



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



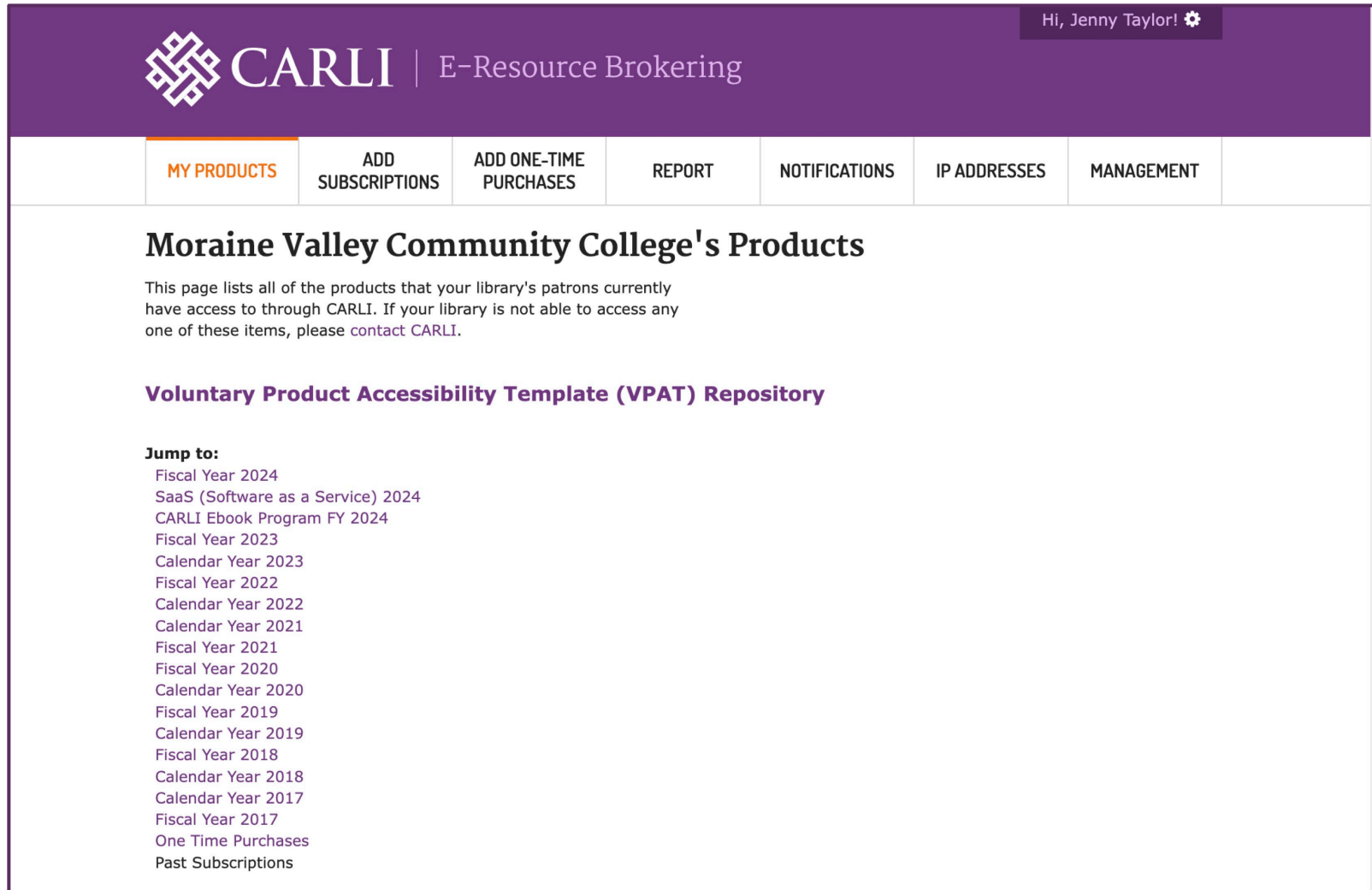
- Are now viewable in the Selection System
 - ID is featured with your selected products for the CY23 and FY24 cycles and all subsequent cycles moving forward.
- A listing of the IDs for selected products is now available on the CARLI website
 - <https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/cz-ecollection-ids>



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 |

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



The screenshot displays the CARLI E-Resource Brokering interface. At the top, the CARLI logo and 'E-Resource Brokering' text are visible. A user greeting 'Hi, Jenny Taylor!' with a settings icon is in the top right. A navigation bar contains several menu items: 'MY PRODUCTS' (highlighted), 'ADD SUBSCRIPTIONS', 'ADD ONE-TIME PURCHASES', 'REPORT', 'NOTIFICATIONS', 'IP ADDRESSES', and 'MANAGEMENT'. The main content area is titled 'Moraine Valley Community College's Products' and includes a descriptive paragraph. Below this is a section for 'Voluntary Product Accessibility Template (VPAT) Repository' with a 'Jump to:' list of various product categories and years.

