

Electronic Resource Management: Report of the DLF ERM Initiative

Appendix E: Electronic Resources Management System Data Structure

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Introduction

This document is a data structure and supporting tool for understanding and interpreting the interaction between the Entity Relationship Diagram and the Data Elements Dictionary. The Data Structure maps the elements defined in the Data Elements Dictionary into the entities defined by the Entity Relationship Diagram in a way that supports the functional specifications delineated in the Functional Requirements and the workflow described in the Workflow Flowchart document. As part of a data model, the Data Structure is not intended to be absolutely prescriptive. System designers should feel free to develop their own approach to integrating the elements and entities. However, designers are cautioned from deviating too widely from the concepts of the below approach, as any deviations will need to be transformable for the purposes of data sharing and migration.

The following pieces of information may be helpful in understanding the presentation of the data model in the Electronic Resource Management System Data Structure.

Data **Elements** and **Definitions** are extracted from the Data Element Dictionary with as little variation as possible. However, some elements that are duplicates of others in concept (e.g. elements in the Prevailing Terms entity), or pointers, which are in essence a reference to another entity, may not be listed in the Data Element Dictionary.

Element Types are restricted to text, numeric, logical, date, unique ID, or pointers. Unique IDs are only used for the record identifiers in each entity. Pointers are ID elements from another entity which either supply information from that other entity where needed in the one containing the pointer, or which establish a type of relationship. For example, a one-to-many relationship requires the listing of a pointer to the ID from the “one” side of the equation in the entity of the “many” side of the equation.

System Use / Functionality is used to describe ways the system software may use or need to treat the element or the expected functionality the element is expected to fulfill. References to the outline of the Functional Requirements are made either in the Notes of an entity (for those specifications that the entire entity fulfills) or in the System Use / Functionality area. Functional Requirement outline references are made in the following form: FR#.# and those not recorded in this area are annotated in the Appendix Notes. Not all functional uses of every element are spelled out, but the annotation in the Data Structure is intended to point out the integration of the data model with the Functional Requirements document. Another use of this System Use / Functionality area is to record the binding of paired or grouped elements. Some pairs or groups are simply logical associations, as when the unit of measure should be attached to the element recording the item being measured. Other pairs or groups are functional necessities, as when the pair or group repeats as a pair or group and is actually a surrogate representation of a separate nested table of elements.

Values record the suggested possible entries for an element, or the suggested possible layout of such entries. A few value lists of extensive length are recorded as appendices. System implementers may use alternate terminology as appropriate.

The **Optionality** area records whether an element is required. The key to the abbreviations is:

- R = Required
- RA = Required if Applicable
- O = Optional

The **Repeatability** area supplies information on the unique or repeating nature of the element

The **Notes / Examples** area provides a space to clarify further details about the element or raise issues that are still unresolved.

A number of entities with lengthy lists of elements are separated into Groups for the sake of convenience and clarity. There is no functional purpose to the groupings and they may be ignored for the purpose of system design structures.

The terms *electronic product* and *electronic resource* have been shortened to *e-product* and *e-resource* throughout this document for brevity's sake; refer to the Data Dictionary, Appendix D, for full element names.

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ELECTRONIC PRODUCT SET	
Definition	Electronic Product is the superclass. It is comprised of both the Electronic Resource entity and the Interface entity.
Notes	Interfaces and Electronic Resources share many characteristics and yet have a number of differences. Thus we use two different entities and one superclass to describe these concepts.

Electronic Resource Entity							
Definition	Electronic Resource entity is part of the master set Electronic Product. It is comprised of many elements identifying or associated with an electronic resource. An electronic resource is: "Material encoded for manipulation by computer, including texts, sounds, images, numeric data, computer programs, etc. alone or in combination, as well as materials that require the use of peripheral devices directly connected to a computer (e.g. CD-ROM drive or player) or that require a connection to a computer network (e.g. the Internet)."						
Notes	Elements may be derived from other linked entities as appropriate. Electronic Resource is one of two subsets of the Electronic Product set; for some entities an id from either its sibling Interface or from Electronic Resource must be present, but both are not always required. An E-Resource may be the top-level record in a parent-child hierarchy or a child within a hierarchy.						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource ID</i>	The identification number assigned to the E-Resource by the electronic resource management system	unique ID	system generated identifier		R	N	This should be considered a unique local identifier. Links an Electronic Resource record to other data.

Electronic Resource Entity Identifier Group							
Definition:	Identifier information about the described object						
Elements	<i>Work Associated With Electronic Resource, Electronic Resource Acquisition, Electronic Resource Prevailing Terms, Electronic Resource Access Information, Electronic Resource Administrative Information, OCLC Number, Electronic International Standard Serial Number, Electronic International Standard Book Number, Digital Object Identifier, Local System Number, Subscription Identifier, Other Identifier Source, Other Identifier Number</i>						
Notes	FR21						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Work Associated With Electronic Resource</i>	The work from which the resource has been derived	pointer	FR8	ID from the Work entity	RA	N	May point to a record in an external system. See the note for the Work entity.
<i>Electronic Resource Acquisition</i>	The business agreement which has made the resource available to the collection	pointer	FR1, FR2	ID from Acquisition entity	RA	N	It can be inherited from a parent e-resource or associated interface

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Electronic Resource Entity Identifier Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource Prevailing Terms</i>	The business and legal terms under which the e-resource is licensed and acquired	pointer	FR1, FR2	ID from the Prevailing Terms entity	RA	N	
<i>Electronic Resource Access Information</i>	The access information associated with the electronic resource	pointer	FR14, FR15, FR16, FR17	ID from Access Information entity.	RA	N	
<i>Electronic Resource Administrative Information</i>	The administrative information associated with the e-resource	pointer	FR38, FR39, FR40, FR41	ID from Administrative Information entity	RA	N	
<i>OCLC Number</i>	The unique record number assigned to a bibliographic record by the OCLC cataloging utility	numeric	FR8, FR13		O	N	Other system numbers can be locally defined and recorded in other identifier elements
<i>Electronic International Standard Serial Number</i>	The ISSN assigned to an e-resource	text	FR8, FR13	Layout: ISSN. ISO Standard 3297-1975; ANSI Z39.9-1979.	RA	N	If there is no assigned electronic ISSN, institutions may repeat print ISSN or leave element value blank. The Print ISSN data element resides in the Print Version entity.
<i>Electronic International Standard Book Number</i>	The ISBN assigned to the e-resource	text	FR8, FR13	Layout: ISBN. ISO Standard 2108.	RA	N	If there is no assigned electronic ISBN, institutions may repeat print ISBN or leave element value blank. The Print ISBN data element resides in the Print Version entity.
<i>Digital Object Identifier</i>	A digital identifier for any object of intellectual property	text		Layout: DOI. ANSI/NISO Z39.84-2000 Syntax for the Digital Object	O	N	Source of definition: DOI Home page, at: http://www.doi.org/faq.html#1 . This element is included on the assumption that the DOI will be assigned to digital objects above the article level. May be required for particular applications.
<i>Local System Number</i>	The record number that is assigned by a local library management system (LMS) to the bibliographic record	text	FR5, FR8, FR12	Site-defined	O	N	
<i>Subscription Identifier</i>	An identifier assigned to the resource by a publisher or like organization intended to verify the library's subscription to the resource	text	FR38.2		RA	N	For use when a vendor provides a subscriber number or other product-specific account number to enable registration or activation of an Electronic Product.

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Electronic Resource Entity Identifier Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Other Identifier Source</i>	The name of another source which supplies an identifier number for a resource	text	Paired element with Other Identifier Number FR7.3, FR8		O	Y	This data element allows sites to locally assign and utilize system identifiers other than those defined by this model
<i>Other Identifier Number</i>	A number assigned to the resource by a locally defined source	text	Paired element with Other Identifier Source FR7.3, FR8		O	Y	This data element allows sites to locally assign and utilize system identifier numbers other than those defined by this model. e.g., Ebsco title number

Electronic Resource Entity Title Group							
Definition:	A name by which the resource is known						
Elements	<i>Electronic Resource Title, Electronic Resource Alternate Title</i>						
Note	Descriptive elements may be derived from an external source, e.g. from a MARC record. FR5, FR12, FR19						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource Title</i>	The word or group of words that name an electronic resource.	text	Used for display and resource discovery. May be derived from an external data source or locally assigned. FR5		R	N	The electronic resource title should be taken from the chief source of information (usually a title screen; the title proper of an e-resource); if access to the resource is not possible, use the title as given from the supplier of the e-resource
<i>Electronic Resource Alternate Title</i>	A variation in the title proper of the resource, including acronyms, parallel titles, titles in other languages, etc.	text	Used for display and resource discovery. May be derived from an external data source or locally assigned. FR5		O	Y	

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Electronic Resource Entity Linked Resources Group							
Definition:	Relationships between resources						
Elements	<i>Electronic Resource Interface, Electronic Resource Contained By, Electronic Resource Contains</i>						
Note	FR1, FR2, FR9						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource Interface</i>	The interface through which the electronic resource is made available	pointer	FR1, FR2	ID from Interface entity	R	N	All resources are made available through a single interface, even if that interface provides access to only one electronic resource. Otherwise “identical” electronic resources delivered via different interfaces are different e-resources and require separate records.
<i>Electronic Resource Contained By</i>	A collective resource consisting of one or more electronic titles licensed as an entity or group, of which this electronic resource is a constituent part	pointer	FR1, FR2	ID from Electronic Resource entity	RA	N	This element points to another record in the Electronic Resource entity: “a parent”
<i>Electronic Resource Contains</i>	The electronic titles that are components of the collective resource described	pointer	FR1, FR2	ID from Electronic Resource entity	RA	Y	This element points to another record in the Electronic Resource entity: “a child.” Some system designers may choose to only point in one direction (to the parent electronic resource from the children but not vice-versa.)

Electronic Resource Entity Other Description Group							
Definition:	Other descriptive information about the described resource						
Elements	<i>Electronic Resource Package Type, Language, Format, Resource Type, Update Frequency, Description, Public Note</i>						
Notes	FR7						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource Package Type</i>	Indicates whether the electronic resource package is complete (all titles available) or partial (selected titles)	text	Use when electronic resource is a package	Partial / Complete	RA	N	Permits retrieval of materials where all titles are acquired vs. partial acquisition of offerings from that provider or package or aggregation. Information about whether a resource represents a fixed or selective bundle is necessary for acquisitions and collection development, troubleshooting and support, and interoperation with external data providers or services.

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Electronic Resource Entity Other Description Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Language	The predominant language(s) of the resource	text	Value should default to English	code values from ISO 639-2 (three-letter language code)	O	Y	Examples include "eng" for English, "akk" for Akkadian. Derive from print version if print version exists. May use another standard for language code values (e.g. RFC3066) at the preference of the system designer as long as translation routines are available.
Format	The form of presentation of a resource	text		restricted to a canonical list of formats (site-defined)	O	Y	Examples of electronic formats include descriptions of text (e.g., ascii); images (e.g., jpeg); audio (e.g., basic)
Resource Type	A categorization of an item according to its physical or intellectual characteristics	text		restricted to a canonical list of types (site-defined)	O	Y	Examples include: electronic journals, atlases, book reviews, software, video, government documents, etc. As a real-life example of "types" used in an electronic resource discovery tool, see UCSD's list for SAGE at: http://libraries.ucsd.edu/sage/types.html
Update Frequency	The interval of time at which new data is added to an ongoing e-resource	text		MARC Holdings Format codes http://www.loc.gov/marc/holdings/echdcapt.html	O	N	The update frequency may or may not be the same as publication frequency
Description	An account of the content of the resource	text	Use for public display in online catalogs and portals		O	N	The description may include pointers to other relevant objects (e.g., tables of contents)
Public Note	Additional information regarding the resource that is intended for public use	text	Use for public display in online catalogs and portals FR7.2		O	N	

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Electronic Resource Entity Holdings Group							
Definition:	Holdings information about the described resource						
Elements	<i>Electronic Holdings, Embargo Period</i>						
Notes	FR13.2, FR13.3						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Holdings</i>	The extent of material that is made electronically available	text	Actionable information about coverages for use in communicating with other systems (such as OpenURL resolvers, etc.	Layout: ANSI/NISO Z39.71 MARC21 holdings format	R	N	Layout standard is preferred. XML holdings schema produced by Joint Working Party will be substituted here when it is released.
<i>Embargo Period</i>	The amount of time by which content is intentionally delayed	numeric		expressed in days	RA	N	Refer to developing standards, e.g. Onix for serials. This could be implemented with a pre-defined list, e.g. 30, 60, 90, 180, 365, etc.

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Electronic Resource Entity Status Group							
Definition:	Status information about the described resource						
Elements	<i>Electronic Resource Status, Electronic Resource Suppression Indicator</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource Status</i>	The current standing, or status in the workflow of the electronic resource	text	If value is Rejected or Retired, Electronic Resource should not appear in public lists of available resources FR19, FR24, FR30	New request / Under evaluation / On trial / Recommended / Approved for purchase / Selection rejected / Ordered / Implementation in process / Active / Under review / Retired / Perpetual archive	R	N	Values are examples and can/should be defined and/or expanded by local institutions
<i>Electronic Resource Suppression Indicator</i>	Indicates whether the resource has been hidden from public view	logical	Removing from public view temporarily FR22	Yes / No	R	N	

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Interface Entity							
Definition	Interface entity is part of the master set Electronic Product. It is comprised of many elements identifying or associated with the interface of an electronic resource. An interface is the software platform or website through which a particular electronic resource is made available.						
Elements	<i>Interface ID, Interface Acquisition, Interface Prevailing Terms, Interface Access Information, Interface Administrative Information, Interface Name, Interface Digital Object Identifier, Interface Other Identifier Source, Interface Other Identifier Number, Interface Provider, Medium, Interface Status, Interface Public Note</i>						
Notes	Elements may be derived from other linked entities as appropriate. Interface is one of two subsets of the Electronic Product set; for some bridge entities an id from either its sibling Electronic Resource or from Interface must be present, but both are not always required. FR19						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Interface ID	The identification number assigned to the interface by the electronic resource management system	unique ID	system generated identifier		R	N	This should be considered a unique local identifier. Links an Interface record to other data.
Interface Acquisition	The acquisition which has made the interface available to the collection	pointer		ID from Acquisition entity	RA	N	
Interface Prevailing Terms	The business and legal terms under which the interface is licensed and acquired	pointer	FR1, FR2	ID from the Prevailing Terms entity	RA	N	
Interface Access Information	The access information associated with the interface	pointer		ID from Access Information entity	RA	N	
Interface Administrative Information	The administrative information associated with the interface	pointer		ID from Administrative Information entity	RA	N	
Interface Name	The word or group of words that name an interface	text	Used for display and resource discovery FR5, FR19		R	N	If an interface is unnamed, a name can be locally assigned
Interface Digital Object Identifier	The Digital Object Identifier (DOI) assigned to the Interface	text		Layout: DOI. ANSI/NISO Z39.84-2000 Syntax for the Digital Object	O	N	This element is included on the assumption that DOIs will be available for objects above the article level

