

OLE Licensing Technical Document

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Purpose

The Licensing process in OLE includes a back and forth negotiating process between the licensing institution and the electronic resource vendor to set the final terms of the license contract. This is intended to be completed whenever appropriate during the electronic resource acquisition process. OLE will store notes, data and attached documents from this licensing period in an electronic document, or e-doc, called a License Request.

Note: The license request is only partial functionality in OLE. A license editor is scheduled for 3.0.

Dependencies (db tables)

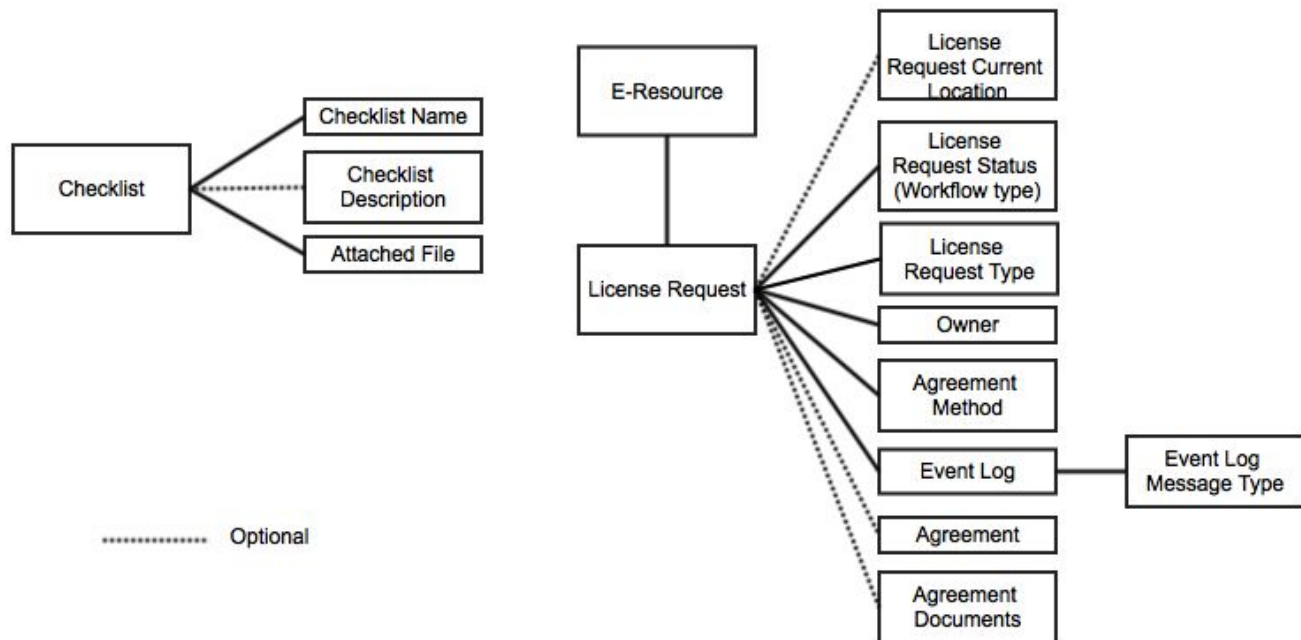
Tables used in License Request creation

OLE_E_RES_REC_T	E-Resource Record
OLE_AGR_DOC_T	Agreement
OLE_AGR_MTH_T	Agreement Method
OLE_LIC_STAT_T	License Request Status
OLE_LIC_DOC_LOCN_T	License Request Current Location
OLE_LIC_REQS_TYP_T	License Request Type
LIC_WRK_FLW_TYP_T	License Workflow Type

Tables where License Request is used/referenced

OLE_AGR_DOC_T	Agreement
OLE_E_RES_REC_T	E-Resource Record
...	

