

This charge is now out of date. For current information, please see:
<https://fc-library.atlassian.net/wiki/spaces/FOLIO/pages/712343567/FERM+Charge>

FOLIO Electronic Resources Management Working Group

Charge:

The Five College FOLIO Electronic Resources Management Working Group (FERM) is tasked with reaching consensus on issues related to data conversion, data management, workflows, policies and procedures. The group will be concerned with the electronic resource life-cycle within FOLIO, to include but not limited to: ***Licences, agreements, orders, e-usage statistics, package management, organizations/vendors, data exchange and historic data needs.***

The work of this group will primarily center around the following FOLIO apps: ***ERM, E-holdings, eUsage, and Organizations (Vendors)***. Additionally this group will need to work closely with the Acquisitions Working Group on the order and invoice process as it relates to electronic resources.

There may be need to look at workflows and data in other apps especially as it relates to the acquisition process.

Membership:

Amherst: Paul Trumble
Hampshire: Amedeo DeCara
Mount Holyoke: Sara Colglazier
Smith: Jenna Lanterman
UMass: Jack Mulvaney

FIT Liaison: Kat Berry

General Working Group Charge:

Below is the General Working Group Charge which is also available at
<https://drive.google.com/open?id=16XRMk8auJQ5twqR7W3kqJYRK49OP9axN06dWsVJwKMw>

1. Provide onboarding for Working Group members
 - a. Review Shared Five College Principles (see below)
 - b. Get up to speed on FOLIO platform in general and appropriate modules/apps
 - c. Develop an understanding of SIG structure for the area of responsibility
 - i. Resources Management ([Fridays at 830am](#))

1. ERM (Wednesday at 8am)
2. Apps integration (Fridays at 415)
3. ACQ (not currently meeting)
2. Establish Working Group organizational system
 - a. Identify a Lead for the group (May 30th working group members will decide).
 - b. Identify broader group of stakeholders for consultation TBD
 - c. Use folder in FIT Google Team Drive and assign permissions to group members
<https://drive.google.com/drive/folders/1V1X8vnGxLI65CPiNysObtryjYSf7jh9N>
 - d. Request WG Slack Channel from FIT - DONE
 - e. Establish meeting schedule (May 30th working group members will decide).
 - f. Write introductory blog post about WG formation -TBD
3. Identify relevant SIGs/sub-groups and designate representatives to:
 - a. Routinely attend SIG meetings
 - i. If there are sub-sigs, determine whether they relevant to us, identify who can attend these
 1. We will attempt to align our meetings with either the RM or the ERM SIG meeting
 - b. Report back to Working Group
 - c. Represent 5C perspective on SIG
4. Begin process of aligning workflows in preparation for FOLIO
 - a. Solicit initial input from stakeholder groups as appropriate
 - b. Share documentation and relevant workflows/processes
 - c. Identify areas of policy/procedure alignment
 - d. Determine core functions
 - e. Interrogate areas of difference to find common ground
5. Identify data issues
 - a. What data is within the scope of the Working Group?
 - b. Is there overlap with other areas/Working Groups?
 - c. Where will data need to be aligned?
 - d. Is pre-migration cleanup necessary?
 - e. Permissions- are there fields or portions of data that need to have certain level of privileges for access?
6. Begin documenting workflows and procedures

Shared Five College Principles

Shared resource: The Five College libraries collections make up a single and shared library resource.

Best practices: In an agile manner, standardize, streamline and improve best practices.

Alignment: FOLIO is an opportunity to align multiple systems and create a more unified presentation of Five College library data; enabling more seamless access to collections.

Additional functionality: Once core functionality is established, improvements, and additional functionality can be explored and prioritized.

Communication: Commitment to transparent communication throughout all stages of the project.

Respect one another: When we debate and discuss differing opinions, we will always show respect to individuals. All of us will end up compromising on some aspects of the design or the project work. We recognize that this is hard work and time consuming. Many of us may be pushed outside of our comfort zone; however, we will remain respectful to one another. These guidelines are forward-looking and will guide Five College Library cooperation beyond the FOLIO implementation.

Leads of Working Groups will be asked to:

- Join Slack #Announce, and Group Specific Channel, and a LEADS channel
- Read and sometimes contribute to the Newsletter
- Be active in attending meetings that are asking for input, use-cases, and feedback in their areas of expertise.
- Lead the Working Group meetings and work on recommendations that will go to FIT
- Present recommendations to FIT/report back to the working group what FITs response is.
- Meet with FIT on a regular rotation

https://docs.google.com/presentation/d/1j5rxdIzItb1ZdCK3nKQR56vCQNH Bqwd4RwBk7_VWu3I/edit#slide=id.g43f3f09a51_0_21

FOLIO Project Resources:

Issues.folio.org

- create a login here. This login will work for the wiki and discuss as well
- This is where the development of features and functionality can be traced. This is a good reference.
- We will go over our JIRA ERM related tickets later this summer to make sure that we are in alignment with development.