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Interface Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Interface Other Identifier Source	Identifies a system which supplies an identifier for an interface	text	Paired element with Interface Other Identifier FR7.3		O	Y	
Interface Other Identifier Number	A number assigned to an interface by an external system	text	Paired element with Interface Other Identifier Source FR7.3		O	Y	
Interface Provider	The service that brings the content to your server or puts it on the Web and provides electronic access	pointer	FR19	ID from Organization entity	R	N	May be different from the publisher or vendor and may or may not require an additional payment
Medium	The agent of presentation of the interface	text		restricted to a canonical list of media types, (site-defined or taken from an external authoritative list)	O	N	Examples include: Online, CD-ROM, DVD-ROM, etc.
Interface Status	The current standing, or status in the workflow for the interface	text	If value is Rejected or Retired, interface should not appear in public lists of available resources FR24, FR30	New request / Under evaluation / On trial / Recommended / Approved for purchase / Selection rejected / Ordered / Implementation in process / Active / Under review / Retired / Perpetuated archive	R	N	Values are examples and can/should be defined and/or expanded by local institutions
Interface Public Note	Additional information regarding the interface that is intended for public use	text	Use for public display in online catalogs and portals FR7.2, FR8, FR9		O	N	

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Acquisition Entity							
Definition	Information about the business agreement that has made the Electronic Product available to the collection. An acquisition may be of a product that does not have a cost associated with its purchase.						
Notes	Information about Access, Administrative issues, Terms, and Licenses are all recorded in separate entities						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes/Examples
<i>Acquisition ID</i>	The identification number assigned to the Acquisition by the electronic resource management system	unique ID	system generated identifier		R	N	Links an Acquisition record to other data

Acquisition Entity Identifier Group							
Definition:	Identifiers associated with the acquisition						
Elements	<i>Acquisition Vendor, Purchase Order Number</i>						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Acquisition Vendor</i>	The vendor that is selling or making available the Electronic Product	pointer		ID from the Organization entity	R	N	
<i>Purchase Order Number</i>	The number assigned to the purchase order of a product	text	Link to LMS acquisitions module data FR44.1.2		O	N	Probably informed by or linked to an acquisitions system

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Acquisition Entity Consortial Group							
Definition:	Information about the consortial aspect of the acquisition, if acquisition is via a consortium						
Elements	<i>Consortial Agreement Indicator</i>						
Note	The involved consortium is recorded in the Consortial Participation bridge entity.						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Consortial Agreement Indicator</i>	Indicates whether an acquisition falls under a multiparty agreement that uses the same license for all parties	logical	May be used to generate reports about consortial agreements or to trigger certain actions, e.g. route messages to a consortial liaison FR19, FR45.1	Yes / No	RA	N	

Acquisition Entity Renewal and Termination Group							
Definition:	Used to manage information about the renewal or termination of an acquisition						
Elements	<i>Purchase Renewal Date, Purchase Renewal Tickler, Renewal Status, Renewal Decision Date, Termination Date, Termination Reason</i>						
Note	FR46, FR47						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Purchase Renewal Date</i>	The date on which the subscription will expire if it is not renewed	date	It should be possible to update this date automatically if a renewal payment is made within the system FR46.1		RA	N	For multi-year agreements, the Purchase Renewal Date may differ from the License Renewal date
<i>Purchase Renewal Tickler</i>	The advance notice interval, specified in days, desired by the library to warn of an upcoming purchase renewal date	numeric	Generates a notification to designated library staff FR46.2		O	N	

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Acquisition Entity Renewal and Termination Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Optionality	Repeatability	Notes / Examples
Renewal Status	The status associated with a renewal evaluation or retention process for a product	text	FR46.5	Under review / On hold / Cancelled / Renewed / Approved for renewal	O	N	
Renewal Decision Date	The date on which the decision to renew a subscription must be made	date	FR46.5		RA	N	
Termination Date	The date on which a subscription was terminated	date	FR47.3		RA	N	May or may not be the same as a renewal expiration date, since some acquisitions permit early termination by one or the other parties
Termination Reason	The reason a subscription was terminated	text	FR47.3, FR47.4		O	N	

Acquisition Entity Price and Payment Group							
Definition:	Information about pricing and payments for an acquisition						
Elements	<i>Price, Discount On Print, Pricing Model, Print Cancellation Restriction Indicator, Print Cancellation Note, Price Cap, Payment Detail, Payment Note</i>						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Optionality	Repeatability	Notes / Examples
Price	The amount paid for the product	numeric			O	N	This should be a hook into LMS acquisitions module if possible
Discount On Price	A discount in price or in pricing formula	numeric	Informational-not intended for system to act upon		O	N	Discounts due to consortial arrangements can be recorded here, as well as other discounts offered from a "list" price
Pricing Model	A description of the fee structure applicable to the product	text	FR43.1		O	N	
Print Cancellation Restriction Indicator	Any restriction(s) on canceling print versions of electronic titles covered by a license	logical	FR43.4	Yes / No	RA	N	
Print Cancellation Note	Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license	text	FR7.2, FR43.4		RA	N	
Price Cap	The maximum percentage of annual increase in a multi-year agreement	text	FR43.5		RA	Y	The actual percentage can vary from year to year

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Acquisition Entity Price and Payment Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Payment Detail</i>	Information about the specifics of payment at an institution	text	FR44.1.3		O	N	e.g., shared funding. Could be used for automatic calculation of payment amounts based on percentages.
<i>Payment Note</i>	Additional information about payment	text	FR7.2, FR44.1.3		O	N	

Acquisition Entity Local Group							
Definition:	Used to record local information about this acquisition						
Elements	<i>Acquisition Note, Locally Defined Acquisition Fields</i>						
Note	Other elements may be needed to cover more aspects of acquisition information but have not yet been defined in detail						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Acquisition Note</i>	Additional information about the acquisition	text	FR7.2		O	N	
<i>Locally Defined Acquisition Fields</i>	Flexible and locally definable fields for controlling information related to purchase and business activities	text	FR7.1		O	Y	

License Entity							
Definition:	Information from the legal document, a contractual agreement, that defines the terms and conditions of use for the product and the relationship between the grantor (licensor) and the licensee						
Notes	FR19						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>License ID</i>	The identification number assigned to the License by the electronic resource management system	unique ID	system generated identifier		R	N	Links a License record to other data

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License Entity Identifier Group							
Definition:	Identifier information from the license						
Elements	<i>License Name, License Type, License Uniform Resource Identifier, License Uniform Resource Identifier Type, Physical License Location</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>License Name</i>	The locally-assigned name of the license agreement	text	Used for display in administrative contexts FR19		O	N	How it is referred to
<i>License Type</i>	The kind of license that governs access to the product	text	FR35	Negotiated / Click-through / Manifest assent / Shrinkwrap	R	N	
<i>License Uniform Resource Identifier</i>	The URI at which the license agreement is made available	text	Hypertext link functionality. Generally used for posting online. Paired element with License Uniform Resource Identifier Type. FR36	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	O	N	e.g., A redacted version of the agreement (minus the business terms)
<i>License Uniform Resource Identifier Type</i>	The type of URI being used to locate the license agreement	text	Paired element with License Uniform Resource Identifier FR36	URL, URN, etc.	O	N	
<i>Physical License Location</i>	The place where a printed or other tangible instance of the license is stored	text	FR35	site-definable list	O	N	

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License Entity Review Group							
Definition:	Information for managing license review						
Elements	<i>License Status, License Reviewer, License Reviewer Note, Licensing Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>License Status</i>	The current standing, or status in the workflow of the license	text	FR25, FR26	Awaiting vendor generic license / Under local review / In negotiation / Pending vendor response / Pending local response / Approved locally / Final version awaiting local signature / Final version awaiting licensor signature / Final legal version received / Electronic version created / Redacted version created / Retired	R	N	Values are examples and can/should be defined by the local institution
<i>License Reviewer</i>	An individual reviewing the license for the local institution or consortium	pointer	Paired element with License Reviewer Note FR25, FR26	ID from Contact entity	R	Y	
<i>License Reviewer Note</i>	Comments recorded by the license reviewer regarding the license	text	Paired element with License Reviewer FR25, FR26		O	Y	
<i>Licensing Note</i>	Additional information regarding the license, the negotiation of the license, the product, etc.	text	FR7.2, FR25		O	N	

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License Entity Date Group							
Definition:	Date and duration information about the described license						
Elements	<i>License Execution Date, License Start Date, License End Date, License End Date Tickler, License Duration</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>License Execution Date</i>	The date on which the license was signed or otherwise agreed to by the licensee	date	FR35	Layout: YYYY-MM-DD. ISO 8601 [W3CDTF] http://www.w3.org/TR/NOTE-datetime	R	N	e.g., the date assented to for a click-through license
<i>License Start Date</i>	The date on which a license agreement goes into effect	date	FR35	Layout: YYYY-MM-DD. ISO 8601 [W3CDTF] http://www.w3.org/TR/NOTE-datetime	O	N	If not available or obvious, may be left blank and assumed to be License Execution Date. The license start date does not change when a license is automatically renewed.
<i>License End Date</i>	The date on which a license agreement terminates	date	It should be possible to update this date automatically if a renewal payment is made within the system FR35	Layout: YYYY-MM-DD. ISO 8601 [W3CDTF] http://www.w3.org/TR/NOTE-datetime	RA	N	This may be extended with renewals. For license agreements that automatically renew, the license end date is extended when a renewal invoice for one or more linked e-products is paid.
<i>License End Date Tickler</i>	The advance notice interval, in days, desired by the library to warn of an upcoming license end date	numeric	Used to generate an alert notice before license ends. Can be auto-calculated from the Renewal Notice Period. FR35	expressed in days	O	N	
<i>License Duration</i>	The period of time covered by the license agreement	numeric	FR35	expressed in days	O	N	Permits calculations

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License Entity Parties Group							
Definition:	Information about the parties to the described license						
Elements	<i>Licensor, Licensee, Licensing Agent, License Delivery Instruction</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Licensor</i>	1. One who grants a license to another. 2. The party who formulates the terms and conditions of use for the product with whom the licensee (purchaser) is bound in contract by signing or otherwise assenting to a license agreement.	pointer	FR19, FR35	ID from Organization entity	R	N	
<i>Licensee</i>	1. One to whom a license is granted. 2. The legal party who signs or otherwise assents to the license.	pointer	FR19, FR35	ID from Organization entity	R	N	Licensee will usually be the local institution or one of its constituent parts, or a consortium of which the institution is a member. Default value should be a defined norm for the local institution.
<i>Licensing Agent</i>	An organization (such as a subscription agent) or an individual that facilitates a licensing transaction on behalf of one or more parties	pointer	FR26	ID from Organization entity	O	N	Although the licensing agent may also be the vendor, the vendor role is not represented here, but is covered in the Acquisitions entity. The agent may or may not serve in one or more of the following capacities: as negotiating intermediary, with or without a fee for services; as the vendor who accepts payment for the product; or as the named licensee for a particular agreement.
<i>License Delivery Instruction</i>	The required medium in which official communications must be delivered	text		Paper / Fax / Email / Certified mail	RA	Y	It may be necessary to more clearly specify when registered / certified / or hard copy is required as a follow-up to other forms of notice

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License Entity Linked Licenses Group							
Definition:	Relationships between licenses						
Elements	<i>License Replaced By, License Replaces</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>License Replaced By</i>	The license agreement that succeeds a superseded agreement	pointer	FR37.2, FR47.6	ID from License entity	O	N	A link to a succeeding license agreement may be necessary for auditing purposes
<i>License Replaces</i>	The license agreement which preceded the current agreement	pointer	FR37.2, FR47.6	ID from License entity	O	N	A link to a previous agreement may be needed for auditing purposes

Electronic Product / License Bridge Entity							
Definition:	Clarifies license relationships when a single product falls under a different or additional license to that of its parent package						
Elements	<i>Electronic Resource License ID, Electronic Resource Licensed, Interface Licensed, License For Electronic Product</i>						
Notes	If a product requires a license for a trial, institutions may later wish to replace the trial license information record with the production license version if they acquire the product. FR1, FR2, FR6, FR19						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource License ID</i>	The identification number assigned to each bridge record by the electronic resource management system	unique ID	system generated identifier		R	N	
<i>Electronic Resource Licensed</i>	The electronic resource being licensed	pointer		ID from Electronic Resource entity	RA	N	Use either an Electronic Resource ID or an Interface ID but not both in one record
<i>Interface Licensed</i>	The interface being licensed	pointer		ID from Interface entity	RA	N	Use either an Electronic Resource ID or an Interface ID but not both in one record
<i>License For Electronic Product</i>	The license that governs the Electronic Product	pointer		ID from License entity	R	N	

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Terms Defined Entity							
Definition:	The business or legal terms under which the Electronic Product is licensed or acquired						
Note	Note that the data structure includes both a Terms Defined entity as well as a Prevailing Terms entity. These two entities are very similar but have different functions: Terms Defined are the terms as defined by one license or by one business agreement. It may occur that among several Terms Defined instances that apply to a single Electronic Product, some of the individual terms are in conflict; therefore, it is necessary to determine which terms are in force for the product. The Prevailing Terms consist of pointers to the appropriate Terms Defined elements that actually apply to an Electronic Product. FR6, FR35						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Terms Defined ID</i>	The identification number assigned to each Terms Defined record by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Terms Defined record to other data

Terms Defined Entity Identifier Group							
Definition:	Identification information about this set of terms						
Elements	<i>Acquisition Creating Terms, License Creating Terms</i>						
Note	If there are no terms at all for using the product, this entity and the Prevailing Terms entity simply may not have records associated with a particular Electronic Product.						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Acquisition Creating Terms</i>	Which business agreement created the terms associated with the record	pointer	FR43.2	ID from Acquisition entity	RA	N	Use either Acquisition ID or License ID but not both in one record
<i>License Creating Terms</i>	Which license agreement created the terms associated with this record	pointer		ID from License entity	RA	N	Use either Acquisition ID or License ID but not both in one record

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Terms Defined Entity Amount Group							
Definition:	Quoted cost information about the Electronic Product defined by this set of terms						
Elements	<i>Amount, Amount Note</i>						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Amount</i>	The contractually specified price for the Electronic Product	numeric	Paired element with Amount Note		O	Y	May not be equal to the sum paid as recorded in the price element. Repeating because it may be necessary to differentiate between one-time and ongoing quotes for the same product.
<i>Amount Note</i>	Information relating to the amount quoted for the Electronic Product	text	Paired element with Amount FR7.2		O	Y	

Terms Defined Entity Authorized User Group							
Definition:	Authorized user information about the Electronic Product defined by this set of terms						
Elements	<i>Authorized User Definition, Local Authorized User Definition Indicator</i>						
Note	FR33						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Authorized User Definition</i>	The language in the contract that defines the group of users allowed to use the Electronic Product	text	FR33		O	N	For academic libraries, the preferred definition is typically expressed in terms of students, faculty, and staff regardless of location, as well as on-site users of the libraries or other campus facilities. To be consulted by library staff when questions about the precise nature of the authorized user community arise. Inclusion of this may be desirable when authorized user definitions are nuanced or unusual.
<i>Local Authorized User Definition Indicator</i>	The inclusion of an institution-specific preferred authorized user definition	logical	FR33	Yes / No	O	N	A "Yes" would mean the then local authorized user definition was included in the agreement. Used to flag license agreements for possible review should local requirements change (or to attempt to renegotiate local language where lacking.)