Logical Data Model (Class Structure)

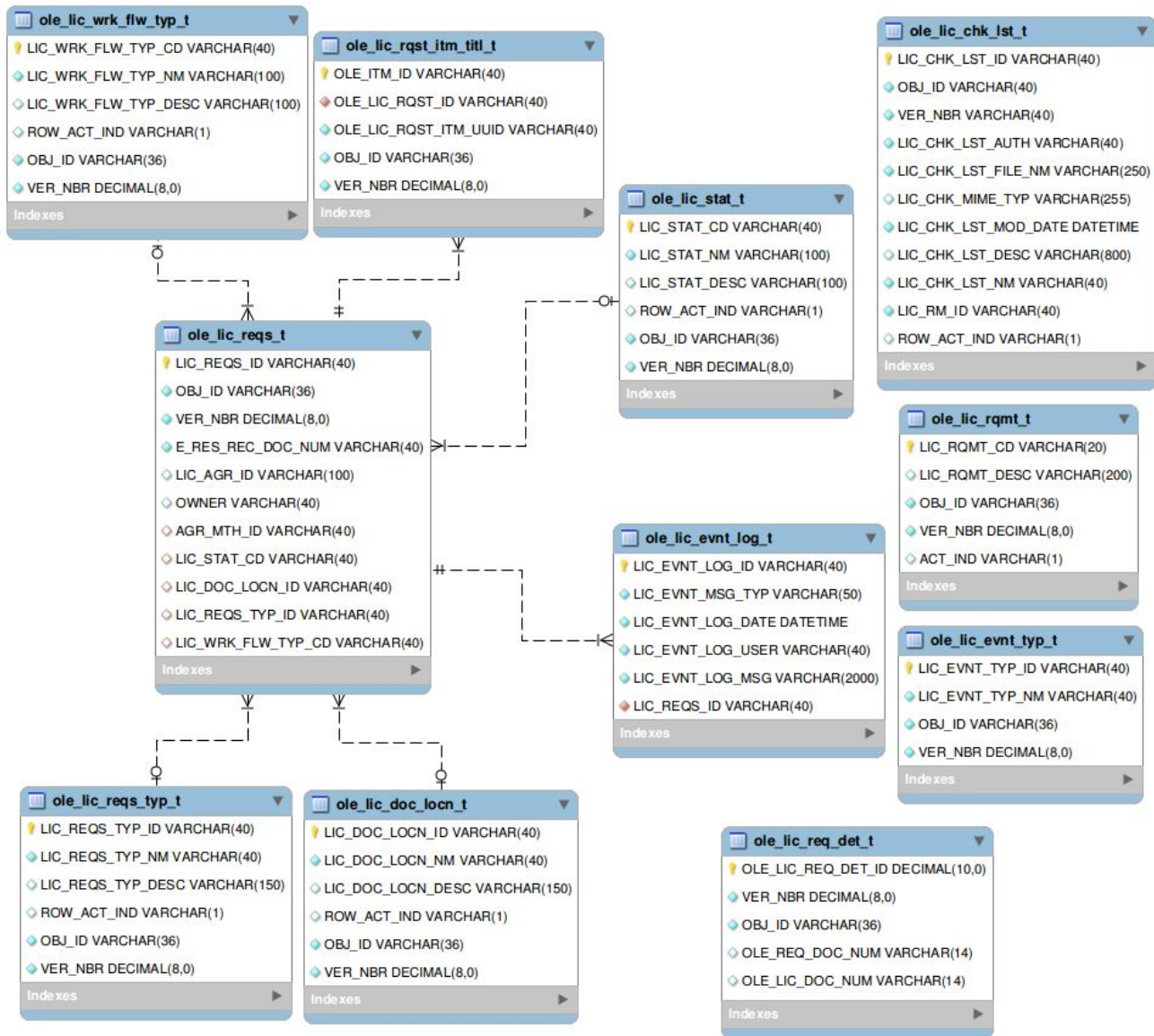


The License Request must be created/linked to an E-Resource record. The License Request, in order to be submitted to the workflow, must have a License Request Status, License Request Type, Owner, and Agreement Method. Zero to any number of Agreements and Agreement Documents may be attached to the License Request.

Checklists are used alongside the License Request but are not linked. Checklist Name and the Attached File is required for a Checklist. A Checklist can also have a Description for staff to include details about how the Checklist can be used.

