Licences

Introduction

Each of your subscriptions can be associated with a Licence. The licence controls the terms and conditions associated with a subscription, for example how long you are entitled to receive a subscription and other properties associated with a subscription such as who can access the content it includes and via which media.

The KB+ Licences module enables you to:

- View and search details of all your licences
- Add new licences:
  - By using templates we have created for the Jisc Collections Agreements
  - By copying and changing an existing licence, or
  - From "scratch" by entering details into a blank licence template
- Export various types of licence data (please refer to the EXPORT GUIDE for details)
- Compare licences with other licences, both yours and others (please refer to the COMPARISON TOOLS GUIDE for details)

Viewing your Licences

On the Licences panel on your Dashboard you will see the number (1) of licences you have:

Click on the Licences heading (2). The Your licences page is then displayed (see below).
Alternately, open the Licences menu and click on the Your Licences option (3):

You can also access your licences from the Recently edited Licences panel on the Dashboard:

This panel lists your 5 most recently edited licences. Click on the Recently edited Licences heading (4) to open the Your licences page.

You can also click on the names of the listed licences (5). This will open the Licence Details page for the licence (see later in the guide for information on this page).
The *Your licences* page is then displayed:

By default, the page lists ten of your licences at a time (you can change this number by editing your profile). To view more of your licences, use the options at the bottom of the page:
Licences can either be sorted in A-Z, in Z-A order, in order of start date, or in order of end date, as selected from the Sort Licences By list (1). The titles themselves are listed below (2).
Searching your Licences

You can search and filter the list of licences by using the filter search drop down in the Your licences page as described below.

To carry out a quicker search, open the Licences menu and enter the name of a licence or licences or part of their names in the search field (1):

![Licences menu]

The search results are then displayed in the Your licences page as described below.

Filtered Searches

To search your licences using the filter search drop down in the Your licences page, enter the name of a licence or licences or part of their names in the search field (1).

![Search Your Licences]

You can choose to only search for licences were valid on a selected date (the search defaults to today’s date). Enter the required date in YYYY-MM-DD format. Alternately, click on the calendar icon next to the Valid On field (2).
The Calendar pop-up is then displayed:

Select the required date and click Confirm. The date is displayed in the Valid On field (2).
If you do not want licences to be filtered by date, delete the date in the Valid On field.
Click Search (3) to carry out your search. The search results are then displayed as described below.
To clear the search criteria and results and return the complete list of your licences, click Reset (4).

Additional Filters
To refine your search further, you can filter by licence property values. Click Filter Search (1) to view this facility:

Two additional field are then displayed, Key Properties (2), and Property Value (3).
From the Key Properties drop-down, select the property you want to filter by. Enter the value of that property to filter by in Property Value field, and click Search.
Search Results

Search results are displayed in the Your licences page. The results will include all licences that have names that include the string of characters you entered in the search field, whether that’s all of a name or part of it.

For example, if you entered "medic" as the search string:

![Search Your Licences](image)

...then all licences with "medic" in their names will be returned by the search:

![You currently have 3 Licences: Showing 1 - 3 – Search Text: medic – Valid On: 2018-02-28](image)
Note the search is not case sensitive. In other words, searching against “Medic” and “medic” will return the same results.

Viewing and Editing Licence Details

The list of your licences displays their names (1), as well as basic details: start and end dates, the licensor, linked subscriptions, and the numbers of associated notes and documents (2).

To view the details of a linked subscription, click on its name. The *Subscription Details* page for it is then displayed. Refer to the *(SUBSCRIPTIONS GUIDE)* for details.

To view the key properties of the licence, i.e. those that define how it can be accessed and distributed, click the arrow next to its name (3). The properties in question are then displayed (4).
Viewing More Details of a Licence

To view full details of a licence, either click on its name at the top of the panel (1) or on the View All button (5) (see the image above).

The Licence Details page for the title is then displayed:

This page can also be accessed from the Recently edited Licences panel on the Dashboard, as described previously.

This page displays names and links to detail of associated subscriptions and packages (1), its start date, end date, status, number of related pending changes, and licensor (2). Click on the button in the Pending Changes panel (3) to view details of the pending changes. Refer to (PENDING CHANGE GUIDE) for details.

The Properties Tab

On the Properties tab, the key properties of the licence, i.e. those that define how it can be accessed and distributed, are displayed (4). Also displayed are lists of associated notes (5) and documents (6), along with facilities for adding, viewing in full, editing, and deleting them. See below for more information on these facilities.
Further down the Properties tab, under Licence Properties, details of all the properties of the licence are listed (7), along with facilities for adding, editing, and deleting them. See below for more information on these facilities.