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Terms Defined Entity Terms of Use Group							
Definition:	Terms of use information from the described agreement						
Elements	<i>Fair Use Clause Indicator, All Rights Reserved Indicator, Database Protection Override Clause Indicator, Citation Requirement Detail, Digitally Copy, Digitally Copy Term Note, Print Copy, Print Copy Term Note, Scholarly Sharing, Scholarly Sharing Term Note, Distance Education, Distance Education Term Note, Interlibrary Loan Print Or Fax, Interlibrary Loan Secure Electronic Transmission, Interlibrary Loan Electronic, Interlibrary Loan Record Keeping Required Indicator, Interlibrary Loan Term Note, Course Reserve Print, Course Reserve Electronic / Cached Copy, Course Reserve Term Note, Electronic Link, Electronic Link Term Note, Course Pack Print, Course Pack Electronic, Course Pack Term Note, Remote Access, Walk-In User Term Note, Local Use Permission Term Fields</i>						
Notes	Permitted (interpreted) and Prohibited (interpreted) values for many of these elements refer to situations where the license is silent or ambiguous on the topic of the specific term element and the local institution chooses to interpret that silence or ambiguity as either a permission or a prohibition to engage in the described activity. FR6.2, FR32, FR35						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Fair Use Clause Indicator</i>	A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section 107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law	logical	For staff display	Present / Absent	RA	N	Fair use rights include, but are not limited to, printing, downloading, and copying. Most applicable for U.S. libraries but may be of interest for other countries when recording terms for products licensed by U.S. businesses.
<i>All Rights Reserved Indicator</i>	A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor	logical	For staff display	Present / Absent	RA	N	
<i>Database Protection Override Clause Indicator</i>	A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law	logical	For staff display	Present / Absent	RA	N	Most applicable for U.S. libraries but may be of interest for other countries when recording terms for products licensed by U.S. businesses
<i>Citation Requirement Detail</i>	A specification of the required or recommended form of citation	text	FR6.2.3		RA	N	

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Terms Defined Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Digitally Copy</i>	The right of the licensee and authorized users to download and digitally copy a portion of the licensed materials	text	May be used to generate staff and user displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	
<i>Digitally Copy Term Note</i>	Information which qualifies a permissions statement on Digitally Copy	text	FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
<i>Print Copy</i>	The right of the licensee and authorized users to print a portion of the licensed materials	text	May be used to generate staff and user displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	
<i>Print Copy Term Note</i>	Information which qualifies a permissions statement on Print Copy	text	FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
<i>Scholarly Sharing</i>	The right of authorized users and/or the licensee to transmit hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific or professional use	text	May be used to generate staff and user displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	

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Terms Defined Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Scholarly Sharing Term Note</i>	Information which qualifies a permissions statement on Scholarly Sharing	text	FR6.2.1, FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
<i>Distance Education</i>	The right to use licensed materials in distance education	text	May be used to generate both staff and user displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	
<i>Distance Education Term Note</i>	Information which qualifies a permissions statement on Distance Education	text	FR6.2.1, FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
<i>Interlibrary Loan Print Or Fax</i>	The right to provide the licensed materials via interlibrary loan by way of print copies or facsimile transmission	text	Used to generate staff displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	
<i>Interlibrary Loan Secure Electronic Transmission</i>	The right to provide the license materials via interlibrary loan by way of secure electronic transmission	text	Used to generate staff displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	

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Terms Defined Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Interlibrary Loan Electronic</i>	The right to provide the licensed materials via interlibrary loan by way of electronic copies	text	Used to generate staff displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	
<i>Interlibrary Loan Record Keeping Required Indicator</i>	The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request	logical	Used to generate staff displays	Yes / No	O	N	If providing ILL reports to the licensor at periodic intervals is necessary, use Interlibrary Loan Term Note to record the interval required
<i>Interlibrary Loan Term Note</i>	Additional information related to interlibrary loan	text	Used to generate staff displays FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
<i>Course Reserve Print</i>	The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction	text	Used to generate staff displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	

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Terms Defined Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Course Reserve Electronic / Cached Copy	The right to make electronic copies of the licensed materials and store them on a secure network	text	Used to generate staff displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	e.g., book chapters, journal articles stored on a secure network, for course reserves and online course websites
Course Reserve Term Note	Information which qualifies a permissions statement on Course Reserves	text	FR6.2.1, FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
Electronic Link	The right to link to the licensed material	text	Used to generate staff displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	O	N	
Electronic Link Term Note	Information which qualifies a permissions statement on Electronic Links	text	FR6.2.1, FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
Course Pack Print	The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction	text	May be used to generate both staff and public displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	RA	N	e.g., book chapters, journal articles

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Terms Defined Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Course Pack Electronic	The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction	text	May be used to generate both staff and public displays FR6.2.1	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	O	N	e.g., book chapters, journal articles
Course Pack Term Note	Information which qualifies a permissions statement on Course Packs	text	FR6.2.1, FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
Remote Access	The right of an authorized user to gain access to an E-Product from an offsite location	text	Default to All but Walkins	Yes / No / All but Walkins	R	N	
Walk-In User Term Note	Information which qualifies the status or permitted actions of Walk-In Users	text	FR6.1, FR7.2		O	N	Can be used to describe local practice for interpretation in instances such as this one
Local Use Permission Term Fields	Flexible and locally definable fields for defining new permitted use terms	text	FR7.1, FR32.2		O	Y	It should be possible for each of these fields associated to define actions such as public displays, reports, and alerts

Terms Defined Entity Restrictions Group							
Definition:	Restrictions information from the described agreement						
Elements	<i>Concurrent User, Pooled Concurrent Users, Concurrent User Note, Other User Restriction Note, Other Use Restriction Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Concurrent User	1. The licensed number of concurrent users for a resource. 2. The number of concurrent users if shared across an interface rather than for a specific resource.	numeric	May be used to generate staff displays FR38.4		RA	N	

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Terms Defined Entity Restrictions Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Pooled Concurrent Users</i>	The number of concurrent users if shared across a consortium rather than within a specific institution	numeric	FR38.4		RA	N	
<i>Concurrent User Note</i>	1. A specific explanation of how users are allocated or shared if pooled or platform-based. 2. Additional information about the number of concurrent users.	text	FR7.2, FR38.4		O	N	
<i>Other User Restriction Note</i>	Additional information about other user restrictions not adequately described elsewhere	text	FR7.2, FR33		RA	N	e.g., restrictions on users located outside of United States or relevant country of institution
<i>Other Use Restriction Note</i>	Additional information about other use restrictions not adequately described elsewhere	text	FR6.2.2, FR32		RA	N	e.g., time of day restrictions on Concurrent Users

Terms Defined Entity Perpetual Rights Group							
Definition:	Perpetual rights information from the described agreement						
Elements	<i>Perpetual Access Right, Perpetual Access Holdings, Perpetual Access Note, Archiving Right, Archiving Format, Archiving Note</i>						
Notes	FR47.7						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Perpetual Access Right</i>	The right to permanently access the licensed materials paid for during the period of the license agreement	text	For staff display FR37.1, FR47.7	Yes / No / Undetermined	R	N	May be used to trigger action or notification if license is terminated or product is cancelled or withdrawn
<i>Perpetual Access Holdings</i>	The dates of coverage for which perpetual rights are available and agreed upon in the legal contract	text	For staff display FR37.1, FR47.7	Layout: ANSI/NISO Z39.71	RA	N	Used only if Perpetual Access Right is yes. Dates will generally be open while license is current, closed if license terminates or resource intellectual property rights are transferred to another organization. Layout standard is preferred. XML holdings schema produced by Joint Working Party will be substituted here when it is released.
<i>Perpetual Access Note</i>	Additional information related to perpetual access	text	For staff display FR7.2, FR37.1, FR47.7		O	N	

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Terms Defined Entity Perpetual Rights Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Archiving Right</i>	The right to permanently retain an electronic copy of the licensed materials	text	FR37.1, FR47.7	Yes / No / Undetermined	RA	N	
<i>Archiving Format</i>	The format of the archival content	text	Multiple values permitted FR37.1, FR47.7	Remote / CDROM / Tape / Unspecified tangible format	RA	N	Archiving Format values should be site-definable by the local institution
<i>Archiving Note</i>	Additional information related to archiving rights, product and format	text	FR7.2, FR37.1, FR47.7		RA	N	

Terms Defined Entity Obligations Group							
Definition:	General obligations described in the license or business agreement						
Elements	<i>Accessibility Compliance Indicator, Completeness Of Content Clause Indicator, Concurrency With Print Version Clause Indicator, Intellectual Property Warranty Indicator, Confidentiality Of User Information Indicator, UCITA Override Clause Indicator, Clickwrap Modification Clause Indicator, Indemnification By Licensor Clause, Indemnification By Licensee Clause Indicator, Indemnification Clause Note, Confidentiality Of Agreement, Confidentiality Of Agreement Note, Governing Law, Governing Jurisdiction, Applicable Copyright Law, Cure Period For Breach, Cure Period For Breach Unit Of Measure, Content Warranty, Performance Warranty Indicator, Performance Warranty Uptime Guarantee, Maintenance Window, Renewal Type, Non-Renewal Notice Period, Non-Renewal Notice Period Unit Of Measure</i>						
Notes	FR35						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Accessibility Compliance Indicator</i>	An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation	logical	FR35	Yes / No	RA	N	For more information, see guidelines set forth by the World Wide Web Consortium at http://www.w3.org/wai
<i>Completeness Of Content Clause Indicator</i>	The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the print equivalent	logical	FR35	Present / Absent	RA	N	
<i>Concurrency With Print Version Clause Indicator</i>	The presence of a provision in the contract which states that the licensed materials will be available before, or no later than the print equivalent, and/or will be kept current	logical	FR35	Present / Absent	RA	N	

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Terms Defined Entity Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Intellectual Property Warranty Indicator</i>	A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties	logical	FR35	Yes / No	RA	N	This clause, in the form of a warranty, may or may not include an indemnification of licensee
<i>Confidentiality Of User Information Indicator</i>	The requirement that user data should not be shared with third parties, reused or resold without permission	logical	FR35	Yes / No	RA	N	
<i>UCITA Override Clause Indicator</i>	A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state	logical	FR35	Yes / No	RA	N	UCITA is a state by state legislative proposal that would make click-through and shrink wrap licenses binding and enforceable. ARL libraries and consumers groups oppose the legislation. This may be irrelevant for institutions outside the United States, although possibly of interest when they license products from U.S. companies.
<i>Clickwrap Modification Clause Indicator</i>	A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement, or terms of use residing on the provider's server that might otherwise function as a contract of adhesion	logical	For staff display FR35	Yes / No	RA	N	
<i>Indemnification By Licensor Clause</i>	A clause by which the licensor agrees to indemnify the licensee against a legal claim	text	FR35	General / Intellectual property only / Other	RA	N	
<i>Indemnification By Licensee Clause Indicator</i>	A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee	logical	FR35	Yes / No	RA	N	
<i>Indemnification Clause Note</i>	Additional information providing amplification of any nuances to the indemnification clauses	text	FR35		O	N	
<i>Confidentiality Of Agreement</i>	Presence or absence of clauses that specify or detail restrictions on the sharing of the of terms of the license agreement	text	FR35	No / Financial only / All / All but user terms	RA	N	The clause may specify terms to be held confidential, or may refer to the entire agreement. This clause may be limited by state law for U.S. public institutions.
<i>Confidentiality Of Agreement Note</i>	Specific details of what aspects of the license are private	text	FR7.2, FR35		O	N	

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Terms Defined Entity Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Governing Law</i>	A clause specifying the governing law to be used in the event of an alleged breach of the agreement	text	FR35		RA	N	
<i>Governing Jurisdiction</i>	The venue or jurisdiction to be used in the event of an alleged breach of the agreement	text	FR35		RA	N	
<i>Applicable Copyright Law</i>	A clause that specifies the national copyright law that is agreed to in the contract	text	Default to country of institution FR35		RA	N	If contracting parties and governing law are U.S., assume U.S.; if not, specify. This default should be adjusted for the country of each local installation.
<i>Cure Period For Breach</i>	The cure period for an alleged material breach	numeric	Paired element with Cure Period For Breach Unit Of Measure FR34.1		RA	N	As measured by the Cure Period For Breach Unit Of Measure
<i>Cure Period For Breach Unit Of Measure</i>	The time interval that measures the Cure Period for Breach	text	Paired element with Cure Period For Breach FR34.1	Calendar day / Business day / Week	RA	N	
<i>Content Warranty</i>	A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the product is materially diminished	text			RA	N	The clause is usually in the form of a pro-rata refund or termination right
<i>Performance Warranty Indicator</i>	Indicates whether a clause that requires a satisfactory level of online availability and/or response time is present	logical	FR41.1	Yes / No	RA	N	
<i>Performance Warranty Uptime Guarantee</i>	The specific percentage of up-time guaranteed for the product being licensed, and the context for that percentage	text	FR41.1		RA	N	e.g., routine maintenance, excluding routine maintenance, etc.
<i>Maintenance Window</i>	The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable	text	Used to generate staff and user displays FR41.2		RA	N	
<i>Renewal Type</i>	A clause which specifies whether renewal is automatic or explicit	text	FR46.4	Automatic/ Explicit/ Perpetual	RA	N	

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Terms Defined Entity Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Non-Renewal Notice Period</i>	The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription	numeric	Paired element with Non-Renewal Notice Period Unit Of Measure FR46.2		RA	N	Use only if renewal type is automatic
<i>Non-Renewal Notice Period Unit Of Measure</i>	The time interval in which the Non-Renewal Notice Period is measured	text	Paired element with Non-Renewal Notice Period FR46.2		RA	N	

Terms Defined Entity Termination Obligations Group							
Definition:	Termination rights and obligations in the described agreement						
Elements	<i>Licensee Termination Right Indicator, Licensee Termination Condition, Licensee Notice Period For Termination, Licensee Notice Period For Termination Unit Of Measure, Licensor Termination Right Indicator, Licensor Termination Condition, Licensor Notice Period For Termination, Licensor Notice Period For Termination Unit Of Measure, Termination Right Note, Termination Requirements, Termination Requirements Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Licensee Termination Right Indicator</i>	The ability of the licensee to terminate an acquisition during a contract period	logical	FR47.1	Yes / No	RA	N	
<i>Licensee Termination Condition</i>	The conditions that would allow a licensee to terminate an acquisition during a contract period	text	FR47.1	At will / Breach by licensor / Other	RA	N	It should be possible to insert other values
<i>Licensee Notice Period For Termination</i>	The amount of advance notice required prior to contract termination by the licensee	numeric	Paired element with Licensee Notice Period For Termination Unit Of Measure FR47.1		RA	N	

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Terms Defined Entity Termination Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Licensee Notice Period For Termination Unit Of Measure</i>	The time interval in which the Licensee Notice Period for Termination is measured	text	Paired element with Licensee Notice Period For Termination FR47.1		RA	N	
<i>Licensor Termination Right Indicator</i>	The ability of a licensor to terminate an acquisition during a contract period	logical	FR47.2	Yes / No	RA	N	
<i>Licensor Termination Condition</i>	The conditions that would allow a licensor to terminate an acquisition during a contract period	text	FR47.2	At will / Breach by licensee / Other	RA	N	It should be possible to insert other values
<i>Licensor Notice Period For Termination</i>	The amount of advance notice required prior to contract termination by the licensor	numeric	Paired element with Licensor Notice Period For Termination Unit Of Measure FR47.2		RA	N	
<i>Licensor Notice Period For Termination Unit Of Measure</i>	The time interval in which the Licensor Notice Period for Termination is measured	text	Paired element with Licensor Notice Period For Termination FR47.2		RA	N	
<i>Termination Right Note</i>	Additional information necessary to amplify any specifications of termination rights	text			O	N	
<i>Termination Requirements</i>	The obligation to take certain actions upon termination of the contract	text	FR47.5		RA	N	Presence of text could be used to trigger action or notification if license is terminated or product is cancelled or withdrawn. e.g., requirement to destroy any copies of content.
<i>Termination Requirements Note</i>	A clarification of the termination requirements and what certification of the requirement activities is necessary	text	FR47.5		RA	N	

