LICENSE TERMS IN ALMA AND GIL-FIND

Jessica Lee | Valdosta State University
Introduction

- Electronic Resources & Serials Librarian at Valdosta State University since November 2013

- Negotiation and contracts are handled by our Acquisition Librarian and Collection Development Librarian

- At VSU we have a limited amount of negotiation wiggle room, our university contracts department handles most of the process
Why are licenses important?

• It is a binding contract between your library and a publisher or vendor

• It stipulates how you can use their content

• The license terms can restrict or allow different uses of the content
Why should you add license terms to GIL-Find

- Often faculty make assumptions about how a resource can be used
- Faculty may heavily rely on adding PDFs to their D2L courses
- This could be a learning tool for faculty
Why should you add license terms to GIL-Find

• Circulation and Interlibrary Loan staff may need license terms to perform jobs duties

• Often licenses detail if and how a resource can be used for course reserves and interlibrary loan

• It is easier to look up a specific journal or e-book that you may need to add to course reserves or ILL in GIL-Find than hunting down the actual license
Adding Licenses Terms to Alma

• There are different permission sets if you want to view or add and edit licenses in Alma

• To view licenses and license amendments, you must have one of the following roles:
  • License Manager
  • License Viewer
  • Selector
  • Purchasing Operator
  • Purchasing Manager
Adding Licenses Terms to Alma

• To manage licenses and license amendments, you must have the following role:

  • License Manager
Adding License Terms to Alma

• You can add as much or as little information as you want for the licenses. There are some required fields.

• If your institution doesn’t have a centralized place for licenses, Alma would be a great place to start.

• At VSU, our licenses live in our Network Drive in a folder only certain people can access.

• I use the License feature in Alma to store important licensing information so I do not have to constantly refer back to a license.

• The main driving force behind adding our licenses was to display the license terms for staff and our patrons.

• To encourage faculty to use persistent links instead of PDFs.
Setting up a license

• There are 3 ways to add a license. I will focus on adding licenses manually.
• You can get to the licenses by changing the drop-down menu to Licenses and clicking Search. Or in the Acquisitions tab.
Setting up a License

- The Name and License Code can be the same or use an abbreviation.
Filling in License Terms

• The next section in the License is the License Terms. You can either rely on the drop down menu or use the note fields. You can fill in as much or as little as needed.
Order of License Terms

- The older of the license terms are configured in the Alma Configuration. This is where you choose if a license terms displays in GIL-Find or not.
Order of License Terms

The previous screen (the order of license terms) will change where the fields are because you are dictating in what order they will appear in the Alma configuration.

My example may not look like your screen.
Inventory

- Unfortunately, you cannot add inventory at the license level. The license must be added at the collection or portfolio level.
PO Lines

- You can associate PO Lines with the license. VSU does not. The PO is added at the portfolio or collection level instead.
Amendments

• If there are changes to a license or amendments, you can add them here.
Attachments

- You can upload the license under Attachments
Enabling Display

• While in the Alma configuration, under Fulfillment – Discovery Interface Display Logic – Other Settings, check “Enable Display of License Information” and click Save.
Adding Licenses to Inventory

• Search for the Electronic Collection or Portfolio. Click Edit Collection.
Adding Licenses to Inventory
Adding Licenses to Inventory
License Terms in GIL-Find

Full text available at: ACM Digital Library Complete

License Terms
Course Reserve Note: Libraries may include copies of DL digital content in local electronic course reserve systems limited to use of Authorized Users of current classes.
Course Reserve Electronic Copy: Permitted
Interlibrary loan electronic: Permitted
Interlibrary loan note: Facsimile images that are exact representations of the print pages or of printouts from the electronic database may be provided for interlibrary loan under CONTU guidelines and distributed in paper, fax, or digital form.
Simplify the Language

• Licenses are filled with legalese. Instead of copying and pasting from the license try simplifying the language.
What records look like today

View Online

Full text available at: EBSOHost Business Source Complete - GALILEO
Available from 1965.
Most recent 1 year(s) not available.

Full text available at: JSTOR Arts and Sciences IV
Available from 1940 volume: 1 issue: 1.
Most recent 6 year(s) not available.

License Terms
-Digitally copy: Prohibited
-Course Pack Note: Not Permitted. Linking may be used instead of PDFs.
-Course Reserve Note: Not Permitted.
-Interlibrary loan note: Allowed with Restrictions.
-Staff ILL Note: Only one chapter per book may be sent via ILL lending.
-Authorized User Definition: Current faculty, staff, students, walk in users, and individuals associated with the university.

Full text available at: ProQuest Central - GALILEO
Available from 01/01/1988 until 01/31/2011.

License Terms
-Digital copy note: Allowed
-Course Pack Note: Allowed
-Course Reserve Note: Allowed
-Interlibrary loan note: Allowed with Restrictions
-Staff ILL Note: With respect to ebooks, copying is limited to small portions of a book.
-Authorized User Definition: Currently enrolled students, faculty, staff, and visiting scholars, as well as walk-in patrons while they are on-site.
GALILEO License Terms in GIL-Find

• In October 2019, myself as chair of the Acquisitions/ERM committee met with 3 other librarians as well as the Acquisitions librarian for GALILEO to talk about adding licenses to our OPAC.

• We used the University of Washington as an example and the language they use.