Hi, Jenny Taylor! ⚙️

CARLI | E-Resource Brokering

MY PRODUCTS ADD SUBSCRIPTIONS ADD ONE-TIME PURCHASES REPORT NOTIFICATIONS IP ADDRESSES MANAGEMENT

Moraine Valley Community College's Products

This page lists all of the products that your library's patrons currently have access to through CARLI. If your library is not able to access any one of these items, please [contact CARLI](#).

Voluntary Product Accessibility Template (VPAT) Repository

Jump to:

- Fiscal Year 2024
- SaaS (Software as a Service) 2024
- CARLI Ebook Program FY 2024
- Fiscal Year 2023
- Calendar Year 2023
- Fiscal Year 2022
- Calendar Year 2022
- Calendar Year 2021
- Fiscal Year 2021
- Fiscal Year 2020
- Calendar Year 2020
- Fiscal Year 2019
- Calendar Year 2019
- Fiscal Year 2018
- Calendar Year 2018
- Calendar Year 2017
- Fiscal Year 2017
- One Time Purchases
- Past Subscriptions

| (Upgrade Price) | | (2015-2025) | | | | | | | | | | | | | |
|--|-------------------------------|---|-------------------|--------------|--|----------------|-----------------------------------|-----------------|--------------------------|------------------------|---|------------------------|--|---|-------------------------------|
| ▼ Chronicle of Higher Education | Chronicle of Higher Education | Chronicle of Higher Education (2015-2025) | 61379000000001212 | Site License | | | | | | | | | | | |
| <p>Product Website www.Chronicle.com</p> <p>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.</p> <p>Vendor Pricing Comments</p> <table border="1"> <thead> <tr> <th>Users</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table> | | | | | | Users | Comment | | | | | | | | |
| Users | Comment | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| <p>Comments:</p> <table border="1"> <thead> <tr> <th>Specific Terms</th> </tr> </thead> <tbody> <tr> <td>Download Digital Copy: Yes</td> </tr> <tr> <td>ILL: Yes</td> </tr> <tr> <td>Course Packs: Yes</td> </tr> <tr> <td>Print Copy: Yes</td> </tr> <tr> <td>Limited Sharing for Scholarly Purposes: No</td> </tr> <tr> <td>E-Reserves: Yes</td> </tr> <tr> <td>Confidentiality of Agreement: Yes</td> </tr> <tr> <td>Confidentiality of User Information: Yes</td> </tr> <tr> <td>Text & Data Mining: No</td> </tr> </tbody> </table> | | | | | | 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 |
| 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 | | | | | | | | | | | | | | | |

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 Secondary 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 <i>Current</i> |
| 2023 | 92 |
| 2022 | 93 |
| 2021 | 92 |
| 2020 | 97 |

Redacted License Agreement(s)

[Chronicle%20of%20Higher%20Education%20Contract%20\(June%2030%202025\).pdf](#)

