



- Agreement information**
- Coverage
- License
- eResources
- Subscription
- Provider
- Change history

Agreement information

Expand all

Agreement name \*

Enter the agreement name

Trial

Agreement status \*

Agreement is a trial

Please select a status

Internal contacts \*

Find internal contact

External contacts

Find external contact

Coverage

License (0)

eResources

Subscription (1)

Provider

Change history

The top section "Agreement information" will be expanded by default when the new/edit agreement screen is displayed.

QUESTIONS

1. What data/details about the agreement should be immediately visible?

2. Looking at the main headings, is the order correct? e.g. Would you prefer to see Subscription information closer to the top?



- Agreement information
- Coverage
- License
- eResources
- Subscription
- Provider
- Change history

Agreement information

Expand all

Agreement name \*

Enter the agreement name

Trial

Agreement is a trial

Agreement status \*

Active

Active

Expired

Cancelled

Internal contacts \*

Find internal contact



External contacts

Find external contact



^ Coverage

^ License (0)

^ eResources

^ Subscription (1)

^ Provider

^ Change history

TRIAL

We haven't discussed trials much so far. Questions (for afterwards):

Q1. If an agreement is for a trial which parts of the agreement are not relevant?

Q2. Should it be possible to somehow record the potential cost of an agreement?

AGREEMENT STATUS

Q3. What are the statuses of an agreement? E.g. Active, Expired, Cancelled

NOTE: The Agreement Status is not the same as License Status because an agreement can be "Active" without a licence.

INTERNAL CONTACTS

Q4. Should this be mandatory?

Q5. Should its default value be the person creating the agreement?

Q6. Would you want to be able to assign a role to the person, (for this agreement)? If so, what might the roles-types be?

Q7. What about EXTERNAL CONTACTS, would you want the same information?



Agreement information

Coverage

License

eResources

Subscription

Provider

Change history

Coverage

Perpetuity

Agreement is perpetual

Agreement start date

DD/MM/YYYY

Agreement end date

DD/MM/YYYY

License (0)

eResources

Subscription (1)

Provider

Change history

DATES

Display of the agreement Date fields is dependent on the perpetuity option. A perpetual agreement will have no End Date.

Both dates are optional (based on last meeting's discussion)

Q1. Is this correct or should "Agreement start date" be mandatory?



Agreement information

Coverage

License

eResources

Subscription

Provider

Change history

License (0)

Add new license

This agreement has no license.

eResources

Subscription (1)

Provider

Change history

LICENSE

0 or 1 active license will be allowed.

You can attach a license in two ways:

- + look up a license which has already been added OR
- + add a completely new license

QUESTION: How common are the below scenarios?

1. The agreement will be created first and a license attached later
2. The agreement and licence will be created at the same time
3. The license will created before the agreement



Agreement information

Coverage

License

eResources

Subscription

Provider

Change history

License (1) Find a license

Add new license

Active license for this agreement

Change relationship Detach

eResources

Subscription (1)

Provider

Change history

Once an active license is attached, you will see:

- + some details about the active license
- + an option to view/edit the current license (via a link on the license title)
- + an option to detach/remove the license from the agreement
- + an option to change the relationship

QUESTIONS:

1. What information about the active license should be displayed on this screen (e.g. cancellation allowances etc)? Remember you will be able to view the full license record by selecting the title.

2. What terminology is best "Detach", "Remove", another term?



Agreement information

Coverage

**License**

eResources

Subscription

Provider

Change history

License (1)

Find a license

Add new license

Active license for this agreement

[Change relationship](#) [Detach](#)



Related licenses (2)

Title	Relationship to agreement	
	2016-2017 Expired annual license	<a href="#">Detach</a>
	Draft license v0.3	<a href="#">Detach</a>

^ eResources

^ Subscription (1)

^ Provider

^ Change history

RELATED LICENSES

Whilst there will only ever be one active license, there may be many "related licences". For example:

- + licences for the agreement which were active but have now expired
- + draft versions which never became active

Use case: An Elsevier agreement is for a 5 year deal. After this the library negotiates another 5 year deal. A new license would be created and attached to the agreement. The previous license would still be linked to the agreement but would be "inactive".

QUESTIONS

1. Are there other reasons for linking a license to an agreement? We are thinking here about whether "Relationship" should be a predefined set of options, a free text Description, or both.

