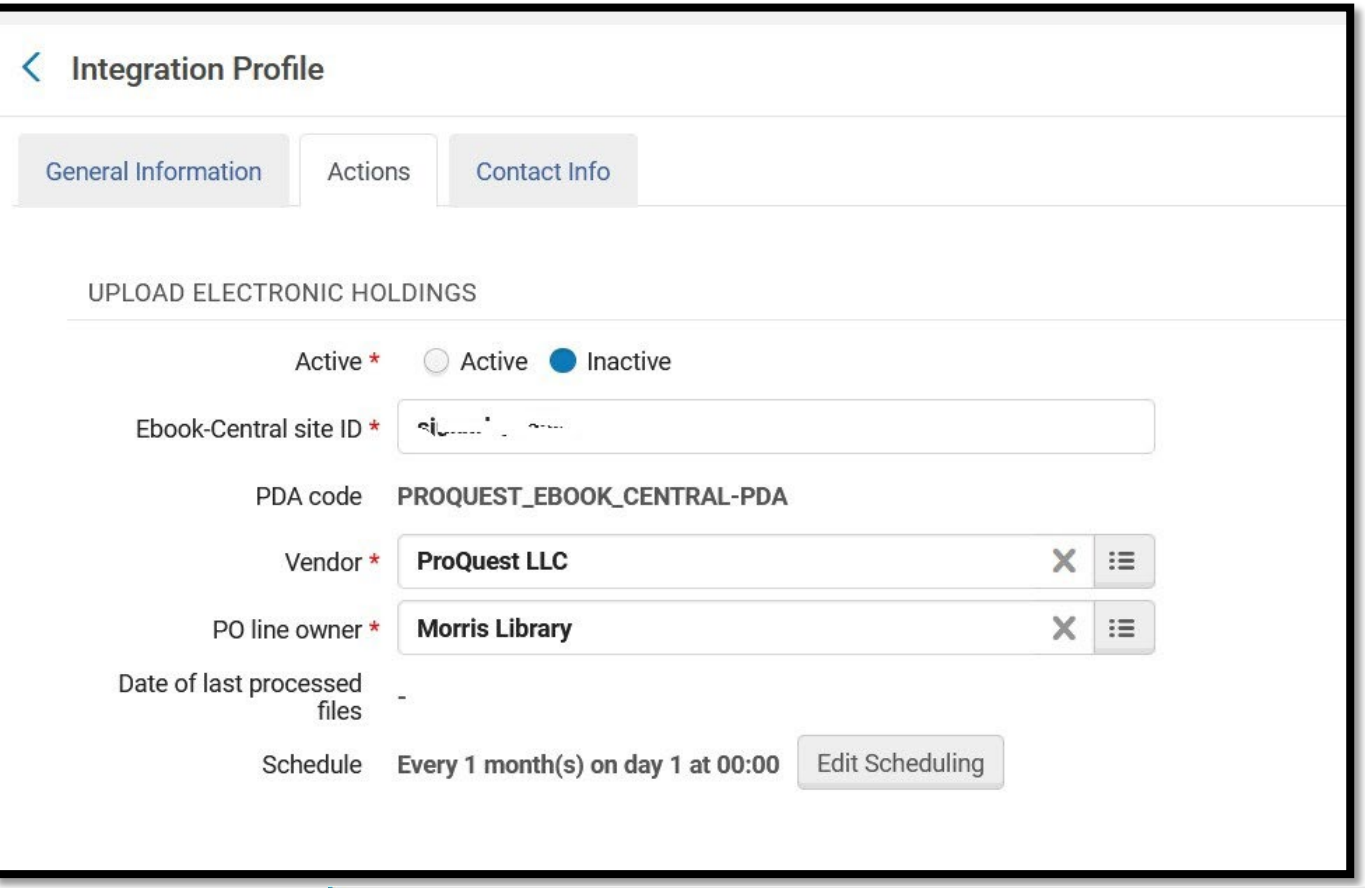

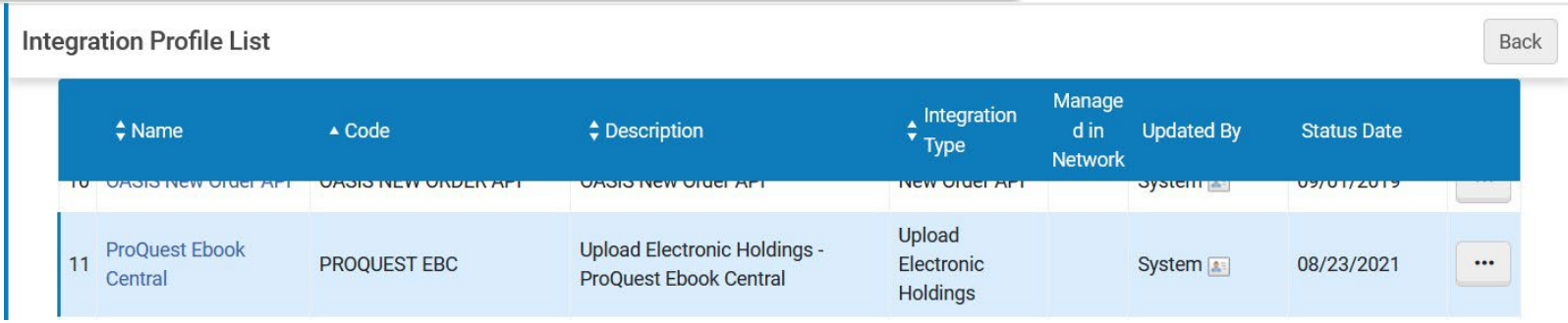

QUESTIONS?

Contact CARLI at
support@carli.illinois.edu

The next Alma Primo VE Office Hours are Thursday, October 12, 2023.

Multicolored wildflowers.