Clicking on the Organisation Links heading (8) to view the organisations associated with the licence and their roles, along with facilities to add and remove organisations. See below for more information on these facilities.
Adding, Viewing, Editing, and Deleting Notes

The list of notes associated with a licence is displayed in the Notes panel on the Properties tab of the Licence Details page (see above):

- To add a new note, click this button 🔗. The Create New Note page is then displayed:

  ![Create New Note](image)

Enter the title, the note itself and the creator (i.e. your name or reference) in the fields provided and click Save. The Create New Note page then closes and your new note is added to the list in the Notes panel.
• To view fully view and notes and their details, click the 
button. The Notes page is then displayed:

![Notes Page]

• To edit a note, click the button next to it in the list. The Edit Note page is then displayed:

![Edit Note Page]

Change the details of the note as required, and click Save.
• To delete a note, click the button next to it in the list. The following message will then be displayed:

Click OK to complete the deletion.

**Adding, Opening, Editing, and Deleting Documents**

The list of documents associated with a licence is displayed in the *Documents* panel on the *Properties* tab of the *Licence Details* page (see above):
• To associate a document with the licence, click this button. The *Create Document* page is then displayed:

![Add Document](image)

1. **File**: Upload a file
2. **Document Type**: Select one
3. **Save**: Save the document

Enter the document and the creator (i.e. your name or reference) in the fields provided. Select the document itself by clicking *File (+)* (1). A file browser will then be displayed which you can use to locate and select the document file. The name of the select file will then be displayed next to the button.

Select the type of document (Licence, General, or Addendum) from the *Document Type* list (2). Click *Save*. The *Create Document* page then closes and the document is added to list in the *Documents* panel.

• To open and/or save a document to a different location, click on the document entry in the list. The exact procedure from this point may vary depending on the browser you are using, but you will then be given the option to open the file or save the file to a location of your choice. For example:
• To edit the name, creator, and/or displayed link of a document, click the 🆕 button next to it in the list. The Edit Document page is then displayed:

![Edit Document](image)

Change the details of the document as required, and click Save. Note that changing the file name only changes the file name displayed with the details of the document in KB+. It does not change the file name of the document or the link to the document file.

• To remove the association of a document with the licence, click the 🗑 button next to it in the list. The following message will then be displayed:

![Delete Document](image)

Click OK to complete the removal.
Adding and Deleting Properties

Details of all the properties of a licence are listed on the Properties tab, under the Licence Properties heading:

They are listed in the order that they were assigned to the licence.

- To add another property to the licence, click the Add Properties button. The Add Licence Properties page is then displayed:

Select the property from the Property list.

If you would like a user-defined licence property created, please contact the KB+ Data Managers either via the Knowledgebaseplus@jisc.ac.uk email or the green support button.
• To delete a property of the licence, click the button next to it in the list. A message such as following will then be displayed:

![Delete Property Message]

Click OK to complete the removal.

**Adding, Viewing, and Removing Linked Organisations**

The organisations linked with a licence and their roles regarding the licence are listed on the *Properties* tab, under the *Organisation Links* heading:

![Organisation Links Table]

• To link other organisations, click *Add Organisation*. The *Add Organisation Link* page is then displayed:
The page lists the organisations (institutions, content providers and publishers) in use in KB+ under the **Org Name** heading (1). Scroll through this list to find the organisation to be added.

Alternately, search for the organisation using the **Search** field (2). Enter the name of the organisation.

When you found the organisation to be added, click on its **Select** checkbox (3). A tick will then be displayed instead of the box.

If required, you can then find and select further organisations to be added in the same way.

Select the role that the organisation is to fulfil with regard to the licence from the **Role** list (4): Licensee, Licensor, Negotiator, or Licencing Consortium.

Note that:
- A role can be shared by more than one organisation
- If you have selected more than one organisation from the **Org Name** list, they will all be allocated this role
- You can choose not select a role. (5).

Finally, click **Add Organisation** (5). The **Add Organisation Link** page then closes and the organisation is added to list under the **Organisation Links** heading.
• To remove the link to an organisation, click the button next to it in the list. The following message will then be displayed:

![MessageBox](image)

Click OK to complete the removal.

**The Details Tab**

The *Details* tab displays additional general, history, and permissions details:

![Screenshot](image)

- The *Change History* panel (1) displays the number of changes and pending changes made by the KB+ team to the licence template. Click on the button to view details of these changes (see below for more information).
- The *Edit History* panel (2) displays the number of edits you have made to the licence properties. Click on the button to view details of these changes (see below for more information).
- Below these panels (3), basic licence details such as the licence URL, Licensee and Licensor references, and category, and type are displayed. See below for information on how to edit these basic details.
- If one is available, the link in the *ONIX-PL Licence* panel (3) will enable you to compare the details of the ONIX-PL version of the licence with the Jisc Collections Model Licence. Refer to the LICENCES COMPARISON TOOLS GUIDE for details.
  