redacted/Chronicle%20of%20Higher%20Edu... 1 / 20 96%

Confidential - Internal Use Only **CN-00017301**

**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;

Confidential - Internal Use Only

CN-00017301

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*

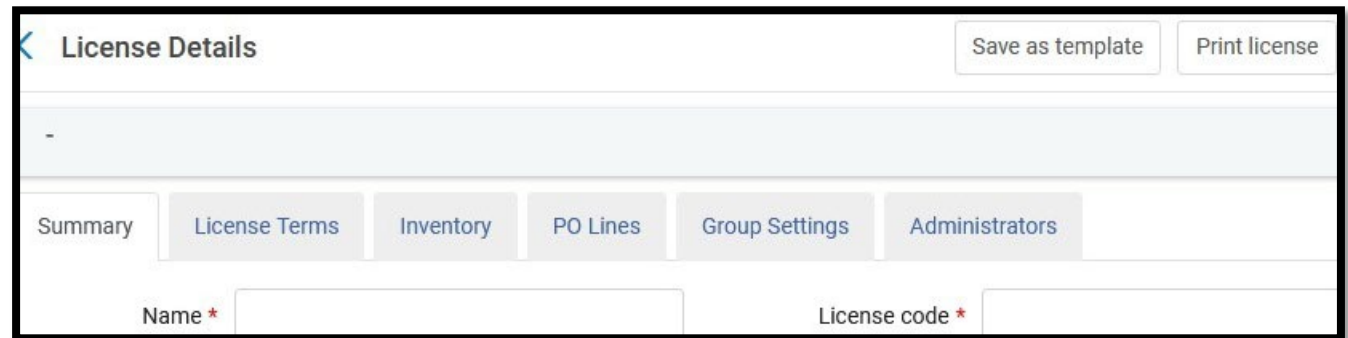
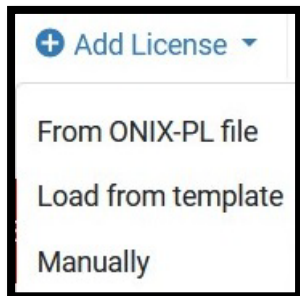
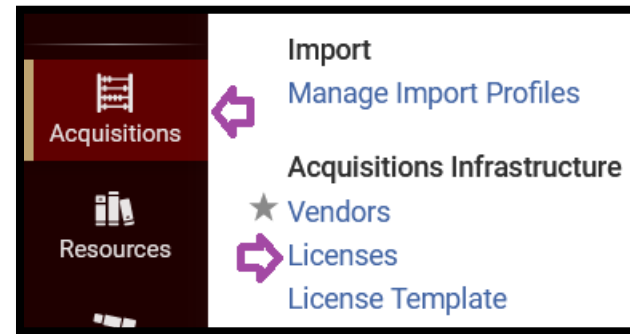


- **Alma and Licensing Information and Terms**
 - Must have role License Manager
 - If need to create a vendor first, need role Vendor Manager
 - Collect the Licensing Terms you wish to enter.
 - Great way to use Alma as electronic resources manager
 - Can share license terms with coworkers via Alma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

Brief Demo

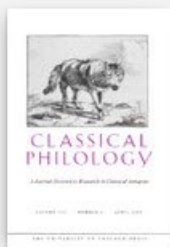
- Major steps after logging into Alma IZ and going to Acquisitions.
 1. Look up Vendor to make sure have Licensor trait.
 2. Go to Acquisitions- License
 3. Add a License
 4. Go to either Template, From ONIX file or Manually.
 5. Fill in relevant fields and save.

** 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)

- **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



JOURNAL

Classical philology (Online)

University of Chicago. Press, publisher.

1906-

 PEER REVIEWED

 [Available Online >](#)

 [View Journal Contents](#) 

[TOP](#)

View Online

Full text availability

[University of Chicago Press Journals](#)

Available from 1906 volume: 1 issue: 1 until 1924 volume: 19 issue: 4.

Available from 2003 volume: 98 issue: 1.



[JSTOR](#)

Available from 01/01/1906 volume: 1 issue: 1.

Most recent 6 year(s) not available.

[SHOW LICENSE](#)



Example from Wheaton College Library

View Online

Full text availability

University of Chicago Press Journals 

Available from 1906 volume: 1 issue: 1 until 1924 volume: 19 issue: 4.

Available from 2003 volume: 98 issue: 1.

JSTOR

Available from 01/01/1906 volume: 1 issue: 1.

Most recent 6 year(s) not available.

SHOW LICENSE 



JSTOR

HIDE LICENSE 

Available from 01/01/1906 volume: 1 issue: 1.

Most recent 6 year(s) not available.

License Terms

Course Pack Electronic: Permitted

Course Pack Print: Permitted

Fair use clause: Yes

Interlibrary loan electronic: Permitted

Interlibrary loan print or fax: Permitted

Interlibrary loan secure electronic transmission: Permitted

Print copy: Permitted

Remote Access: Yes



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](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