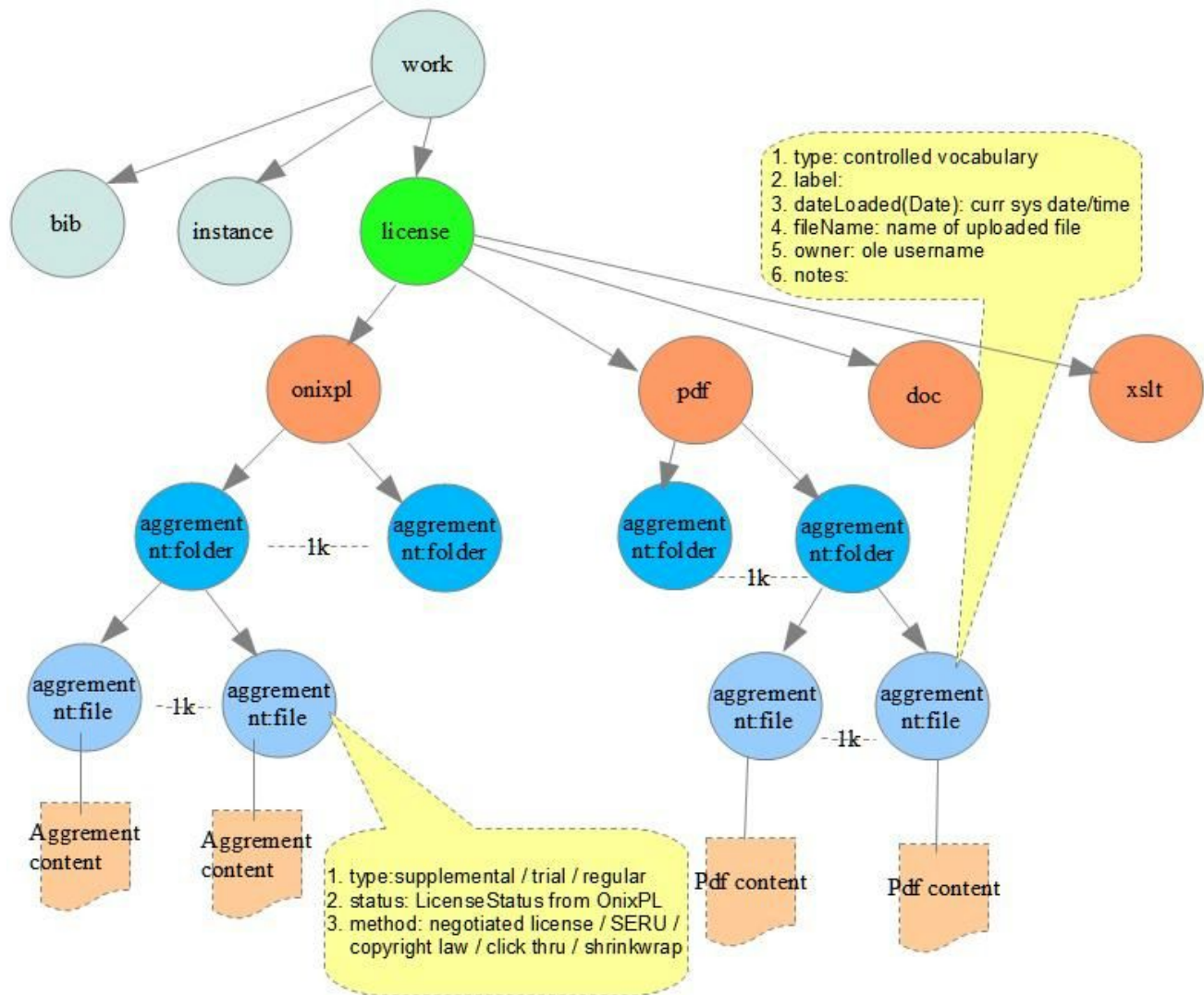
Physical Data Model (Database Schema)

License Request:



The Licensing process begins within the E-Resource Record. Once a License Request is created, information is entered in the *ole_lic_reqs_t* table. The other tables connected to the *ole_lic_reqs_t* table are maintenance tables specific to the license request process. The exception is the Checklist, *ole_lic_chk_lst*, table. The Checklist, as a list of local institutions' contractual requirements, is used alongside the License Request document but is in no way connected to the License Request.

Agreement:



Service Interface Design (Java)

Business Rules Class

Service Interface Design (SOAP)

User Interface Design

The OLE License Request document uses KRAD's UIF (User Interface Framework). A very good guide on this can be found [here](#). The Spring Beans XML used in the case of License Request is the *OleLicenseRequestBo.xml*. The Spring Beans XML used in the case of the Agreement document is *OleAgreementDocumentMetadata.xml*, the checklist is *OleCheckListBo.xml*, and the E-Resource License page is *OLEEResourceLicense.xml*. All are found under the *datadictionary* folder.

