

NYU Libraries Alma Training Documentation: Configuring Licenses

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Related Materials and Resources

- [Alma Documentation](#)
- [Alma Migration Guide: Training](#)

Who is this document for and what does it cover?

- **Intended Audience:** Technical Services Managers
- This document describes configurations available for license management in Alma, including managing license terms, ordering license sections, managing license review statuses, and how to publicly display license terms in Primo.

To get help, or provide feedback on this document

If you have questions or suggested edits please contact Ayse Kocoglu
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How to Configure Licenses in Alma

1. **How to Configure the License Sections Order**
 - a. **Navigate to Configurations and select 'Sections Order' under Acquisitions/Licenses.** It will open the Mapping table for License Sections Order. Before proceeding further make sure that you are configuring at the institution level.

- b. **Enable the sections that will be used in the licenses added to Alma.** Sections can be enabled and disabled but the section names are not configurable.
- c. **Delete the section that you want to change the order for by selecting 'Delete' from the ellipsis.**
- d. **Add the section again with a new section order number using the 'Add Row' button.** Adding a new row will automatically enable the new section.
- e. **Repeat step 'd' until all the sections are in the desired order.**
- f. **Click Save.**

2. How to Manage the License Terms

- a. **Navigate to Configurations and select 'Manage License Terms' under Acquisitions/Licenses.** This will open up the list of the out of the box license terms available in Alma. Refer to ExLibris documentation for a list of these license terms and their descriptions.
- b. **Edit each term as desired by selecting a new option for the term in the 'License Section' or 'Display to Public' columns, or by editing the value of the 'Order in Section' column.** Out of the box license terms can be edited but can not be deleted.
- c. **Select 'Add License Term' to add a new license term if needed.** This opens the 'Add License Term' dialog box. Required fields are marked by a red asterisk.
 - i. Enter a term Name* and a unique Code*.

- ii. Select a 'License Term Type*' from the dropdown list. If the type 'Controlled Vocabulary' is chosen, you have to define the values by selecting 'Add Value'. Once the license term is saved its type can not be changed.
- iii. Select the License Section you want this term to appear in from the dropdown list.
- iv. Add a numeric value into the 'Order in Section' box to determine in which position this term will appear in the section.
- v. Check the box 'Display To Public' if this is a term you want to display to patrons on Primo.
- vi. Select 'Add and Close' to return to the 'Manage License Terms' page.
- vii. Click 'Save' on the upper right corner. Unlike the out of the box license terms, locally created terms can be deleted.
- viii. If you have selected to display some of the license terms to the public, there is one more setting that needs to be activated. Navigate to 'Other Settings' under Fulfillment configurations, in the 'Discovery Interface Display Logic' section. Check the box for 'Enable Display of License Information'.

3. How to Configure the License Storage Locations and License Review Statuses

- a. **Navigate to Configurations and select 'License Storage Location' or 'License Review Status' under Acquisitions/Licenses.** Each one will lead to a Code Table with identical functionality. With the Code Tables you can determine the values that will be available in the dropdown menus for the physical location and the review statuses of the license when creating or editing one.

- b. **Edit the codes and descriptions as desired.**
- c. **Enable or disable the locations/review statuses as desired.**
- d. **Set one of the locations/review statuses as default.**
- e. **Move up or down the locations/review statuses to determine the order in which they will appear in the dropdown menu in the licenses.**
- f. **Create new locations/review statuses by selecting 'Add Row' if necessary.**
- g. **Click 'Save'**