Wiki.folio.org

- Central location for information about the SIGs (meeting minutes, communications, etc)

Discuss.folio.org

- A message board site for deeper discussion on particular topics and questions

- The ERM related Discussion topics get dumped into the FOLIO project ERM slack channel

FOLIO [Glossary](#)

Resource management SIG and Subgroups [Google drive](#)

Fivecolleges.edu\libraries\folio

- This site is the central point to find all things related to the FC FOLIO project
- Sign up for both Slack workspaces
 - FOLIO Project Slack
 - Follow these channels at the minimum. You can set notifications however you wish. I just go to this part periodically and scroll through the convos. I do not get alerts at all.
 - erm-team
 - resource-management
 - FC FOLIO Slack
 - You all have been invited to the ERM private channel. I would prefer if our communications are all housed in this channel, to minimize on email and to make sure that no one is accidentally not CCd on something.
- PROTIP! If you ever need to link to one of our ERM documents, go to the drive link on this site and navigate to the document. COPY and share this url! This will work for anyone and will not require them to login.
 - You will need to wait a bit between crafting the document and then seeing the document in this view only mirror, FYI.

Login to the FC FOLIO test instance

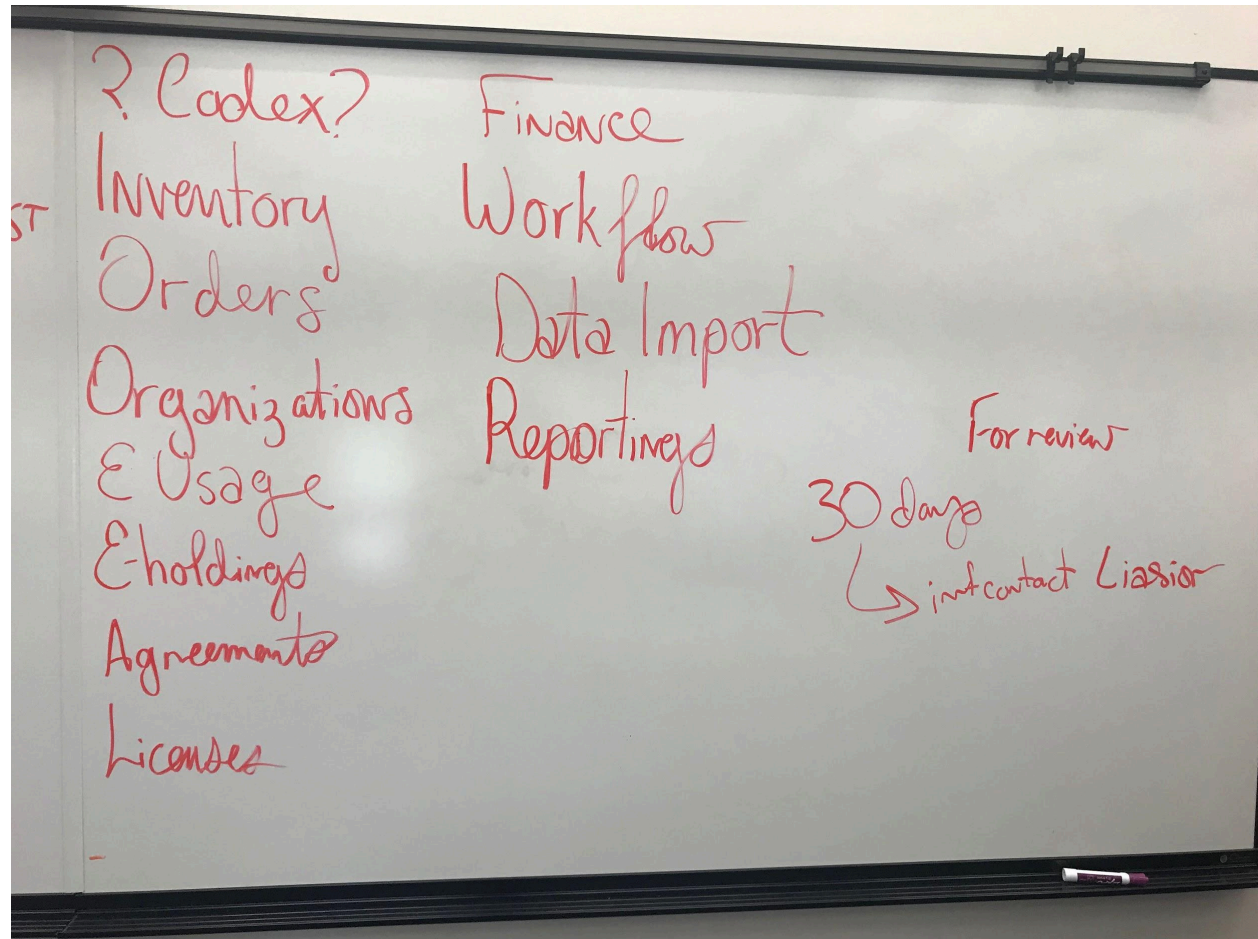
Fivecolleges.folio.ebsco.com

Username:foli

Password: Madison

You can create your own user account, according to Anya

These are the apps in FOLIO that will touch ERM processes in some way:



These are the sites I gave an overview of. I have notes above as well.

issues.folio.org - Jira

wiki.folio.org - wiki

some
login

discuss.folio.org - Discussion
Boards

fivecolleges.edu/libraries/folio

Folio Project Slack

Five Colleges

Sig listserve

This is our homework!

HW: Documents & Procedures

Hot: Resource URLs

- sig
- glossary
- access to Drive, slack, et

SIG
8-9 9-10 Working Group
8-10 am

May 30th: - pick reg meeting date + location Weds Am to
- pick a lead - contact FC person Sync w/ERM
or whom ever SIG

These are the SIGS relevant to ERM