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Terms Defined Entity Notes Group							
Definition:	Additional information about the Electronic Product defined by this set of terms						
Elements	<i>Terms Note, Local Use Terms Fields</i>						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Terms Note</i>	Notes about the terms as a whole	text	FR7.2		O	N	
<i>Local Use Terms Fields</i>	Flexible and locally definable fields for controlling information related to terms	text	FR7.1, FR32.2, FR34.3		O	Y	

Prevailing Terms Entity							
Definition:	Defines what information from alternative terms of an acquisition business agreement or a license will prevail locally when applied to an Electronic Product						
Note	Note that the data structure includes both a Terms Defined entity as well as a Prevailing Terms entity. These two entities are very similar but have different functions: Terms Defined are the terms as defined by one license or by one business agreement. It may occur that among several Terms Defined instances that apply to a single Electronic Product, some of the individual terms are in conflict; therefore, it is necessary to determine which terms are in force for the product. The Prevailing Terms consist of pointers to the appropriate Terms Defined elements that actually apply to an Electronic Product. It should be functionally possible to enter a Terms Defined ID and specify that ALL of the Terms associated with that record prevail. FR6, FR35						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Terms ID</i>	The identification number assigned to each Prevailing Term record by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Prevailing Terms record to other data

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Prevailing Terms Entity Amount Group							
Definition:	Quoted cost information about the Electronic Product defined by this set of terms						
Elements	<i>Prevailing Amount, Prevailing Amount Note</i>						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Amount</i>	The contractually specified price for the Electronic Product	pointer	Paired element with Prevailing Amount Note	ID from Terms Defined entity	RA	Y	May not be equal to the sum paid as recorded in the price element. Repeating because it may be necessary to differentiate between one-time and ongoing quotes for the same product.
<i>Prevailing Amount Note</i>	Information relating to the amount quoted for the Electronic Product	pointer	Paired element with Prevailing Amount FR7.2	ID from Terms Defined entity	RA	Y	

Prevailing Terms Entity Authorized User Group							
Definition:	Authorized user information about the Electronic Product defined by this set of terms						
Elements	<i>Prevailing Authorized User Definition, Prevailing Local Authorized User Definition Indicator</i>						
Note	FR33						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Authorized User Definition</i>	The language in the contract that defines the group of users allowed to use the Electronic Product	pointer	FR33	ID from Terms Defined entity	RA	N	For academic libraries, the preferred definition is typically expressed in terms of students, faculty, and staff regardless of location, as well as on-site users of the libraries or other campus facilities. To be consulted by library staff when questions about the precise nature of the authorized user community arise. Inclusion of this may be desirable when authorized user definitions are nuanced or unusual.
<i>Prevailing Local Authorized User Definition Indicator</i>	The inclusion of an institution-specific preferred authorized user definition	pointer	FR33	ID from Terms Defined entity	RA	N	Used to flag license agreements for possible review should local requirements change (or to attempt to renegotiate local language where lacking)

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Prevailing Terms Entity Terms of Use Group							
Definition:	Terms of use information from the described agreement						
Elements	<i>Prevailing Fair Use Clause Indicator, Prevailing All Rights Reserved Indicator, Prevailing Database Protection Override Clause Indicator, Prevailing Citation Requirement Detail, Prevailing Digitally Copy, Prevailing Digitally Copy Term Note, Prevailing Print Copy, Prevailing Print Copy Term Note, Prevailing Scholarly Sharing, Prevailing Scholarly Sharing Term Note, Prevailing Distance Education, Prevailing Distance Education Term Note, Prevailing Interlibrary Loan Print Or Fax, Prevailing Interlibrary Loan Secure Electronic Transmission, Prevailing Interlibrary Loan Electronic, Prevailing Interlibrary Loan Record Keeping Required Indicator, Prevailing Interlibrary Loan Term Note, Prevailing Course Reserve Print, Prevailing Course Reserve Electronic / Cached Copy, Prevailing Course Reserve Term Note, Prevailing Electronic Link, Prevailing Electronic Link Term Note, Prevailing Course Pack Print, Prevailing Course Pack Electronic, Prevailing Course Pack Term Note, Prevailing Remote Access, Prevailing Walk-In User Term Note, Prevailing Local Use Permission Term Fields</i>						
Notes	FR6.2, FR32, FR35						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Fair Use Clause Indicator</i>	A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section 107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law	pointer	For staff display	ID from Terms Defined entity	RA	N	Fair use rights include, but are not limited to, printing, downloading, and copying. Most applicable for U.S. libraries but may be of interest for other countries when recording terms for products licensed by U.S. businesses.
<i>Prevailing All Rights Reserved Indicator</i>	A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor	pointer	For staff display	ID from Terms Defined entity	RA	N	
<i>Prevailing Database Protection Override Clause Indicator</i>	A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law	pointer	For staff display	ID from Terms Defined entity	RA	N	Most applicable for U.S. libraries but may be of interest for other countries when recording terms for products licensed by U.S. businesses
<i>Prevailing Citation Requirement Detail</i>	A specification of the required or recommended form of citation	pointer	FR6.2.3	ID from Terms Defined entity	RA	N	
<i>Prevailing Digitally Copy</i>	The right of the licensee and authorized users to download and digitally copy a portion of the licensed materials	pointer	May be used to generate staff and user displays	ID from Terms Defined entity	RA	N	
<i>Prevailing Digitally Copy Term Note</i>	Information which qualifies a permissions statement on Digitally Copy	pointer	FR7.2	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Print Copy</i>	The right of the licensee and authorized users to print a portion of the licensed materials	pointer	May be used to generate staff and user displays	ID from Terms Defined entity	RA	N	
<i>Prevailing Print Copy Term Note</i>	Information which qualifies a permissions statement on Print Copy	pointer	FR7.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Scholarly Sharing</i>	The right of authorized users and/or the licensee to transmit hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific or professional use	pointer	May be used to generate staff and user displays FR6.2.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Scholarly Sharing Term Note</i>	Information which qualifies a permissions statement on Scholarly Sharing	pointer	FR6.2.1, FR7.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Distance Education</i>	The right to use licensed materials in distance education	pointer	May be used to generate both staff and user displays FR6.2.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Distance Education Term Note</i>	Information which qualifies a permissions statement on Distance Education	pointer	FR6.2.1, FR7.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Interlibrary Loan Print Or Fax</i>	The right to provide the licensed materials via interlibrary loan by way of print copies or facsimile transmission	pointer	Used to generate staff displays	ID from Terms Defined entity	RA	N	
<i>Prevailing Interlibrary Loan Secure Electronic Transmission</i>	The right to provide the license materials via interlibrary loan by way of secure electronic transmission	pointer	Used to generate staff displays	ID from Terms Defined entity	RA	N	
<i>Prevailing Interlibrary Loan Electronic</i>	The right to provide the licensed materials via interlibrary loan by way of electronic copies	pointer	Used to generate staff displays	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Prevailing Interlibrary Loan Record Keeping Required Indicator	The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request	pointer	Used to generate staff displays	ID from Terms Defined entity	RA	N	
Prevailing Interlibrary Loan Term Note	Additional information related to interlibrary loan	pointer	Used to generate staff displays FR7.2	ID from Terms Defined entity	RA	N	
Prevailing Course Reserve Print	The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction	pointer	Used to generate staff displays FR6.2.1	ID from Terms Defined entity	RA	N	
Prevailing Course Reserve Electronic / Cached Copy	The right to make electronic copies of the licensed materials and store them on a secure network	pointer	Used to generate staff displays FR6.2.1	ID from Terms Defined entity	RA	N	e.g., book chapters, journal articles stored on a secure network, for course reserves and online course websites
Prevailing Course Reserve Term Note	Information which qualifies a permissions statement on Course Reserves	pointer	FR6.2.1, FR7.2	ID from Terms Defined entity	RA	N	
Prevailing Electronic Link	The right to link to the licensed material	pointer	Used to generate staff displays FR6.2.1	ID from Terms Defined entity	RA	N	
Prevailing Electronic Link Term Note	Information which qualifies a permissions statement on Electronic Links	pointer	FR6.2.1, FR7.2	ID from Terms Defined entity	RA	N	
Prevailing Course Pack Print	The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction	pointer	May be used to generate both staff and public displays FR6.2.1	ID from Terms Defined entity	RA	N	e.g., book chapters, journal articles
Prevailing Course Pack Electronic	The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction	pointer	May be used to generate both staff and public displays FR6.2.1	ID from Terms Defined entity	RA	N	e.g., book chapters, journal articles

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Prevailing Terms Entity Terms of Use Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Course Pack Term Note</i>	Information which qualifies a permissions statement on Course Packs	pointer	FR6.2.1, FR7.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Remote Access</i>	The right of an authorized user to gain access to an E-Product from an offsite location	pointer		ID from Terms Defined entity	RA	N	
<i>Prevailing Walk-In User Term Note</i>	Information which qualifies the status or permitted actions of Walk-In Users	pointer	FR6.1, FR7.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Local Use Permission Term Fields</i>	Flexible and locally definable fields for defining new permitted use terms	pointer	FR7.1, FR32.2	ID from Terms Defined entity	RA	Y	It should be possible for each of these fields associated to define actions such as public displays, reports, and alerts

Prevailing Terms Entity Restrictions Group							
Definition:	Restrictions information from the described agreement						
Elements	<i>Prevailing Concurrent User, Prevailing Pooled Concurrent Users, Prevailing Concurrent User Note, Prevailing Other User Restriction Note, Prevailing Other Use Restriction Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Concurrent User</i>	1. The licensed number of concurrent users for a resource. 2. The number of concurrent users if shared across an interface rather than for a specific resource.	pointer	May be used to generate staff displays FR38.4	ID from Terms Defined entity	RA	N	
<i>Prevailing Pooled Concurrent Users</i>	The number of concurrent users if shared across a consortium rather than within a specific institution	pointer	FR38.4	ID from Terms Defined entity	RA	N	
<i>Prevailing Concurrent User Note</i>	1. A specific explanation of how users are allocated or shared if pooled or platform-based. 2. Additional information about the number of concurrent users.	pointer	FR7.2, FR38.4	ID from Terms Defined entity	RA	N	
<i>Prevailing Other User Restriction Note</i>	Additional information about other user restrictions not adequately described elsewhere	pointer	FR7.2, FR33	ID from Terms Defined entity	RA	N	e.g., restrictions on users located outside of United States or relevant country of institution

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Prevailing Terms Entity Restrictions Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Other Use Restriction Note</i>	Additional information about other use restrictions not adequately described elsewhere	pointer	FR6.2.2, FR32	ID from Terms Defined entity	RA	N	e.g., time of day restrictions on Concurrent Users

Prevailing Terms Entity Perpetual Rights Group							
Definition:	Perpetual rights information from the described agreement						
Elements	<i>Prevailing Perpetual Access Right, Prevailing Perpetual Access Holdings, Prevailing Perpetual Access Note, Prevailing Archiving Right, Prevailing Archiving Format, Prevailing Archiving Note</i>						
Notes	FR47.7						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Perpetual Access Right</i>	The right to permanently access the licensed materials paid for during the period of the license agreement	pointer	For staff display FR37.1, FR47.7	ID from Terms Defined entity	RA	N	May be used to trigger action or notification if license is terminated or product is cancelled or withdrawn
<i>Prevailing Perpetual Access Holdings</i>	The dates of coverage for which perpetual rights are available and agreed upon in the legal contract	pointer	For staff display FR37.1, FR47.7	ID from Terms Defined entity	RA	N	
<i>Prevailing Perpetual Access Note</i>	Additional information related to perpetual access	pointer	For staff display FR7.2, FR37.1, FR47.7	ID from Terms Defined entity	RA	N	
<i>Prevailing Archiving Right</i>	The right to permanently retain an electronic copy of the licensed materials	pointer	FR37.1, FR47.7	ID from Terms Defined entity	RA	N	
<i>Prevailing Archiving Format</i>	The format of the archival content	pointer	FR37.1, FR47.7	ID from Terms Defined entity	RA	N	
<i>Prevailing Archiving Note</i>	Additional information related to archiving rights, product and format	pointer	FR7.2, FR37.1, FR47.7	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Obligations Group							
Definition:	General obligations described in the license or business agreement						
Elements	<i>Prevailing Accessibility Compliance Indicator, Prevailing Completeness Of Content Clause Indicator, Prevailing Concurrency With Print Version Clause Indicator, Prevailing Intellectual Property Warranty Indicator, Prevailing Confidentiality Of User Information Indicator, Prevailing UCITA Override Clause Indicator, Prevailing Clickwrap Modification Clause Indicator, Prevailing Indemnification By Licensor Clause, Prevailing Indemnification By Licensee Clause Indicator, Prevailing Indemnification Clause Note, Prevailing Confidentiality Of Agreement, Prevailing Confidentiality Of Agreement Note, Prevailing Governing Law, Prevailing Governing Jurisdiction, Prevailing Applicable Copyright Law, Prevailing Cure Period For Breach, Prevailing Cure Period For Breach Unit Of Measure, Prevailing Content Warranty, Prevailing Performance Warranty Indicator, Prevailing Performance Warranty Uptime Guarantee, Prevailing Maintenance Window, Prevailing Renewal Type, Prevailing Non-Renewal Notice Period, Prevailing Non-Renewal Notice Period Unit Of Measure</i>						
Notes	FR35						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Accessibility Compliance Indicator</i>	An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation	pointer	FR35	ID from Terms Defined entity	RA	N	For more information, see guidelines set forth by the World Wide Web Consortium at http://www.w3.org/wai
<i>Prevailing Completeness Of Content Clause Indicator</i>	The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the print equivalent	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Concurrency With Print Version Clause Indicator</i>	The presence of a provision in the contract which states that the licensed materials will be available before, or no later than the print equivalent, and/or will be kept current	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Intellectual Property Warranty Indicator</i>	A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties	pointer	FR35	ID from Terms Defined entity	RA	N	This clause, in the form of a warranty, may or may not include an indemnification of licensee
<i>Prevailing Confidentiality Of User Information Indicator</i>	The requirement that user data should not be shared with third parties, reused or resold without permission	pointer	FR35	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing UCITA Override Clause Indicator</i>	A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state	pointer	FR35	ID from Terms Defined entity	RA	N	UCITA is a state by state legislative proposal that would make click-through and shrink wrap licenses binding and enforceable. ARL libraries and consumers groups oppose the legislation. This may be irrelevant for institutions outside the United States, although possibly of interest when they license products from U.S. companies.
<i>Prevailing Clickwrap Modification Clause Indicator</i>	A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement, or terms of use residing on the provider's server that might otherwise function as a contract of adhesion	pointer	For staff display FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Indemnification By Licensor Clause</i>	A clause by which the licensor agrees to indemnify the licensee against a legal claim	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Indemnification By Licensee Clause Indicator</i>	A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Indemnification Clause Note</i>	Additional information providing amplification of any nuances to the indemnification clauses	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Confidentiality Of Agreement</i>	Presence or absence of clauses that specify or detail restrictions on the sharing of the of terms of the license agreement	pointer	FR35	ID from Terms Defined entity	RA	N	The clause may specify terms to be held confidential, or may refer to the entire agreement. This clause may be limited by state law for U.S. public institutions.
<i>Prevailing Confidentiality Of Agreement Note</i>	Specific details of what aspects of the license are private	pointer	FR7.2, FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Governing Law</i>	A clause specifying the governing law to be used in the event of an alleged breach of the agreement	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Governing Jurisdiction</i>	The venue or jurisdiction to be used in the event of an alleged breach of the agreement	pointer	FR35	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Applicable Copyright Law</i>	A clause that specifies the national copyright law that is agreed to in the contract	pointer	FR35	ID from Terms Defined entity	RA	N	
<i>Prevailing Cure Period For Breach</i>	The cure period for an alleged material breach	pointer	Paired element with Prevailing Cure Period For Breach Unit Of Measure FR34.1	ID from Terms Defined entity	RA	N	As measured by the Prevailing Cure Period For Breach Unit Of Measure
<i>Prevailing Cure Period For Breach Unit Of Measure</i>	The time interval that measures the Cure Period for Breach	pointer	Paired element with Prevailing Cure Period For Breach FR34.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Content Warranty</i>	A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the product is materially diminished	pointer		ID from Terms Defined entity	RA	N	The clause is usually in the form of a pro-rata refund or termination right
<i>Prevailing Performance Warranty Indicator</i>	Indicates whether a clause that requires a satisfactory level of online availability and/or response time is present	pointer	FR41.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Performance Warranty Uptime Guarantee</i>	The specific percentage of up-time guaranteed for the product being licensed, and the context for that percentage	pointer	FR41.1	ID from Terms Defined entity	RA	N	e.g., routine maintenance, excluding routine maintenance, etc.
<i>Prevailing Maintenance Window</i>	The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable	pointer	Used to generate staff and user displays FR41.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Renewal Type</i>	A clause which specifies whether renewal is automatic or explicit	pointer	FR46.4	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Non-Renewal Notice Period</i>	The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription	pointer	Paired element with Prevailing Non-Renewal Notice Period Unit Of Measure FR46.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Non-Renewal Notice Period Unit Of Measure</i>	The time interval in which the Non-Renewal Notice Period is measured	text	Paired element with Prevailing Non-Renewal Notice Period FR46.2	ID from Terms Defined entity	RA	N	