Data Importing

1. Ingest Workflow doctype xmls (*OleAgreementMaintenanceDocType.xml* and *OleLicenseRequestDocTypes.xml*) thru XML Import on the Admin tab.
 - a. They are part of Rice framework, which will persist the data related to workflow for License.
2. Ingest License.xml ([file available](#)) through the KRMS Builder, also found on the Admin tab. The file consists of Rule(s) and action, to initiate License workflow, Agreement method and License Request Type. Based on each combination, different rules will execute the PeopleFlow workflows.
 - a. The Following rules are some that get implemented:
 - Rule1 (newNegFAppCheck) : Validates whether the licenseType is New, the agreementMethod is Negotiated License and the workflowName is Full Approval, if this validation becomes true, newNegFApp People Flow Action will be executed which contains certain predefined roles namely OLE_LicenseReviewer, OLE_LicenseManager, OLE_Signatory and OLE_Licensing_Approver.
 - Rule2 (newSERUSignCheck) : Validates whether the licenseType is New, the agreementMethod is SERU and the workflowName is Signatory Only, if this validation becomes true, newSERUSign People Flow Action will be executed which contains certain predefined roles namely OLE_Signatory and OLE_LicenseManager.
 - Rule3 (newSERURevCheck) : Validates whether the licenseType is New, the agreementMethod is SERU and the workflowName is Review Only, if this validation becomes true, newSERURev People Flow Action will be executed which contains certain predefined roles namely OLE_LicenseReviewer and OLE_LicenseManager.
 - etc..
 - b. If None of the rules becomes true, validation message are thrown in the screen.
3. Ingest Agreement (Docstore via <http://tst.docstore.ole.kuali.org/> Ingest String Content). Needed for Find/Link Agreement (on License Request Screen) (latest file is ONIX-PL-request.xml - that file is attached to this page)

Data Exporting

OLE uses a RDBMS backend and hence any data can be exported using simple SQL queries. Currently there is no direct way in which Licensing data can be exported directly from OLE.

For checklists, you may upload and download checklist files through the “Manage Checklist” screen on the Select/Acquire tab.

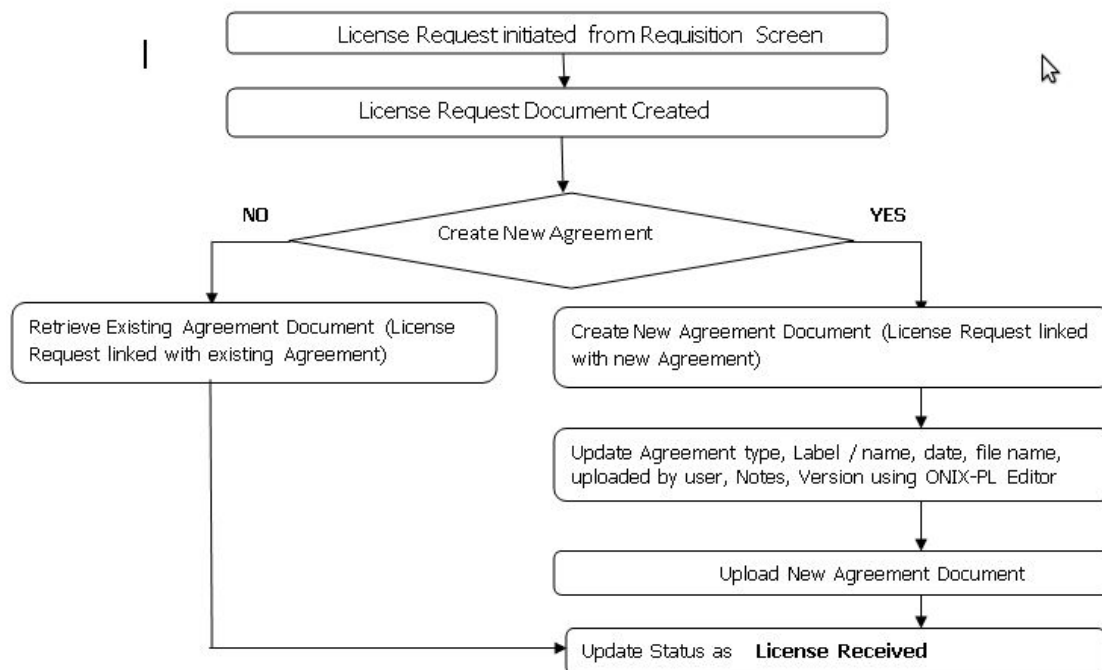
Workflow

License Request Creation:

1. Create an E-Resource through the E-Resource screen from the Select/Acquire tab. In the left pane navigation, click “Licenses”. Click “Start New License”: This will generate the License Request. On the E-Resource Record, a link to the License Request will appear in the table below the “Start New License” button.
2. From the Select/Acquire tab, select the License Request document and follow Approval workflow (stepwise : License Requested, Approval etc...). Check the Route Log to find to whom the License Request is routed to for further action. Initially the document is assigned to the role License-Assignee (e.g. fred)
3. E-Resource Records are not affected by the License Request process.

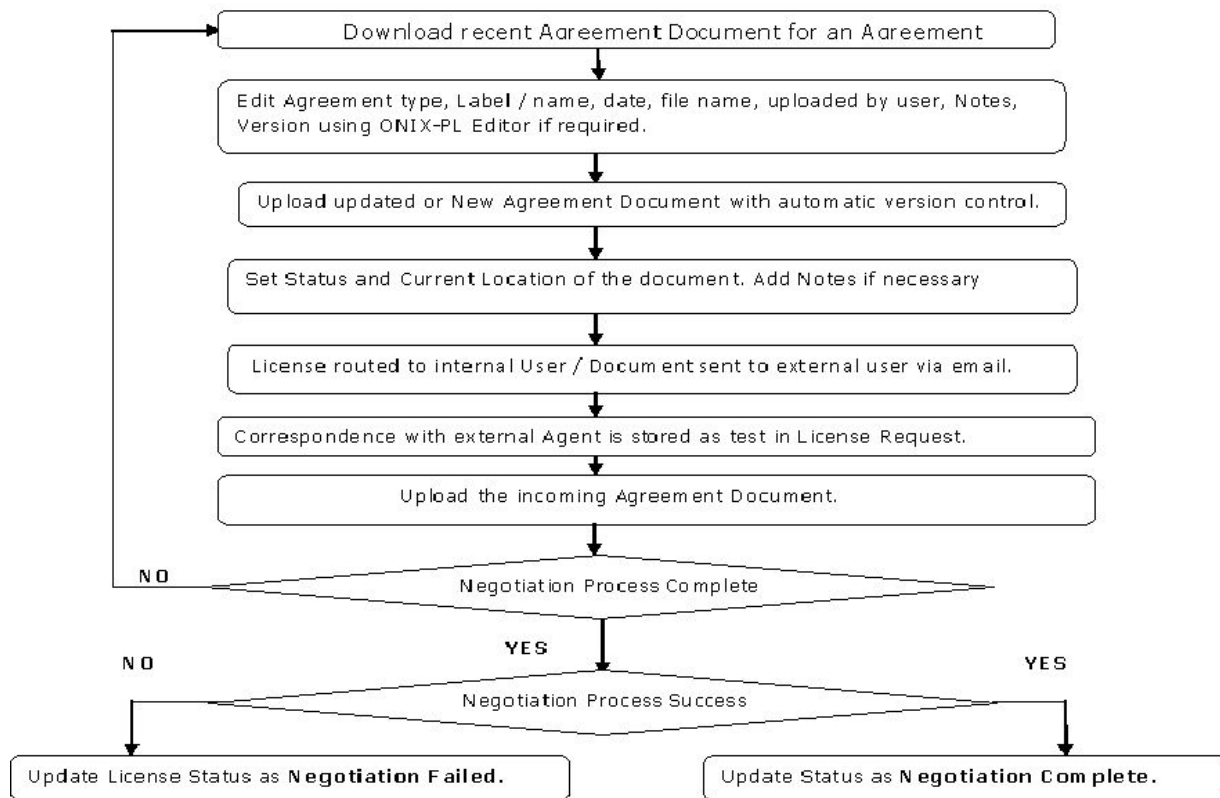
New License:

License Request Flow:



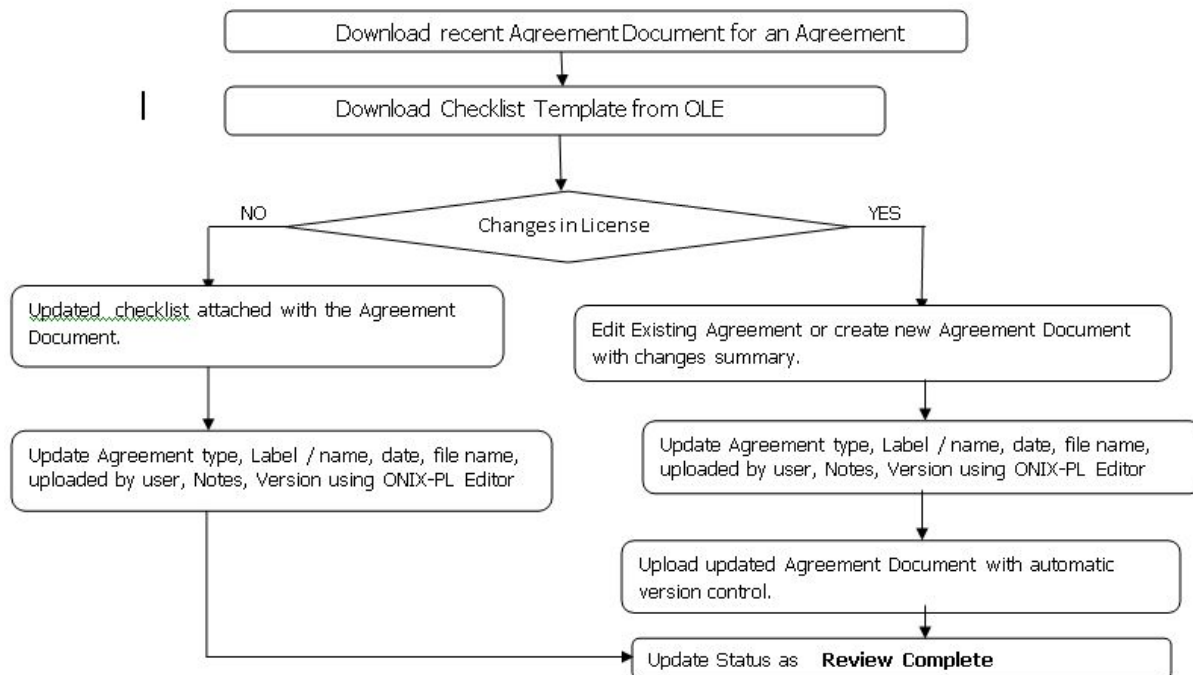
License Negotiation:

License Negotiation Flow :



Compare License:

Compare License Flow:



System Parameters

Namespace Code	Parameter Name	Description

Roles and Permissions

Permission ID	Permission Name
OLE10135	License Request workflow initial filter
OLE10136	Full License Request workflow
OLE10169	Initiate Checklist Document
OLE10170	Edit Checklist Document
OLE10171	Initiate License Request Status Document
OLE10172	Edit License Request Status Document
OLE10173	Initiate Current Location Document
OLE10174	Edit Current Location Document
OLE10175	Initiate License Request Type Document
OLE10176	Edit License Request Type Document
OLE10177	Initiate Agreement DocType Document
OLE10178	Edit Agreement DocType Document
OLE10179	Initiate Agreement Method Document
OLE10180	Edit Agreement Method Document
OLE10181	Initiate Agreement Status Document
OLE10182	Edit Agreement Status Document

OLE10183	Initiate Agreement Type Document
OLE10184	Edit Agreement Type Document
OLE10190	Edit License Request Document
OLE10191	Save License Request Document
OLE10137	License Request secondary filter
OLE10185	Blanket Approve

Role ID	Role Name	Permissions
OLE10057	OLE_LicenseConfiguration	OLE10136, OLE10169, OLE10170, OLE10171, OLE10172, OLE10173, OLE10174, OLE10175, OLE10176, OLE10177, OLE10178, OLE10179, OLE10180, OLE10181, OLE10182, OLE10183, OLE10184, OLE10190, OLE10191
OLE10053	OLE_Licenses	OLE10135, OLE10190, OLE10191
OLE10051	OLE_Signatory	OLE10137
OLE10055	OLE_Licensing_Approver	OLE10185
OLE10059	OLE_LicenseAssignee	
OLE10052	OLE_LicenseManager	OLE10190, OLE10191
OLE10054	OLE_LicenseReviewer	OLE10190, OLE10191
OLE10056	OLE_LicenseViewer	

PeopleFlow Logic

The below table lists the People Work flow based on the Rule. The rule need to pass two determinants (License Request Type and Agreement Method). Based on the Rule evaluation People Flow (workflow) Allowed, Not Allowed, Required determined.