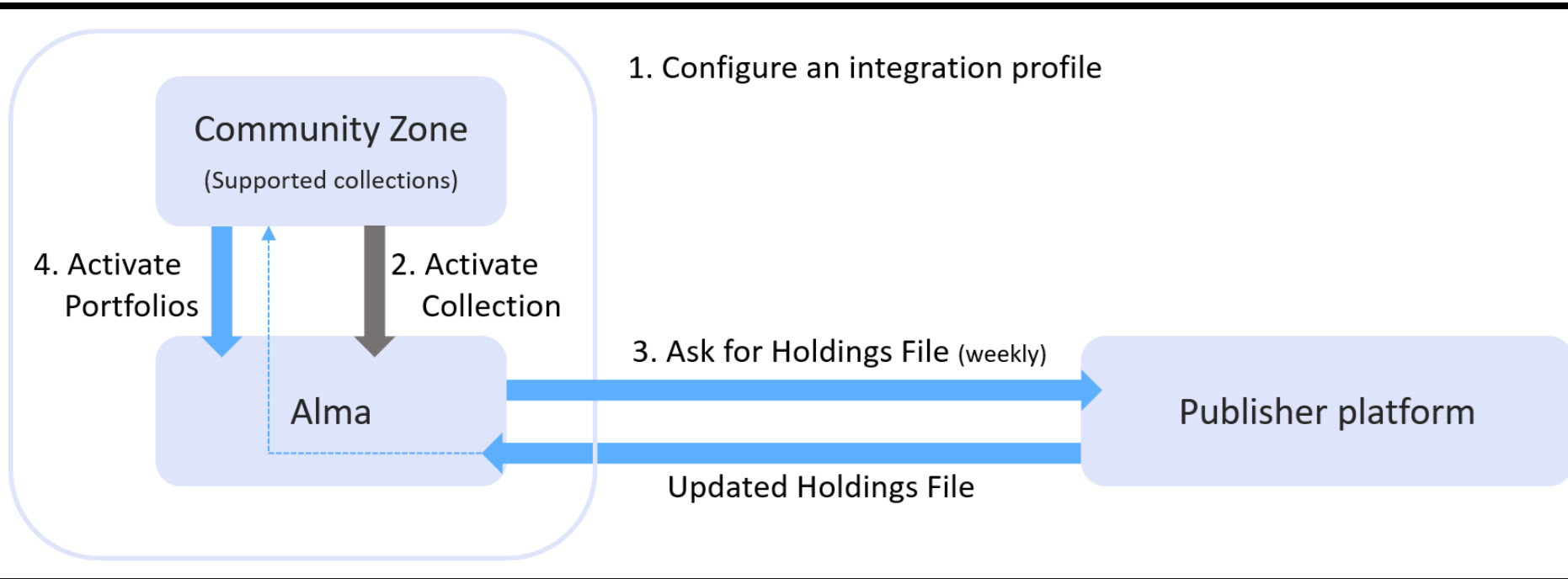
- Way to automate the ongoing updates to selected vendors' electronic collections. Set up and KBART files enable scheduled additions, deletions or updated bibliographic records and portfolios activated.
 - Helpful if many changes over time and/or demand driven acq. type e-collections
- Alma has integrations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

< Integration Profile

General Information **Actions** Contact Info

Provider * **ProQuest Ebook Central** ▾

Description **Upload Electronic Holdings - ProQuest Ebook Central**

< Integration Profile

Cancel **Next**

1 — 2

Name - >

Integration Type * **Upload Electronic Holdin** ▾

Provider * **Look-up or select** ▾

Description

- Elsevier
- Ovid
- Project MUSE
- ProQuest Ebook Central
- Springer
- Taylor and Francis
- Wiley



AUTOHOLDINGS: EXAMPLES FROM SIC LIBRARY

[←](#) Integration Profile

General Information Actions Contact Info

UPLOAD ELECTRONIC HOLDINGS

Active * Active Inactive

Ebook-Central site ID *

PDA code **PROQUEST_EBOOK_CENTRAL-PDA**

Vendor * **ProQuest LLC** X ≡

PO line owner * **Morris Library** X ≡

Date of last processed files -

Schedule **Every 1 month(s) on day 1 at 00:00** [Edit Scheduling](#)

Integration Profile List [Back](#)

| | Name | Code | Description | Integration Type | Managed in Network | Updated By | Status Date | |
|----|------------------------|---------------------|---|----------------------------|--------------------|------------|-------------|-----|
| 10 | OASIS New Order API | OASIS NEW ORDER API | OASIS New Order API | New Order API | | System | 09/01/2019 | |
| 11 | ProQuest Ebook Central | PROQUEST EBC | Upload Electronic Holdings - ProQuest Ebook Central | Upload Electronic Holdings | | System | 08/23/2021 | ... |

QUESTIONS?

Contact CARLI at
support@carli.illinois.edu

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



Multicolored wildflowers.