Prevailing Terms Entity Termination Obligations Group							
Definition:	Termination rights and obligations in the described agreement						
Elements	<i>Prevailing Licensee Termination Right Indicator, Prevailing Licensee Termination Condition, Prevailing Licensee Notice Period For Termination, Prevailing Licensee Notice Period For Termination Unit Of Measure, Prevailing Licensor Termination Right Indicator, Prevailing Licensor Termination Condition, Prevailing Licensor Notice Period For Termination, Prevailing Licensor Notice Period For Termination Unit Of Measure, Prevailing Termination Right Note, Prevailing Termination Requirements, Prevailing Termination Requirements Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Licensee Termination Right Indicator</i>	The ability of the licensee to terminate an acquisition during a contract period	pointer	FR47.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Licensee Termination Condition</i>	The conditions that would allow a licensee to terminate an acquisition during a contract period	pointer	FR47.1	ID from Terms Defined entity	RA	N	

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Prevailing Terms Entity Termination Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Prevailing Licensee Notice Period For Termination</i>	The amount of advance notice required prior to contract termination by the licensee	pointer	Paired element with Prevailing Licensee Notice Period For Termination Unit Of Measure FR47.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Licensee Notice Period For Termination Unit Of Measure</i>	The time interval in which the Licensee Notice Period for Termination is measured	pointer	Paired element with Prevailing Licensee Notice Period For Termination FR47.1	ID from Terms Defined entity	RA	N	
<i>Prevailing Licensor Termination Right Indicator</i>	The ability of a licensor to terminate an acquisition during a contract period	pointer	FR47.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Licensor Termination Condition</i>	The conditions that would allow a licensor to terminate an acquisition during a contract period	pointer	FR47.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Licensor Notice Period For Termination</i>	The amount of advance notice required prior to contract termination by the licensor	pointer	Paired element with Prevailing Licensor Notice Period For Termination Unit Of Measure FR47.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Licensor Notice Period For Termination Unit Of Measure</i>	The time interval in which the Licensor Notice Period for Termination is measured	pointer	Paired element with Prevailing Licensor Notice Period For Termination FR47.2	ID from Terms Defined entity	RA	N	
<i>Prevailing Termination Right Note</i>	Additional information necessary to amplify any specifications of termination rights	pointer			RA	N	

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Prevailing Terms Entity Termination Obligations Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Prevailing Termination Requirements	The obligation to take certain actions upon termination of the contract	pointer	FR47.5	ID from Terms Defined entity	RA	N	Presence of text could be used to trigger action or notification if license is terminated or product is cancelled or withdrawn. e.g., requirement to destroy any copies of content.
Prevailing Termination Requirements Note	A clarification of the termination requirements and what certification of the requirement activities is necessary	pointer	FR47.5	ID from Terms Defined entity	RA	N	

Prevailing Terms Entity Notes Group							
Definition:	Used to record additional information about the E-Product defined by this set of terms or the choices of Prevailing Terms made amongst conflicting Terms Defined						
Elements	<i>Prevailing Terms Note, Prevailing Local Use Terms Fields</i>						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Prevailing Terms Note	Notes about the prevailing terms as a whole or any explanations about choices made to set prevailing terms	text	FR7.2		O	N	
Prevailing Local Use Terms Fields	Flexible and locally definable fields for controlling information related to terms	pointer	FR7.1, FR32.2, FR34.3	ID from Terms Defined entity	RA	Y	

User Group Entity							
Definition:	Lists categories of persons who, by virtue of an affiliation or some other attribute, may be permitted by contract to access the product						
Elements	<i>User Group ID, User Status, User Proxy Information, User Note</i>						
Note	May be used to inter-operate with a local or vendor-based access management system or proxy server (e.g. by mapping to appropriate authentication credentials) FR6.1, FR7.3, FR15.1, FR18, FR33						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
User Group ID	The identification number assigned to each User Group record by the electronic resource management system	unique ID	system generated identifier		R	N	Links a User Group record to other data

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User Group Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>User Status</i>	The specific user group categories for the institution	text	FR7.3	Pre-populated options listed in Appendix B	R	N	Values not present in Appendix B can be created to identify user status of additional user categories
<i>User Proxy Information</i>	The URI prefix used to direct access through a proxy server for this user group or other information needed to establish proxy connections for the group	text	FR14.3		O	N	To be used when a proxy setup permits distinguishing accessibility permissions on the basis of user groups and when the license specifies that this particular user group is permitted or prohibited. Otherwise, general library proxy information should be recorded in the Library entity.
<i>User Note</i>	Additional information about user categories or special restrictions not covered elsewhere	text	FR7.2		O	N	

Available To User Bridge Entity							
Definition:	Concatenates information from Prevailing Terms entity and User Group entity. Identifies on a case-by-case basis whether a designated user group is permitted access to the product or products governed by the associated terms.						
Elements	<i>Available To User ID, Terms Record Associated With User Group, User Group Associated With Term, User Group Permission Legal Interpretation, User Group Permission Operational Value</i>						
Notes	FR6.1, FR18						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Available To User ID</i>	The identification number assigned to the Available To User Bridge by the electronic resource management system	unique ID	system generated identifier		R	N	
<i>Terms Record Associated With User Group</i>	The Prevailing Terms record for which the user group permissions are defined	pointer		ID from the Prevailing Terms entity	R	N	

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Available To User Bridge Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>User Group Associated With Term</i>	Identifies the user group which, by virtue of an affiliation or some other attribute, is permitted or prohibited by contract to access the product	pointer	May be used to interoperate with a local or vendor-based access management system (e.g. by mapping to appropriate authentication credentials)	ID from the User Group entity	RA	N	
<i>User Group Permission Legal Interpretation</i>	Designates whether the license or business agreement defining these terms permits or prohibits the user group's access to the product	text	Used for public and staff displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	R	N	Used to define those who the license permits or restricts
<i>User Group Permission Operational Value</i>	Designates a local decision to further constrain access beyond that required by the license or business agreement	text	Defaults to User Group Permission Legal Interpretation, but can be overridden	Permitted / Prohibited	RA	N	e.g., a choice to constrain access to the faculty of a particular department to reduce lockouts. If present, this over-rides User Group Permission Legal Interpretation for public displays.

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Location Entity							
Definition:	Lists those locations that may be permitted by contract to access the product						
Elements	<i>Location ID, Location Name, Location IP Subset, Location Proxy Information, Location Note</i>						
Types							
Note	May be used to interoperate with a local or vendor-based access management system (e.g. by mapping to appropriate IP addresses). In a consortium, the individual libraries participating in the contract could be recorded here for actual authentication management in addition to their record in the Participating Library entity. FR6.1, FR7.3, FR18						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Location ID</i>	The identification number assigned to each Location record by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Location record to other data
<i>Location Name</i>	The name of a specific location category for the local institution	text	May be used to interoperate with a local or vendor-based access management system (e.g. by mapping to appropriate IP addresses)		R	Y	e.g., organizational units, buildings, campuses, etc.
<i>Location IP Subset</i>	The set of IP addresses associated with a specific location	text	FR16.1		RA	N	
<i>Location Proxy Information</i>	The URI prefix used to direct access through a proxy server for this location or other information needed to establish proxy connections for the location	text			O	N	To be used when a proxy setup permits distinguishing accessibility permissions on the basis of locations and when the license specifies that this particular location is permitted or prohibited. Otherwise, general library proxy information should be recorded in the Library entity.
<i>Location Note</i>	Additional information pertaining to this location	text	FR7.2		O	N	

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Available To Location Bridge Entity							
Definition:	Concatenates information from Terms entity and Location entity. Identifies on a case-by-case basis whether a designated location is permitted access to the product or products governed by the associated terms.						
Elements	<i>Available To Location ID, Terms Available To Location, Location Assigned To Term, Location Permission Legal Interpretation, Location Permission Operational Value</i>						
Notes	In a consortium, the individual libraries participating in the contract could be recorded here. FR6.1, FR18						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Available To Location ID</i>	The identification number assigned to the Available To Location Bridge by the electronic resource management system	unique ID	system generated identifier		R	N	
<i>Terms Available To Location</i>	The Prevailing Terms record for which the location permissions are defined	pointer		ID from the Prevailing Terms entity	R	N	
<i>Location Assigned To Term</i>	Lists the location which is permitted or prohibited by contract to access the product	pointer	May be used to interoperate with a local or vendor-based access management system (e.g. by mapping to appropriate IP addresses)	ID from the Location entity	RA	N	In a consortium, this might be the individual libraries participating in the contract
<i>Location Permission Legal Interpretation</i>	Designates whether the license or business agreement defining these terms permits or prohibits access from the location in question	text	Used for public and staff displays	Permitted (explicit) / Permitted (interpreted) / Prohibited (explicit) / Prohibited (interpreted) / Silent (uninterpreted) / Not Applicable	R	N	Used to define those locations the license permits or restricts. In a consortium, this might be the individual libraries participating in the contract.

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Available To Location Bridge Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Location Permission Operational Value	Designates a local decision to further constrain access beyond that required by the license or business agreement	text	Defaults to Location Permission Legal Interpretation, but can be overridden. May be used to interoperate with a local or vendor-based access management system (e.g. by mapping to appropriate IP addresses.)	Permitted / Prohibited	RA	N	e.g., restricting to an IP subset for a part of a building when the whole building is permitted, because the IP set for the entire building would also include non-licensed locations. In a consortium, this might be the individual libraries participating in the contract. If present, this over-rides Location Permission Legal Interpretation for public displays.

Access Information Entity							
Definition:	Information about access points and access requirements needed to make an Electronic Product available						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Access Information ID	The identification number assigned to the Access Information record by the electronic resource management system	unique ID	system generated identifier		R	N	Links an Access Information record to other data

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Access Information Entity Identifier Group							
Definition:	Identifier information from access data associated with a particular Electronic Product						
Elements	<i>Primary Access Uniform Resource Identifier, Primary Access Uniform Resource Identifier Type, Alternate Uniform Resource Identifier, Alternate Uniform Resource Identifier Type, Local Persistent Uniform Resource Identifier, Local Persistent Uniform Resource Identifier Type</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Primary Access Uniform Resource Identifier</i>	The method of access, the location, and the file name of an Electronic Product	text	Hypertext link functionality. Paired element with Primary Uniform Resource Identifier Type FR14.1, FR14.4	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	RA	N	Usually the URL, which is a subset of the URI. A local choice for use of this element might be to use it for a local persistent identifier. In which case, there is no need to repeat information in the local persistent identifier element.
<i>Primary Access Uniform Resource Identifier Type</i>	The type of URI being used to locate and identify the product	text	Paired element with Primary Uniform Resource Identifier FR14.1, FR14.4	URL / URN, etc.	O	N	
<i>Alternate Uniform Resource Identifier</i>	An alternate URI available for access to an identical or alternate version of the product	text	Hypertext link functionality. Paired element with Alternate Uniform Resource Identifier Type FR14.1, FR14.4	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	O	Y	This may be set up to be actionable in specific events. Examples include URLs for mirror sites, URLs that provide access to a resource via a different provider, etc.
<i>Alternate Uniform Resource Identifier Type</i>	The type of alternate URI being used	text	Paired element with Alternate Uniform Resource Identifier FR14.1, FR14.4	URL, URN, etc.	O	Y	

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Access Information Entity Identifier Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Local Persistent Uniform Resource Identifier</i>	A persistent URI that is created locally to access the product	text	Hypertext link functionality Paired element with Local Persistent Uniform Resource Identifier Type FR14.1, FR14.2, FR14.4	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	O	Y	
<i>Local Persistent Uniform Resource Identifier Type</i>	The type of locally created URI	text	Paired element with Local Persistent Uniform Resource Identifier FR14.1, FR14.2, FR14.4	URL, URN, etc.	O	Y	

Access Information Entity Authentication Group							
Definition:	Authentication information from access data associated with a particular Electronic Product						
Elements	<i>Implemented Authorization Method, Alternate Authorization Method, Electronic Product User Identifier, Electronic Product User Password, Electronic Product Local User Identifier, Electronic Product User Password Note, IP Address Registration Method, IP Address Registration Instruction, IP Addresses Registered For Access, Date IP Addresses Registered, IP Address General Note, Access Information Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Implemented Authorization Method</i>	The method by which access to the product is controlled	text	FR14.3	IP address / Password / IP address + Password / Script / Certificate / Unrestricted / Other	R	Y	If the provider supports more than one access method, this element records the method(s) selected for use by the subscribing institution