2. What information would you want displayed here for "related licenses"? Is it different to the active license?



Agreement information

Coverage

License

**eResources**

Subscription

Provider

Change history

▼ eResources

Packages (3)

Package name	Automatically add new titles?
Libero vitae facilis elit ac fusce dui magna auctor vestibulum sed magna cras vulputate	<a href="#">Yes</a>
American Institute of Physics	<a href="#">No</a>
Nullam commodo sit qui consectetur	<a href="#">Yes</a>

^ Titles (43)

^ Subscription (1)

^ Provider

^ Change history

**PACKAGES**

Available here:

- + ability to look up and attach a package
- + a list of the packages associated with the agreement
- + ability to view attached packages (package title will be a link)

"Automatically add new titles?" is an option to automatically pull in titles when a vendor adds them to a package.

**QUESTION**

What information should be displayed about the package on this screen?

Bear in mind, you can view the full package details by following the link on the package title.



Add / edit agreement

Save

Agreement information

Coverage

License

**eResources**

Subscription

Provider

Change history

▼ eResources

Packages (3)

Package title Automatically add new titles?

Libero vitae facilis elit ac fusce dui magna auctor vestibulum sed magna cras vulputate [Yes](#)

American Institute of Physics [No](#)

Nullam commodo sit qui consectetur [Yes](#)

▼ Titles (43)

Add new title

Current Expected Previous

Title	Package	<- more details ->
AIP Conference Proceedings	None	<a href="#">Remove</a>
Applied Physics Letters	American Institute of Physics	
Applied Physics Reviews	American Institute of Physics	

MORE TITLES (scroll)

^ Subscription (1)

^ Provider

^ Change history

TITLES

These are all the titles which the agreement makes available. You can search for a title to add or add a new one. The table of titles is updated as titles are added and removed.

Packages are added via a Subscription.

QUESTIONS

1. What details about titles would be useful here? E.g. Cost?
2. Is the addition of titles here, and packages via the subscription confusing?

FILTER: Current, Expected, Previous

- The filter is there to show you:
1. Current - the titles you have access to right now.
  2. Expected - titles which are expected in the future (the publisher has notified).
  3. Previous - titles which were available but are now not.

QUESTIONS

3. How useful is this filter?
4. What about being able to filter by package, single titles, title offered through bundles etc?





Agreement information

Coverage

License

eResources

**Subscription**

Provider

Change history

▼ Subscription (0)

Find a subscription to attach 🔍

Add new subscription

This agreement has no subscription.

^ Provider

^ Change history

**SUBSCRIPTION**

There can be 0 or 1 subscription attached to an Agreement.

It has been separated out in our data model so that it can apply to print journals and memberships etc as well.



Agreement information

Coverage

License

eResources

**Subscription**

Provider

Change history

Subscription (1)

Find a subscription to attach

Add new subscription

Active subscription for this agreement

[Change relationship](#) [Detach](#)



Subscription start date	Subscription end date	Renewal priority
01/09/2017	01/09/2017	High

Costs

	Amount...	<- more details ->	Budget
Line item 1			
Line item 2			
Line item 3			

Related subscriptions (2)

Title	Relationship to agreement	
		<a href="#">Detach</a>
		<a href="#">Detach</a>

Provider

Change history

Q1. What subscription information would be useful to see here?

DATES

The renewal date will be the day after the "subscription end date".

Q2. Is this correct? Always?

RENEWAL PRIORITY

Q3. If you could give a subscription a priority to help you manage renewals, what would they be? E.g.

A. Very high, High, Medium, Low, Cancel

B. Definitely renew, For review, Definitely cancel

C. Other.....?

COSTS

A subscription can have multiple costs associated with it. Example use case: The subscription is for one year, but paid for quarterly.

Q4. What cost information would be useful here?

RELATED SUBSCRIPTIONS

If an agreement has subscriptions which are no longer active (i.e. due to renewal) they will be listed here.

Q5. What information about past subscriptions would be useful here?



Save

Agreement information

Coverage

License

eResources

Subscription

**Provider**

Change history

∨ Provider

[Redacted content]

∧ Change history

Provider / vendor / consortia are areas we haven't explored yet. We expect it will be possible to do thing such as:

Look up and attach a vendor.

Look up and attach a consortium.