Based on the user selection in drop down provided for Initiate License Workflow (selected by user in OLE_LicenseManager Role) and upon submission of document, the rule is evaluated and document routed to the users in People flow based on the selection.

If unallowable workflow status is selected, determined by the rule evaluation, the exception message (**“Owner must select allowable workflow for this license request type and Agreement Method.”**) is shown.

Rule	Allowed	*Not Allowed*	Required	Approval Requirements
License Request Type = New and Agreement Method= Negotiated License		Manual (Self), Signatory Only, Review Only, Approval Only, Renewal, Addendum	Full Approval	Need to be approved by ALL USERS in role.
License Request Type = New and Agreement Method= SERU	Full Approval, Signatory Only, Review Only, Approval Only	Manual (Self), Renewal, Addendum		Need to be approved by ALL USERS in role.
License Request Type = New and Agreement Method = *Copyright Law*	Full Approval, Review Only, Approval Only	Manual (Self), Renewal, Addendum		ANY in Role.
License Request Type = New and Agreement Method = *Click Thru*	Review Only, Approval Only	Manual (Self), Renewal, Addendum		ANY in Role.
License Request Type = New and Agreement Method = *Shrink Wrap*	Review Only, Approval Only	Manual (Self), Renewal, Addendum, Full Approval		ANY in Role.
License Request Type = Renewal and Agreement Method= Negotiated License		Manual (Self), Signatory Only, Review Only, Approval Only, Full Approval, Addendum	Renewal	Need to be approved by ALL USERS in role.
License Request Type = Renewal and Agreement Method= SERU	Manual (Self), Signatory Only, Review Only, Approval Only, Full Approval, Renewal	Addendum		ANY in Role.
License Request Type = Renewal and Agreement	Manual (Self), Signatory Only, Review Only,	Addendum		ANY in Role.

Method = *Copyright Law*	Approval Only Full Approval, Renewal			
License Request Type = Addendum and Agreement Method= Negotiated License	Manual (Self),Signatory Only, Review Only, Approval Only Full Approval, Addendum	Renewal		ANY in Role.
License Request Type = Addendum and Agreement Method = SERU	Manual (Self), Signatory Only, Review Only, Approval Only Full Approval, Addendum	Renewal		ANY in Role.

Roles assigned to People Flow :

Manual (Self) : Blanket Approve by the owner of the Document.

Review Only : Initiated by selecting Pending Review (PREV) by OLE_LicenseManager and submits the document. OLE_LicensingReviewer Role approves the document. Upon Complete status changed to Review Complete (RVWC) .

Signatory Only : Initiated by selecting Pending Signature(PSIG) by OLE_LicenseManager and submits the document. Document moves to action list of OLE_Signatory Role. Upon Complete status changed to Signature Complete(SIGC).

Approval Only : Initiated by selecting Pending Approval (PAPP) by OLE_LicenseManager and submits the document. OLE_LicensingApprover Role approves or disapproves the document. If document is approved status changed to Complete (LC) and document continues with Requisition workflow, else status changed to Negotiation Failed. (LNF) . Requisition document owner is notified of the status change.

Full Approval : Document first goes to Review Step. Upon completion status changed to Pending University (PUNI) . University processing complete (UNIC) selected manually by OLE_LicenseManager and document submitted again. Document goes to Signatory step and upon completion goes to Approval step.

Renewal : Document first goes to Review Step. Upon completion status changed to Pending University (PUNI) . University processing complete (UNIC) selected manually by OLE_LicenseManager and document submitted again. Document goes to Signatory step and upon completion goes to Approval step.

Addendum : Document first goes to Review Step. Upon completion document goes to Signatory step and upon completion goes to Approval step.