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Access Information Entity Authentication Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Alternate Authorization Method</i>	Additional authorization methods available for the product	text	FR14.3	IP address / Password / IP address + Password / Script / Certificate / Unrestricted / Other	O	Y	Alternate authorization means available but not in use at local institution
<i>Electronic Product User Identifier</i>	The user identifier that provides access to the product	text	Grouped element with Electronic Product User Password and Electronic Product Local User Identifier FR17		RA	Y	May be independent of primary access method selected for use (as when both IP and User ID-based methods are available)
<i>Electronic Product User Password</i>	The password that provides access to the product	text	Grouped element with Electronic Product User Identifier and Electronic Product Local User Identifier FR17		RA	Y	May be independent of primary access method selected for use (as when both IP and User ID-based methods are available)
<i>Electronic Product Local User Identifier</i>	An identifier associated with a local institution identity file	text	Grouped element with Electronic Product User Identifier and Electronic Product User Password. Linked to institution identity file FR16, FR17		O	Y	e.g., for distribution to end-users and/or for remote access purposes, or other relevant information

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Access Information Entity Authentication Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Product User Password Note</i>	Additional information about user identifiers and passwords	text	FR7.2, FR17		O	N	Can be used to record additional user identifiers and/or passwords available for access to the product (e.g. for distribution to end-users and/or for remote access purposes)
<i>IP Address Registration Method</i>	The method by which IP addresses are sent to the product provider	text	FR16.2	Online / Send to provider	RA	N	
<i>IP Address Registration Instruction</i>	The URI at which IP addresses are registered, the email address or contact role to which updates are sent, or other relevant instructions	text	FR16.2		O	N	
<i>IP Addresses Registered For Access</i>	IP addresses registered for use with the product	text	Text or link to external source FR16.1		RA	N	If a location subset IP address is used, this might simply be a pointer to an Available To Location ID. May contain a list of registered IP addresses, or link to an external file or database where such addresses are maintained. Usage note: a method for automatic update and provider notification when IP addresses are updated may be desirable.
<i>Date IP Addresses Registered</i>	The most recent date on which IP addresses were registered with the product provider	date	This field should be updated automatically if the system supports automatic sending of IP addresses FR16.3		RA	N	
<i>IP Address General Note</i>	Additional notes pertaining to IP address information	text	FR7.2, FR16		O	N	
<i>Access Information Note</i>	Additional information pertaining to access issues and unusual situations	text	FR9, FR16		O	N	e.g., inaccessible or nonsubscribed portions not marked as such at the site, unusual login/logoff requirements, local vs. remote authentication control, or navigation or accessibility features

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Access Information Entity Proxy Group							
Definition:	Information necessary to enable proxy access to a particular Electronic Product						
Elements	<i>Proxy Server Decision Indicator, Proxy Registration Status, Domain Name</i>						
Notes	Those institutions without proxies, or whose proxies do not require any setup for individual resources, would set the Decision Indicator to default to “Yes” and the Status to default to “Not applicable”						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Proxy Server Decision Indicator</i>	The decision to make the product available through a server that operates as an intermediary between the user’s computer and the product to ensure proper authorization	logical	FR15	Yes / No	R	N	The purpose of this element is not to convey license information (e.g. whether proxy servers are permitted) but to facilitate interoperation with local access management systems
<i>Proxy Registration Status</i>	The status of registration of access information with the relevant proxy server	text	FR15	To be registered / Registration in process / Registered / Not applicable	RA	N	
<i>Domain Name</i>	Any domain names associated with a given product	text	FR15		O	Y	Some proxy servers require this information

Access Information Entity Z39.50 Group							
Definition:	Information about Z39.50 access data associated with a particular Electronic Product						
Elements	<i>Z39.50 Address, Z39.50 Port, Z39.50 Attributes, URI To Z39.50 Information, Z39.50 Database Name Long, Z39.50 Database Name Short, Z39.50 Authentication Information</i>						
Notes	This group probably needs more detail. The authors also recognize that access protocols other than Z39.50 exist and might need similar elements available for information records.						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Z39.50 Address</i>	Address used to provide Z39.50 access	text	FR38.3		O	N	
<i>Z39.50 Port</i>	Port used to provide Z39.50 access	numeric	FR38.3		O	N	
<i>Z39.50 Attributes</i>	Attributes necessary to activate Z39.50 access	text	FR38.3		O	N	
<i>URI To Z39.50 Information</i>	Information to assist Z39.50 access via a web interaction	text	FR38.3		O	N	
<i>Z39.50 Database Name Long</i>	Long database name necessary to enable Z39.50 access	text	FR38.3		O	N	

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Access Information Entity Z39.50 Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Z39.50 Database Name Short</i>	Short database name necessary to enable Z39.50 access	text	FR38.3		O	N	
<i>Z39.50 Authentication Information</i>	Authentication information necessary to activate Z39.50 access	text	FR38.3		O	N	

Administrative Information Entity							
Definition:	Information used to manage the life cycle of the Electronic Product						
Note							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Administrative Information ID</i>	The identification number assigned to the Administrative Information record by the electronic resource management system	unique ID	system generated identifier		R	N	Links an Administrative Information record to other data

Administrative Information Entity Identifier Group							
Definition:	Identifier information from administrative data associated with a particular Electronic Product						
Elements	<i>Administrative Uniform Resource Identifier, Administrative Uniform Resource Identifier Type, Administrative Identifier, Administrative Password, Administrative Password Note</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Administrative Uniform Resource Identifier</i>	The URI of the online administration module	text	Hypertext link functionality. Paired element with Administrative Uniform Resource Identifier Type FR38.1	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	RA	N	

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Administrative Information Entity Identifier Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Administrative Uniform Resource Identifier Type</i>	The type of URI that is used for the online administration module	text	Paired element with Administrative Uniform Resource Identifier FR38.1	URL, URN, etc	O	N	
<i>Administrative Identifier</i>	The identifier used to access the online administration module	text	Grouped element with Administrative Password and Administrative Password Note FR38.1		RA	Y	Used if different from account ID
<i>Administrative Password</i>	The password used to access the online administration module	text	Grouped element with Administrative Identifier and Administrative Password Note FR38.1		RA	Y	
<i>Administrative Password Note</i>	Any clarification needed to identify an administrative password or to whom it is assigned	text	Grouped element with Administrative Identifier and Administrative Password FR7.2, FR38.1		O	Y	

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Administrative Information Entity Configuration Group							
Definition:	Describes which features of a product are configurable either online or by the provider, and their values where applicable						
Elements	<i>Configurable Session Timeout Indicator, Session Timeout Value, Logout Uniform Resource Identifier Indicator, Logout Uniform Resource Identifier Value, Logout Uniform Resource Identifier Type, User Interface Configuration Indicator, Subscriber Branding Indicator, Subscriber Branding Activation Status Indicator, Subscriber Branding Note, Personalization Services Indicator, Z39.50 Indicator, Hook To Holdings Indicator, Holdings Link Activated Indicator, Provider Reference Linking Indicator, Inbound Linking Indicator, Inbound Linking Activation Status Indicator, OpenURL Compliance Indicator, OpenURL Activation Status Indicator, Linking Note, MARC Record Availability Indicator, MARC Record Note, Interface Languages Availability Indicator, Interface Language Implemented, Local Use Administrative Fields</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Configurable Session Timeout Indicator</i>	The availability of a configurable inactivity timeout	logical	FR38.3	Yes / No	O	N	
<i>Session Timeout Value</i>	The inactivity timeout used for the product	numeric	FR38.3		RA	N	The timeout period can be fixed or configurable
<i>Logout Uniform Resource Identifier Indicator</i>	Indicates whether the product supports a locally specified URI to which the user is directed upon exiting the Electronic Product	logical	FR38.3	Yes / No	O	N	
<i>Logout Uniform Resource Identifier Value</i>	The locally specified URI to which the user is directed upon exiting the Electronic Product	text	Paired element with Logout Uniform Resource Identifier Type FR38.3		RA	N	
<i>Logout Uniform Resource Identifier Type</i>	The type of Logout URI being used	text	Paired element with Logout Uniform Resource Identifier Value FR38.3	URL, URN, etc	O	N	
<i>User Interface Configuration Indicator</i>	The ability to control user interface features	logical	FR38.3	Yes / No	O	N	
<i>Subscriber Branding Indicator</i>	The availability of a branding feature	logical	FR38.3	Yes / No	O	N	Used to highlight the local institution's role in making the product available to its user community

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Administrative Information Entity Configuration Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Subscriber Branding Activation Status Indicator</i>	The activation of a branding feature	logical	FR38.3	Yes/No	RA	N	
<i>Subscriber Branding Note</i>	Additional information about subscriber branding	text	FR38.3		O	N	
<i>Personalization Services Indicator</i>	The availability of personalized features	logical	FR38.3	Yes / No	O	N	e.g. an alerting service, etc.
<i>Z39.50 Indicator</i>	Indicates whether the Z39.50 computer-to-computer communication protocol is supported by the interface	logical	FR38.3	Yes / No	O	N	ANSI Standard
<i>Hook to Holdings Indicator</i>	The availability of a link to library holdings	logical	FR38.3	Yes / No	O	N	
<i>Holdings Link Activated Indicator</i>	The activation of a link to library holdings	logical	FR38.3	Yes / No	RA	N	
<i>Provider Reference Linking Indicator</i>	The availability of links to external content created by the provider of the product	logical	FR38.3	Yes / No	O	N	
<i>Inbound Linking Indicator</i>	The availability of a link to internal stable locations within a product	logical	FR38.3	Yes / No	O	N	Often used for individual journals or books, links can be based on some standard algorithm
<i>Inbound Linking Activation Status Indicator</i>	The activation of a link to internal stable locations within a product	logical	FR38.3	Yes / No	RA	N	
<i>OpenURL Compliance Indicator</i>	Indicates whether the Electronic Product and its content is generating OpenURL Standard compliant metadata	logical	FR38.3	Yes / No	O	N	For more information on OpenURL, see http://www.niso.org/committees/committee_ax.html
<i>OpenURL Activation Status Indicator</i>	The activation of external links from this product	logical	FR38.3	Yes/No	RA	N	
<i>Linking Note</i>	Additional information about linking	text	FR7.2, FR38.3		O	N	e.g., implementation details or other notes
<i>MARC Record Availability Indicator</i>	The availability of MARC records for the resource	logical	FR38.5	Yes / No	O	N	
<i>MARC Record Note</i>	Further information regarding the availability of MARC record sets	text	FR7.2, FR38.5		O	N	e.g., free or purchased, acquisition and implementation status, etc.
<i>Interface Languages Availability Indicator</i>	The availability of multiple languages for the Interface	logical	FR38.3	Yes / No	O	N	

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Administrative Information Entity Configuration Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Interface Language Implemented</i>	The activation of one or more interface languages	text	FR38.3	Code values from ISO 639-2 (three-letter language code)	RA	Y	Examples include "eng" for English, "akk" for Akkadian. Derive from print version if print version exists (or point at). May use another standard for language code values (e.g. RFC3066) at the preference of the system designer as long as translation routines are available.
<i>Local Use Administrative Fields</i>	Flexible and locally definable fields for defining new configuration options	text	FR7.1, FR38.3		O	Y	

Administrative Information Entity Usage Statistics Group							
Definition:	Used to record information about usage statistics for the Electronic Product						
Elements	<i>Usage Statistics Availability Indicator, Statistics Standard Compliance, Usage Statistics Delivery Method, Usage Statistics Format, Usage Statistics Frequency, Usage Statistics Online Location, Usage Statistics User Identifier, Usage Statistics Password, Usage Statistics Addressee, Usage Statistics Note, Usage Statistics Locally Stored</i>						
Notes	Most of these elements are relevant for vendor provided statistics on the assumption that locally produced statistics will be housed and managed in a separate system and the ERMS will simply need linkages to that system. FR40						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Usage Statistics Availability Indicator</i>	The availability of usage statistics for the product	logical	FR40.1	Yes/No	O	N	
<i>Statistics Standard Compliance</i>	The official standard to which the statistics conform	text	FR40.1	COUNTER version # / ICOLC 1998*	O	N	For more information, see guidelines set forth at http://www.projectcounter.org and http://www.library.yale.edu/consortia/2001webst ats.htm
<i>Usage Statistics Delivery Method</i>	The manner in which statistics are made available	text	FR40.1	Online / Email / Paper	RA	N	
<i>Usage Statistics Format</i>	The format(s) in which statistics are made available	text	(Multiple values permitted) FR40.1	HTML / Delimited / Excel / PDF / CSV / ASCII / Other	RA	Y	

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Administrative Information Entity Usage Statistics Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Usage Statistics Frequency</i>	The frequency with which statistics are made available	text	FR40.1, FR40.7	Monthly / Quarterly / Bi-Annual / User-selectable	RA	N	
<i>Usage Statistics Online Location</i>	The online location at which statistics can be accessed	text	FR40.2		RA	N	e.g., URL or file path
<i>Usage Statistics User Identifier</i>	The identifier used for online access to the statistics management site or dataset	text	FR40.2	None / Same as Admin ID / Other (free text)	RA	N	May be same as administrative identifier
<i>Usage Statistics Password</i>	The password used for online access to the statistics management site or dataset	text	FR40.2	None / Same as Admin / Other (free text)	RA	N	May be same as administrative password
<i>Usage Statistics Addressee</i>	The local person to whom statistics are sent	pointer	FR26, FR40.1	ID from Contact entity.	RA	N	
<i>Usage Statistics Note</i>	Additional information regarding usage statistics	text	FR40.6		O	N	e.g. missing time periods
<i>Usage Statistics Locally Stored</i>	Information about and/or links to locally-stored data	text	FR40.3		O	N	

Administrative Information Entity Support Group							
Definition:	Information necessary to support use of the Electronic Product						
Elements	<i>Hardware Requirement, Software Requirement, Maintenance Window Value, Provider System Status Uniform Resource Indicator, Provider System Status Uniform Resource Indicator Type, Product Unavailable Indicator, Product Advisory Note, Local Performance Monitoring Note, Incident Log, Training Information, Administrative Documentation, User Documentation</i>						
Notes	FR39, FR41						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Hardware Requirement</i>	Information about hardware requirements	text	FR9, FR41.5		RA	N	
<i>Software Requirement</i>	Information about software requirements	text	FR9, FR41.5		RA	N	e.g., browser versions, plug-ins, fonts, or special client software
<i>Maintenance Window Value</i>	The provider's regularly-scheduled downtime window for this product	text	FR11, FR41.2		RA	N	

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Administrative Information Entity Support Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Provider System Status Uniform Resource Indicator</i>	The URI at which the provider posts system status information	text	Hypertext link functionality. Paired element with Provider System Status Uniform Resource Indicator Type FR41.4	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	RA	N	
<i>Provider System Status Uniform Resource Indicator Type</i>	The type of URI used to post system status information	text	Paired element with Provider System Status Uniform Resource Indicator FR41.4	URL, URN, etc	O	N	
<i>Product Unavailable Indicator</i>	A flag that indicates that a product is not available	logical	For public display FR10, FR41.6	Available / Unavailable	O	N	May trigger a particular action
<i>Product Advisory Note</i>	A note for public display of temporary information about a product	text	May be used for public display FR7.2, FR10, FR11, FR41.6		RA	N	Used to describe a problem with a product, provide advance notice of anticipated downtime, or convey other temporary information
<i>Local Performance Monitoring Note</i>	Information concerning web sites or programs that carry out local performance monitoring	text	FR41.3		O	N	
<i>Incident Log</i>	A log of downtime and problem reports and their resolution	text	FR41.7, FR42.4		O	N	An external call tracking system may be used instead
<i>Training Information</i>	Information regarding the availability of special training	text	FR39.1, FR39.3		O	N	e.g., instructions on how to bypass simultaneous user restrictions. May also include training contact names and other general information.
<i>Administrative Documentation</i>	Information about and/or location of documentation available for product administrators	text	FR39.2		O	N	
<i>User Documentation</i>	Information about and/or location of documentation available for end users	text	FR39.2		O	N	Value might be a URI pointing to training documentation or interactive tutorials