  The *Unlink* button will delete the link to the ONIX-PL licence file.
• If the licence was created from a KB+ licence template, the *Incoming Licence Links* panel (4) gives the name of this template, plus a link to its the details page (otherwise it will say “None”).

Next to this link, either “Manual” or “Auto” is displayed, depending on how updates made to the licence template by the KB+ team are applied to the licence, i.e. either automatically or manually using the pending changes facility. Refer to the PENDING CHANGES GUIDE for details.

Viewing the Licence Change History

The *Change History* panel on the *Details* tab displays the number of changes and pending changes made by the KB+ team to the licence template.

To view details of these changes, click on the button. A page listing the changes is then displayed, for example:

![Change History](image)

Descriptions of all the changes are listed, along with the “outcome” (i.e. whether they are still pending, or have been accepted or rejected), and the date the change was made.

Viewing the Licence Edit History

The *Edit History* panel on the *Details* tab displays the number of edits you have made to the licence properties.
To view details of these edits, click on the button. A page listing the edits is then displayed, for example:

**Editing Basic Licence Details**

The basic details of licences, such as the licence URL and incoming licence links, Licensee and Licensor references, and category, and type and are displayed on the Details tab of the Licence Details page.

When you create a new licence “from scratch” without copying an existing licence or by using a template, these basic details will not be completed.

To add these details, or to edit them for any licence (however created), click Actions (a) at the top of the Licence Details page:
...and then click *Edit* on the menu that is then displayed:

A page displaying the current basic details of the licence is then displayed:

Add or edit these details as required, then click the *Save* button to complete the procedure. Reference is the displayed name of the licences.
Adding a New Licence

There are three ways of creating new licences:

- using templates created for the Jisc Collections Agreements
- by copying and changing an existing licence
- from “scratch” by entering details into a blank licence template

Each of these methods is described below.

Creating a Licence from a Template

To create a licence from a template, click Add (1) on the Licences panel on your Dashboard:

...or open the Licences menu and click on the Add Licence option (2):

...or click Actions (3) at the top of either the Your licences page or the Licence Details page:
...and then click *Add* on the menu that is then displayed:

![Add Licence Menu](image-url)

The *Add a licence* page is then displayed:

![Add a Licence Page](image-url)

Click on the *Copy from template* option (4). The *Copy from template* page is then displayed:

![Copy from Template Page](image-url)
The number of licence templates available for you to copy is displayed at the top of the page (1). The templates are listed below (2).

To search this list of templates, enter the name of a template or templates or part of their names in the Search Licences field (3) and click Search (4). The list of displayed templates (2) will then be filtered to only include those that have names that include the string of characters you entered in the search field.

Select the templates you want to copy by clicking its button (5).

A copy of the selected template is then created as a new licence and opened automatically in the Licence Details page. “Licence successfully created” will be displayed at the top of the page. For example:

![Image of Licence Details page]

You can now edit the properties and details of the new licence as required, as described in Viewing and Editing Licence Details above.
Creating a Licence by Copying and Changing an Existing Licence

To create a licence by copying and changing an existing licence, first open the Your licences page. You can do this by accessing the Add a licence page as described above, and then clicking on the Copy existing option (1):

... or by any of the methods described in Viewing your Licences.

Using the methods described in Viewing your Licences, find the licence you want to copy and click its button:

Associated:  Notes (0)  Documents (1)

Karger/Jisc Collections/Journals/2018-2020
2018-01-01 until 2020-12-31
Licensor: No Licensor
Linked Subscriptions: No Linked Subscriptions
Associated:  Notes (0)  Documents (1)

Springer: Jisc Collections: Compact Journals: 2017
2016-01-01 until 2018-12-31
A copy of the selected licence is then created and opened automatically in the *Licence Details* page. "Licence successfully created" will be displayed at the top of the page. For example:

You can now edit the properties and details of the new licence as required, as described in *Viewing and Editing Licence Details* above.

### Creating a Licence from a blank Licence Template

To create a new licence from “scratch” by entering details into a blank licence template, access the *Add a licence* page as described above, and then clicking on the *Add new licence* option (1):
A new “blank” licence is then created and opened automatically in the Licence Details page. “Licence successfully created” will be displayed at the top of the page. For example:

You can now define the properties and details of the new licence as required, as described in Viewing and Editing Licence Details above.
Deleting a Licence

To delete a licence, open the Your licences page and find the licence to be deleted using the methods described in Viewing your Licences.

Click the arrow next to the licence’s name (1) to reveal the additional licence details and options (2).

Click the Delete button (3). The following message will then be displayed:

Click OK to complete the deletion. Note that you can’t delete a licence if it is linked to a subscription. In this case you need to unlink them first (see SUBSCRIPTIONS GUIDE for more details)