• Presented our case to RACL (Regents Academic Committee on Libraries) and was approved to add license terms to consortium purchased databases and collections.
Example of University of Washington

<table>
<thead>
<tr>
<th>License Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Fair use: No</td>
</tr>
<tr>
<td>- Course Pack Print: Permitted</td>
</tr>
<tr>
<td>- Course Pack Electronic: Permitted</td>
</tr>
<tr>
<td>- Course Reserve Print: Permitted</td>
</tr>
<tr>
<td>- Course Reserve Electronic Copy: Prohibited</td>
</tr>
<tr>
<td>- Copies for course reserves prohibited: use links</td>
</tr>
<tr>
<td>- Scholarly sharing: Permitted</td>
</tr>
<tr>
<td>- Digitally copy: Permitted</td>
</tr>
<tr>
<td>- Print copy: Permitted</td>
</tr>
<tr>
<td>- Interlibrary loan electronic: Permitted</td>
</tr>
<tr>
<td>- Interlibrary loan print or fax: Permitted</td>
</tr>
<tr>
<td>- Interlibrary loan secure electronic transmission: Permitted</td>
</tr>
<tr>
<td>- ILL limited to non-commercial libraries; pilot allows delivery outside U.S. (see terms for details)</td>
</tr>
<tr>
<td>- Remote Access: Yes</td>
</tr>
<tr>
<td>- Distance education: Permitted</td>
</tr>
<tr>
<td>- Electronic Link: Permitted</td>
</tr>
<tr>
<td>- Other Terms of Use Note: Text &amp; Data Mining: see Instructions &amp; restrictions on <a href="https://guides.lib.washington.edu/research/dstools.htm">https://guides.lib.washington.edu/research/dstools.htm</a></td>
</tr>
<tr>
<td>- Concurrent Users Note: Unlimited users</td>
</tr>
<tr>
<td>- Authorized users: Faculty, Staff, Students, Walk-in users</td>
</tr>
</tbody>
</table>
On behalf of the Acquisitions/ERM chair, the ILL subcommittee chair, the OPAC committee chair, and the previous ILL subcommittee chair, we would like to propose that the license terms from GALILEO licensed materials be put into Alma for all USG. Each collection visible in GIL-Find that is licensed by GALILEO would also display the license terms. An institution can opt out of the license terms being displayed in GIL-Find. The committee believes that by adding the license terms in GIL-Find, this would increase the number of ILL requests that each institution can fulfill and provide ease in their workflows.

The committee believes the following license terms would be the most suitable for GIL-Find and all institutions:

University of Washington examples:
1. Academic Search complete
2. JSTOR
3. ProQuest Ebook Central
4. ScienceDirect

1. Course packs / electronic link term note
   2. Not allowed/Allowed. List limitations if applicable, ex. Use links in D2L.
2. Concurrent users (if relevant)
   1. # of concurrent users
3. Digital copy
   1. Not allowed/Allowed. List limitations if applicable, ex. Download and keep digital copy.
4. Scholarly sharing
   1. Not allowed/Allowed.
5. Data mining (if relevant)
   1. Not allowed/Allowed. List limitations if applicable.
6. Course reserves
   1. Not allowed/Allowed. List limitations if applicable.
7. Authorized users
   1. Ex: Faculty, staff, students, walk-in users
8. ILL
   1. Not allowed/Allowed. List limitations if applicable.
GALILEO License Terms in GIL-Find

• Currently we have EBSCO, ProQuest, and Films on Demand license information in GIL-Find for GALILEO resources.

• There should be licenses added for Ovid and ACS (American Chemical Society) this fiscal year (FY21) but date is TBD.

• All GALILEO resources license terms use the outline in the previous slide.
Other helpful license information

• If your e-book or resource has a limited number of concurrent users, that information would be helpful to add as well. However, that could be time consuming to add since most titles in e-book collection have varying concurrent users.
Do faculty even look at this?

• We had a faculty member reach out in May regarding “course packs” in the license and what it means
  • He asked if he could inform his students could use it
  • He also asked if there was a limit to how many students could access it

• Vendors typically create 1U1B (1 user, 1 book) licenses for titles that are encyclopedias and textbook like titles
Empower Faculty

Step-by-Step Guide to Copyright Compliance

for Electronic Course Materials

Faculty are responsible for ensuring that their course materials comply with copyright law.

Restrict access

If copyrighted materials are placed on the web, access must be restricted to authorized users. Learning Management Systems such as Canvas, Blackboard, Moodle, or Catalyst have functions that limit access to students enrolled in a class or specifically designated by the instructor.

Post a copyright notice

The example wording below contains the basic requirements:

The copyright law of the United States (Title 17, United States Code) governs the use of copyrighted materials including copying and distribution. Fair use (Section 107) allows for limited use of copyrighted materials without the permission of the copyright owner. Individuals using copyrighted materials in excess of fair use may be liable for copyright infringement.

Evaluate each work for copyright compliance every quarter

The University of Washington uses a five-pronged approach to complying with copyright law for electronic materials:

1. Licensed materials
2. Openly Accessible Materials
3. Fair use
4. Obtaining permission
5. Alternatives

The UW Libraries license a variety of electronic materials for course use. To find out if your readings are licensed:

- Search the UW Libraries Catalog
- If it is available electronically, you may link to individual articles. See instructions for creating stable links to resources.

https://www.lib.washington.edu/types/course/instructors/compliance/copyrightsteps
DEMO
Documentation for more information

• G3 Training Wiki
  https://sites.google.com/view/g3almatraining/acquisitions/licenses?authuser=0

• Ex Libris Knowledge Center
  https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/E-
  Resource_Management/Licenses

  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/050Managing_Licenses_and_Amendments
Thank you!

My e-mail address is jessicalee@valdsota.edu