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Processing Workflow Entity							
Definition:	The status of various aspects of the lifecycle of an Electronic Product						
Note	This entity is intended as a sample model for a local workflow process but should be highly customizable to closely adhere to each institution's functional needs						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Process ID</i>	The identification number assigned to the Processing Workflow record by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Processing Workflow record to other data

Processing Workflow Entity Identifier Group							
Definition:	Used to identify which Electronic Product is being controlled						
Elements	<i>Interface In Process, Electronic Resource In Process</i>						
Notes							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Interface In Process</i>	The Interface for which the workflow is being controlled	pointer		ID from Interface entity	RA	N	Use either an Electronic Resource ID or an Interface ID but not both in one record
<i>Electronic Resource In Process</i>	The Electronic Resource for which the workflow is being controlled	pointer		ID from E-Resource entity	RA	N	Use either an Electronic Resource ID or an Interface ID but not both in one record

Processing Workflow Entity Pre-Selection Group							
Definition:	Information necessary to manage the pre-selection process for an Electronic Product						
Elements	<i>Electronic Product Pre-Selection Expected Decision Date, Electronic Product Pre-Selection Cost Information, Electronic Product Evaluation History, Electronic Product Pre-Selection Note</i>						
Notes	Status for products in pre-selection can be found in the appropriate Electronic Resource or Interface Status elements in the Electronic Resource or Interface entities. FR23						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Product Pre-Selection Expected Decision Date</i>	The date by which a decision to acquire the Electronic Product is to be made	date	FR29		R	N	A tickler for reminding staff about necessary decisions

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Processing Workflow Entity Pre-Selection Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Electronic Product Pre-Selection Cost Information	Pricing information for staff review	text	FR23		RA	N	May record several different pricing models from which an institution must choose
Electronic Product Evaluation History	Information regarding evaluations of the product made during the pre-selection process	text	May be a link to an outside record FR23		O	N	
Electronic Product Pre-Selection Note	Additional information pertaining to pre-selection actions and decisions	text	FR23		O	N	

Processing Workflow Entity In-Process Group							
Definition:	Information necessary to manage the in-process part of an Electronic Product's lifecycle						
Elements	<i>Order Request Date, Order Request Note, Authentication Status, Z39.50 Access Status, Cataloging Request Date, Cataloging Priority, Access Confirmation Indicator, Access Tested Date, Local Services Status, Interface Customization Status, Publicity Status, Instructional Tools Status, Public Display Release Status, Usage Data Setup Status, In Process Note</i>						
Notes	FR30						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Order Request Date	The date upon which a request is made for the production of a purchase order for the resource	date			O	N	Set by the system in response to system application functionality. This is included because we are expecting this to be a connection between two staff workflow units.
Order Request Note	Additional information about the request for order creation for an Electronic Product	text		Pending / Problem hold / Done	O	N	Could be used to clarify why an order has not yet been requested
Authentication Status	An indication that provided methods of authentication have been identified and accommodated	text		Pending / Other (free text)	O	N	e.g., if passwords have been posted internally, supplied to service points, etc.
Z39.50 Access Status	The status of setting up Z39.50 Access to the product	text	FR38.3.1	Pending / Done	O	N	

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Processing Workflow Entity In-Process Group (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Cataloging Request Date</i>	The date when a request to catalog the product was made	date	FR38.5		O	N	Set by the system in response to system application functionality. This is included because we are expecting this to be a connection between two staff workflow units.
<i>Cataloging Priority</i>	The level of priority that the product should be assigned in the cataloging workflow	text	FR38.5	Low / Normal / Rush	O	N	
<i>Access Confirmation Indicator</i>	An indication that access to the product was functional when tested	logical	FR14	Yes / No	O	N	
<i>Access Tested Date</i>	The date on which access to the product was tested	date	FR14		O	N	
<i>Local Services Status</i>	The status of setting up access to the product in other local services	text	FR38.3	Not requested / Pending / Done	O	Y	e.g., OpenURL resolver, broadcast search, etc. Local institutions may want to specify statuses on these individually.
<i>Interface Customization Status</i>	The status of customizing the interface for the product	text	FR38.3	Pending / Done / Not applicable	O	N	Many products do not offer the capability to customize the interface
<i>Publicity Status</i>	The status of preparing publicity for the product	text	FR39	Pending / Done / Not applicable	O	N	
<i>Instructional Tools Status</i>	The status of instructional tools for the product	text	FR39	Pending / Done / Not applicable	O	N	
<i>Public Display Release Status</i>	The status of releasing the product to public display	text		Pending / Done / Not applicable	O	N	Used to indicate the status of having a resource show up on lists in webpages and in results from searches of electronic resources
<i>Usage Data Setup Status</i>	The status of the library's arrangement to receive usage data for the product	text	FR40	Pending / In process / Done / Not applicable	O	N	
<i>In Process Note</i>	Additional information regarding in process actions and decisions	text			O	N	

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Processing Workflow Renewal and Termination Group							
Definition:	Information necessary to manage the renewal or termination process for an Electronic Product						
Elements	<i>Electronic Product Renewal Review Status, Electronic Product Renewal Expected Decision Date, Electronic Product Renewal Status Note, Electronic Product Evaluation History, Electronic Product Termination Status, Electronic Product Termination Status Note</i>						
Notes	FR46, FR47						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Product Renewal Review Status</i>	The status of an E-Product that is undergoing renewal review	text	If value is Terminated or Expired, Electronic Product should not appear in any public lists of available resources FR46.5	Renewal pending / Under review / Comparison in progress / Approved for renewal / Renewal initiated / Renewal completed / Renewal rejected / Expired / Terminated	O	N	Values are examples and can/should be defined and/or expanded by local institutions
<i>Electronic Product Renewal Expected Decision Date</i>	The date by which a decision for renewal must be made	date	FR46.2		O	N	
<i>Electronic Product Renewal Status Note</i>	Detail on renewal or termination actions and decisions	text	FR46.5		O	N	
<i>Electronic Product Evaluation History</i>	Notes recorded about evaluations made by individuals in the renewal review process	text	May be a link to outside record FR46.6, FR47.4		O	N	
<i>Electronic Product Termination Status</i>	The current status in the workflow of the termination of an Electronic Product	text	FR47.3	Pending / Requirements fulfilled	O	N	e.g., certification that all institutional copies of product have been destroyed
<i>Electronic Product Termination Status Note</i>	Information regarding a decision to terminate the product	text	FR47.3		O	N	

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Workflow Rules Entity	
Definition:	Application logic; defines the possible statuses and next steps of the selection / acquisition / maintenance process
Note	The content and structure of this entity will be application-dependent, and its elements are not included in the Data Dictionary or this document. Examples of concepts that could be included: Acquisition Status, Acquisition Status Action, Acquisition Status Action Recipient, License Status Action, License Status Action Recipient, Troubleshooting Status, Troubleshooting Status Action, Troubleshooting Status Action Recipient, etc. FR24, FR25, FR26, FR27, FR28, FR29, FR30

Trial Entity							
Definition:	Information necessary to manage a trial for an Electronic Product						
Elements	<i>Trial ID, Electronic Resource On Trial, Interface On Trial, Trial Uniform Resource Indicator, Trial Uniform Resource Indicator Type, Trial Username, Trial Password, Trial Start Date, Trial Expire Date, Trial Available To Public Indicator, Trial License Required Indicator, Trial Note</i>						
Note	FR28						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Trial ID</i>	The identification number assigned to the Trial record by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Trial record to other data
<i>Electronic Resource On Trial</i>	The electronic resource for which a trial is arranged	pointer	FR28.2	ID from Electronic Resource entity.	RA	N	Use either an Electronic Resource ID or an Interface ID but not both in one record
<i>Interface On Trial</i>	The interface for which a trial is arranged	pointer	FR28.2	ID from Interface entity	RA	N	Use either an Electronic Resource ID or an Interface ID but not both in one record
<i>Trial Uniform Resource Indicator</i>	The URI used to access the product during the trial period	text	Hypertext link functionality. Paired element with Trial Uniform Resource Indicator type FR14.1, FR28.1	Layout: URI. Latest Draft: Uniform Resource Identifiers (URI): Generic Syntax (RFC 2396) (August 1998.)	RA	N	
<i>Trial Uniform Resource Indicator Type</i>	The type of URI that is being used for the trial	text	Paired element with Trial Uniform Resource Indicator FR28.1	URL, URN, etc.	O	N	

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Trial Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Trial Username</i>	The user name that must be used to access the product on trial	text	FR28.1		RA	N	
<i>Trial Password</i>	The password that must be used to access the product on trial	text	FR28.1		RA	N	
<i>Trial Start Date</i>	The date the trial begins or on which the product becomes available	date	FR28.2		R	N	
<i>Trial Expire Date</i>	The date on which the trial ends or that the product will no longer be accessible unless acquired	date	FR28.2, FR28.3		R	N	
<i>Trial Available To Public Indicator</i>	An indication of the availability of the trial product to the public	logical		Yes / No	R	N	
<i>Trial License Required Indicator</i>	Indicates whether a license is required for the product's trial period	logical		Yes / No	R	N	
<i>Trial Note</i>	Additional information about the trial access	text	FR7.2, FR28.2		O	N	

Consortium Entity							
Definition:	Information about a consortium with whom the local institution cooperates						
Elements	<i>Consortium ID, Consortium Name, Consortium Alternate Name, Consortium Address, Consortium Note</i>						
Notes	A type of organization pulled out for convenience in managing data. FR19, FR45						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Consortium ID</i>	The identification number assigned to the Consortium by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Consortium record to other data
<i>Consortium Name</i>	The official name of the consortium	text	FR45.1		R	N	
<i>Consortium Alternate Name</i>	Other names by which the consortium may be known	text	FR45.1		O	Y	Could be parent organization that has been absorbed or renamed
<i>Consortium Address</i>	The mailing address of the consortium	text	FR45.1		RA	N	
<i>Consortium Note</i>	Notes which clarify the consortium information	text	FR7.2, FR45.1		O	N	

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Partner Library Entity							
Definition:	Information about library partners who may cooperate in consortial deals						
Elements	<i>Partner Library ID, Partner Library Name, Partner Library Alternate Name, Partner Library Address, Partner Library IP Ranges, Partner Library Note</i>						
Note	A type of organization pulled out for convenience in managing data. FR19, FR45.1						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Partner Library ID</i>	The identification number assigned to the Partner Library by the electronic resource management system	unique ID	system assigned number		R	N	Links a Partner Library record to other data
<i>Partner Library Name</i>	The official name of the partner library	text	FR45.1		R	N	
<i>Partner Library Alternate Name</i>	Other name(s) by which the partner library is known	text	FR45.1		O	Y	
<i>Partner Library Address</i>	The mailing address of the partner library	text	FR45.1		RA	N	
<i>Partner Library IP Ranges</i>	The set of IP addresses associated with the partner library	text	FR45.1		O	N	To be used if a local institution or individual is serving in the point role for a consortial acquisition
<i>Partner Library Note</i>	Information needed to clarify the partner library or its role in the consortium	text	FR7.2, FR45.1		O	N	

Consortial Participation Bridge Entity							
Definition:	Establishes relationships between an Acquisition, a Consortium, and possibly a Partner Library						
Elements	<i>Consortium Participation ID, Consortial Acquisition, Consortium Acquiring, Consortial Partner, Consortial Fund Contribution, Number Of Consortial Participants, Consortial Issues Note</i>						
Notes	Required only if an Acquisition is acquired in cooperation with a Consortium. FR19, FR45						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Consortium Participation ID</i>	The identification number assigned to the bridge by the electronic resource management system	unique ID	system assigned number		R	N	
<i>Consortial Acquisition</i>	The acquisition associated with a consortium	pointer		ID from Acquisition entity	R	N	

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Consortial Participation Bridge Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Consortium Acquiring</i>	The consortium that has arranged for the acquisition	pointer	May be used to generate reports about consortial agreements or to trigger certain actions, e.g. route messages to a consortial liaison FR45.1	ID from Consortium entity	R	N	The consortium may or may not serve in one or more of the following capacities: as negotiating intermediary, with or without a fee for services; as the vendor who accepts payment for the product; or as the named licensee for a particular agreement
<i>Consortial Partner</i>	The participating institution(s) in a consortial agreement	pointer	Paired element with Consortial Fund Contribution	ID from Partner Library entity	O	N	May be used to identify institutions with whom cost sharing and/or renewal decisions must be coordinated
<i>Consortial Fund Contribution</i>	The monetary contribution made by the partner library in a consortial purchase	text	Paired element with Consortial Partner FR44.2		O	N	Can be expressed as a percentage of the total amount or as a dollar figure. Would not be used if Partner Libraries are not tracked in general or for this product.
<i>Number Of Consortial Participants</i>	The number of library participants in a consortial deal	numeric	If Consortial Partner element is filled in for a particular Acquisition, system should automatically calculate this number FR45.1		RA	N	To be entered manually when the consortial partners are not tracked, but the number of participants need to be recorded for cost-sharing, etc.
<i>Consortial Issues Note</i>	Information relating to or clarifying consortial issues in this agreement	text	FR45.1		O	N	

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Library Entity							
Definition:	Records information about different libraries within an institution which may be acquiring the product						
Elements	<i>Library ID, Library Name, Library Alternate Name, Library Address, Library Locations, Proxy Information, Library Note</i>						
Note	FR18.1, FR19						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Library ID	The identification number assigned to the Library by the electronic resource management system	unique ID	system assigned number		R	N	Links a Library record to other data
Library Name	The official name of the library	text			R	N	
Library Alternate Name	Other name(s) by which the library is known	text			O	Y	
Library Address	The mailing address of the library	text			RA	N	Can be an internal mailstop or other mailing address
Library Locations	Local locations associated with the library	pointer	Used for generating staff displays FR18.1.1	ID from Location entity	O	Y	
Proxy Information	The URI prefix used to direct access through a proxy server or other information needed to establish proxy connections in general	text	FR14.3		O	Y	
Library Note	Additional information needed to clarify the library data	text	FR7.2		O	N	

Library Acquisition Bridge Entity							
Definition:	Used to identify which local libraries are cooperating in the acquiring of an Electronic Product						
Elements	<i>Library Acquisition ID, Acquisition Coordinated, Library Cooperating, Cost Share, Cost Share Percentage, Cost Share Note</i>						
Notes	FR19, FR44.2, FR44.3						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Library Acquisition ID	The identification number assigned to each bridge record by the electronic resource management system	unique ID	system generated identifier		R	N	

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Library Acquisition Bridge Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Acquisition Coordinated</i>	The business transaction that is being arranged	pointer		ID from Acquisition entity	R	N	
<i>Library Cooperating</i>	The library involved with the transaction	pointer		ID from Library entity	R	N	
<i>Cost Share</i>	Amount contributed by library to an electronic product acquisition	numeric	FR44.2		RA	N	For when a library is contributing a flat amount to the acquisition
<i>Cost Share Percentage</i>	The proportion of the funds contributed by the library to the cost of an Electronic Product	numeric	Recorded as a percentage FR44.2		RA	N	For when a library is contributing a percentage of the total to the acquisition
<i>Cost Share Note</i>	Other agreements regarding cost share	text	FR44.2		O	N	

Organization Entity							
Definition:	Information about organizations with connections to electronic products						
Elements	<i>Organization ID, Organization Name, Organization Alternate Name, Organization Address, Notice Address Licensor, Organization Note</i>						
Types	Licensor, Vendor, Publisher, Agent, Provider						
Note	Various other types of organizations are separated into their own entities for convenience in data management (e.g., Consortium, Partner Library, Library, etc.) FR19, FR42						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Organization ID</i>	The identification number assigned to the Organization by the electronic resource management system	unique ID	system assigned number		R	N	Links an Organization record to other data
<i>Organization Name</i>	The official name of the organization	text			R	N	
<i>Organization Alternate Name</i>	Other names by which the organization is known				O	Y	Could be parent organization or companies that have been absorbed or renamed
<i>Organization Address</i>	The mailing address of the organization	text	FR42.3		RA	N	
<i>Notice Address Licensor</i>	The notice address of the licensor	text	FR42.3		RA	N	To be used if organizational address differs for license purposes

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Organization Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Organization Note</i>	Additional information required to clarify the organization information	text	FR7.2		O	N	

Organization Library Bridge Entity							
Definition:	Describes the relationship between an Organization and a Library						
Elements	<i>Organization Library Bridge ID, Organization Working With Library, Library Working With Organization, Account Identifier Assigned To Library</i>						
Notes	FR19						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Organization Library Bridge ID</i>	The identification number assigned to the bridge by the electronic resource management system	unique ID	system assigned number		R	N	
<i>Organization Working With Library</i>	The organization with whom a particular library has an established working relationship	pointer		ID from Organization entity	R	N	
<i>Library Working With Organization</i>	The library with whom a particular organization has an established working relationship	pointer		ID from Library entity	R	N	
<i>Account Identifier Assigned To Library</i>	Identifier assigned by an organization to a library's account	text			R	N	e.g., an organization may have account numbers for every ship-to address in their system

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Contact Entity							
Definition:	Information about individuals in the local setting or remote organizations who have a role in the lifecycle of an Electronic Product						
Elements	<i>Contact ID, Contact Name, Contact Title, Contact Address, Contact Email Address, Contact Phone Number, Contact Fax Number, Contact Role, Organization Represented, Consortium Represented, Library Represented, Partner Library Represented</i>						
Note	Contact information is for either local or remote individuals; the Contact Role specifies whether local or remote and which local or remote role the person is playing. FR26, FR28.3, FR42, FR45						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Contact ID	The identification number assigned to the Contact by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Contact record to other data
Contact Name	The name of the contact individual	text			R	N	For local information, it should be possible for this to hook into a CSO lookup. It is permissible to use a generic here if a name is unknown or inappropriate (e.g. Technical Support.)
Contact Title	The title of the contact individual	text			RA	N	
Contact Address	The mailing address of the contact	text			RA	N	May not be necessary if contact address is the same as the organization it represents. May be an internal address or a postal address.
Contact Email Address	The email address of the contact	text			R	N	
Contact Phone Number	The phone number of the contact	text			R	Y	
Contact Fax Number	The fax number of the contact	text			O	R	
Contact Role	The responsibility assigned to the contact person in general for electronic products	text	FR16.3, FR38.5.2, FR42.1, FR42.2	See Appendix A	R	Y	Roles should be site defined (examples might include Bibliographer, Selector, Product Sponsor, Interface Sponsor, Resource Steward, Billing Contact.) Note that this element is a generic situation apart from any Electronic Product and should be differentiated from Electronic Product Role, which is specific to a particular product.
Organization Represented	The organization that the contact represents	pointer		ID from the Organization entity	RA	N	Either an Organization ID or a Consortium ID or a Library Represented ID or Partner Library Represented ID but not more than one for any record in this entity

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Contact Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Consortium Represented	The consortium that the contact represents	pointer	FR45.2	ID from the Consortium entity	RA	N	Either an Organization ID or a Consortium ID or a Library Represented ID or Partner Library Represented ID but not more than one for any record in this entity
Library Represented	The local library that the contact represents	pointer		ID from the Library entity	RA	N	Either an Organization ID or a Consortium ID or a Library Represented ID or Partner Library Represented ID but not more than one for any record in this entity
Partner Library Represented	The consortial partner library that the contact represents	pointer		ID from the Partner Library entity	RA	N	Either an Organization ID or a Consortium ID or a Library Represented ID or Partner Library Represented ID but not more than one for any record in this entity

Contact Responsibilities Bridge Entity							
Definition:	Information about which products a contact is responsible for and what roles a contact plays for a particular product						
Elements	<i>Contact Responsibilities ID, Contact Responsible, Electronic Resource Under Care, Interface Under Care, License Under Care, Acquisition Under Care, Electronic Product Role</i>						
Note	Contact responsibility information is for either local or remote individuals. The Contact Role specifies whether local or remote and which local or remote role the person is playing. FR19, FR26, FR42, FR45						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
Contact Responsibilities ID	The identification number assigned to the bridge record by the e-resource management system	unique ID	system generated identifier		R	N	
Contact Responsible	The individual assigned as contact for the Electronic Product	pointer		ID from Contact entity	R	N	
Electronic Resource Under Care	The e-resource assigned to the contact	pointer		ID from Electronic Resource entity	RA	N	Use either an E-Resource ID or an Interface ID but not both in one record. If a contact has role solely with a license or an acquisition for a product, that is recorded using the License Under Care or Acquisition Under Care options.

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Contact Responsibilities Bridge Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Interface Under Care</i>	The interface assigned to the contact	pointer		ID from Interface entity	RA	N	Use either an E-Resource ID or an Interface ID but not both in one record. If a contact has role solely with a license or an acquisition for a product, that is recorded using the License Under Care or Acquisition Under Care options.
<i>License Under Care</i>	The license assigned to the contact	pointer		ID from License entity	RA	N	For when a contact has a role only in the license of a resource
<i>Acquisition Under Care</i>	The acquisition assigned to the contact	pointer		ID from Acquisition entity	RA	N	For when a contact has a role only in the business agreement for a resource
<i>Electronic Product Role</i>	The role that the contact is playing in the care of this Electronic Product	text		See Appendix A	RA	N	If contact is undertaking all roles, this may be left blank. Note that this element is specific to a particular product and should be differentiated from Contact Role, which is a generic situation apart from any Electronic Product.

Work Entity							
Definition:	Information about the intellectual work from which the resource has been derived						
Elements	<i>Work ID, Electronic Resource Title Continues, Electronic Resource Title Continued By, International Standard Text Code, Subject, Uniform Title, Author</i>						
Note	This entity is included in the data structure to indicate those elements associated with a work (regardless of the work's manifestation as an Electronic Product) that are needed for use by an electronic resource discovery tool. However, it is anticipated that in actual system implementations these elements will be derived from external systems. Alternatively, if no external system exists from which these elements could be derived, the elements could be incorporated into the Electronic Resource entity; in that case, some alternative structure must be created to relate different electronic resource manifestations of the same work with one another. Disclaimer: The authors are using the expression "work" in a non-FRBR sense in this data structure. FR8						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Work ID</i>	The identification number assigned to the Work by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Work record to other data

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Work Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Electronic Resource Title Continues</i>	The title immediately preceding the title of the resource	text	Used for display and resource discovery. May be derived from an external data source or locally assigned. May be created by system. FR5		O	Y	MARC equivalent 780. If the previous title was an electronic resource or a work identified in the ERMS, this should be a pointer to an Electronic Resource ID or a Work ID.
<i>Electronic Resource Title Continued By</i>	The title immediately succeeding the title of the resource	text	Used for display and resource discovery. May be derived from an external data source or locally assigned. May be created by system. FR5		O	Y	MARC equivalent 785. If the later title was an electronic resource or a work identified in the ERMS, this should be a pointer to an Electronic Resource ID or a Work ID.
<i>International Standard Text Code</i>	A voluntary numbering system for the identification of textual works	text		Layout: ISTC. Latest Draft: ISO Committee Draft 21047.	O	N	
<i>Subject</i>	The topic of the content of a resource, which may be expressed as keywords or terms from accepted classifications or thesauri	text	FR5	restricted to a canonical list of subject terms (site-defined or taken from an external authoritative source, e.g. LCSH)	R	Y	Source of definition: Dublin Core Metadata Initiative

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Work Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Uniform Title</i>	A heading consisting of the title by which an item or a series is identified for cataloging purposes when the title is not entered under a personal, corporate, meeting, or jurisdiction name in a name / title heading construction	text	Used for display and resource discovery. May be derived from an external data source or locally assigned. FR5		O	Y	Source of definition: MARC 21
<i>Author</i>	The person or body that is identified as the creator of the electronic resource	text	FR5		O	Y	Usually present on single title resources

Related Version Entity							
Definition:	Information about a related resource which is associated in some fashion with an electronic resource under control by the ERMS						
Elements	<i>Related Version ID, Work Associated With Related Version, Related Version Title, Print International Standard Book Number, Print International Standard Serial Number, Local Record Number, Print Price, Print Subscription Identifier</i>						
Note	A Related Version does not necessarily need to be one acquired by the local institution. If an instance of this data structure does not support a Related Version entity, then some of the elements stored here may need to become part of the Electronic Resource entity with some loss of functionality. May be recorded in an external system with which the ERM tool communicates. FR8, FR43.3, FR43.4.2, FR43.6						
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Related Version ID</i>	The identification number assigned to the Related Version by the electronic resource management system	unique ID	system generated identifier		R	N	Links a Related Version record to other data
<i>Work Associated With Related Version</i>	The work from which the related resource was derived	pointer	FR8	ID from Work entity	R	N	
<i>Related Version Title</i>	Title for the print or other tangible version of the resource	text			O	N	
<i>Print International Standard Book Number</i>	A unique machine-readable identification number assigned to the print version of a resource	text		Layout: ISBN. ISO Standard 2108.	RA	Y	This is repeating, because the same book in print may have multiple ISBNs. (e.g., paperback, clothbound, etc.) Source of definition: ISBN Home page: http://www.isbn.org

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Related Version Entity (continued)							
Element	Definition	Element Type	System Use / Functionality	Values	Option-ality	Repeat-ability	Notes / Examples
<i>Print International Standard Serial Number</i>	A unique identification number assigned to each serial title by centers of the International Standard Serial Number Network	text		Layout: ISO Standard 3297-1975; ANSI Z39.9-1979	RA	N	Source of definition: CONSER Editing Guide
<i>Local Record Number</i>	The record number that is assigned by a local library management system to the bibliographic record of the related version	text			O	N	
<i>Print Price</i>	The price of the print version of the electronic resource	text	Preferably a link to an LMS system		RA	N	This link or recorded information is used only if the print price has an impact on the electronic version or vice versa
<i>Print Subscription Identifier</i>	An identifier associated with a print subscription that must be used to register the electronic version for online access	text	FR38.2		RA	N	e.g., a subscription number

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Appendix A1 Contact Roles

Local Billing Contact	Vendor Billing Contact	Consortium Billing Contact
Local Instructional Contact	Vendor Contract Administration	Consortium Cataloging Contact
Local License Contact	Vendor Customer Support	Consortium General Contact
Local MARC Records Contact	Vendor General Contact	Consortium License Contact
Local Network Contact	Vendor IP Address Update Contact	Consortium MARC Records Contact
Local OpenURL Resolver Contact	Vendor MARC Records Contact	Consortium OpenURL Resolver Contact
Local Selector	Vendor Sales Representative	
Local Technical Contact	Vendor Technical Support	
Local Trial Contact	Vendor Training Representative	
Local Troubleshooter		

Appendix A2 User Groups

Role	Definition	Note
Faculty	Indicates faculty as a class of user	Includes current full-time, part-time and visiting faculty, as well as emeriti. Required for academic institutions only
Student	Indicates students as a class of user	Includes current full-and part-time students of the licensee and its participating institutions. Required for academic institutions only
Employee	Indicates employees as a class of user	Includes current full-and part-time employees of the licensee and its participating institutions, including temporary, contract and grant-funded employees
On-site library patron	Indicates walk-in users to the library as a class of user	
On-site institutional patron	Indicates walk-in users or other on-site visitors to the institution's premises, who have access to the licensee's public workstations and network facilities while physically present, as a class of user	
Alumni	Indicates former students who hold a degree from the participating licensed institution as a class of user	Required for academic institutions only
Affiliated researcher	Indicates persons other than current students, faculty, or employees, who by virtue of a specific research relationship with the licensed institution, its faculty or employees, are normally afforded access to institutional resources in the course of their work, as a class of user	
Retiree	Indicates former employees who have retired from the licensed institution as a class of user	
Registered library patron	Indicates an individual who is duly registered for access to the library's resources and services as a class of user	Chiefly used by public libraries
Adult library patron	Indicates an individual in the adult age category who is registered for access to the library's resources and services as a class of user	Chiefly used by public libraries
Child library patron	Indicates an individual in the child age category who is registered for access to the library's resources and services as a class of user	Chiefly used by public libraries
Senior library patron	Indicates an individual in the senior age category who is registered for access to the library's resources and services as a class of user	Chiefly used by public libraries
Young adult library patron	Indicates an individual in the young adult age category who is registered for access to the library's resources and services as a class of user	Chiefly used by public libraries

Note: While including more groups than those outlined as user privilege types in Z39.83 for circulation purposes, all Z39.83 types can be mapped here (<http://www.niso.org/standards/resources/z3983pt1rev1.pdf>).

Notes

Electronic resource (Electronic resource): May require multiple iterations by format, if format has license/acquisition detail implications.

Terms: For those terms designated RA, some institutions may not want to track. The Data Structure only attempts to suggest Optionality, but there should certainly be leeway between R, RA, and O as a system is developed.

Country of implementation: The authors recognize that our collective area of experience is limited to the practice of ERM in libraries of the United States. We have tried to generalize elements for non- country specific use or indicate where elements may be solely of interest or use to U.S. libraries, but we have not attempted to map the universe of elements of interest to the practice of electronic resource management in other countries. System designers desiring to build products for international use should keep this in mind and research functional requirements beyond the United States.

Functional Requirement items not mapped above:

FR3 is not mapped above on the assumption that there is a higher level capability with system usernames that will permit view and editing of any grouping of the elements individually or together.

FR4 is not mapped above on the assumption that there is a higher level capability to accomplish reports.

FR12 implies connections between the above and other systems such as LMSs.

There are indications in the above where such connections would be most logical or useful, but not all of them are fully annotated.

Nothing in the above precludes the specifications defined in FR14.5.

FR20 assumes a higher level capability to the ERMS.

FR31 implies archived data, which the above design does not go into.

FR34.2 implies a separate logging system not detailed above.

Nothing in the above precludes the specifications defined in FR40.4.

FR41.8 implies a sophisticated and calculable method for storing incidents and recording incident start and end times. This detailed functionality is not mapped in this document.

In order to facilitate FR42.4, the incident log functionality will need to record contact id for the appropriate vendor contact.

FR43.4.2 only applies where ERMS is interconnected with an LMS. The connection of which print cancellations to block would happen through the print version entity.

FR43.5.2 implies integration with a payment system where historical payment data is recorded and can be used as the basis for a calculation with the price cap.

FR46.3 is workflow functionality, and only the groundwork for workflow is laid above.

FR46.4 contains some workflow functionality, only the groundwork for which has been laid above.

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