

Meeting Time: 8 am EST / 2 pm CET / 1 pm UK

Call in Number: <https://zoom.us/j/995679876>

Meeting URL: <https://zoom.us/j/995679876>

ERM Sub SIG Folio Wiki: <https://wiki.folio.org/display/RM/ERM+Sub+Group>

Google Folder: <https://drive.google.com/drive/folders/17X3tr6siZH8iS07kGcjAqUNl01zVrJmB>

Terms and definitions: https://docs.google.com/document/d/1vue-mbcULpZivWu69a7nAZEdC-H2yXPQqSblbL_0J6U

Slack Channel: # erm-team

Agenda March 4th 2020

Convener: Martina S.

Notetaker: Martina T.

Housekeeping:

- **All:** Please edit the attendees list below and indicate when you are there!
- Daylight Saving Time (US - March 8th / Europe - March 29th) - meeting times **8 am EDT / 1 pm CET / 12 noon UK**
- **Next ERM subgroup meeting:**
- **Next ERM implementers meeting:** March 11th
- all questions and topics for the ERM implementers meeting can be posted on this confluence page:
<https://wiki.folio.org/display/RM/ERM+implementers>
- **Open discuss posts:**
 - right now no new posts regarding erm

Agenda items:

1. Development progress - [ERM sprint 84 planning](#)
2. Update on RM SIG discussion on ERM implementer topics (Feb 28th) - [minutes](#) & [recording](#)
3. “Agreement Lines – expanding information contained in/displayed and able to be recorded under”
4. Alternate Names/Titles for Agreements - [implementers topics #7](#)
 - Ability to assign multiple names to an agreement record AND search on those names. - postponed to next week

Minutes

Development progress - [ERM sprint 84 planning](#)

- some jira ticket accepted for release, some released and done, some in code review
- [ERM-708](#) Use cell width and remove right alignment when displaying monograph coverage
- [ERM-689](#) Add monograph fields to KBART export
- Working on KBART package import – new option - New KBART job function --> When providing a KBART file – update an existing or create a new one / In future provide a better an UI, for now update – if package source and reference match , it will be updated – titles are added and dropped / Adding new packages is working right now - in QA
- [ERM-681](#) Fetch enhanced metadata for books from GOKb after harvesting - maybe not released on Friday - still backend work
- [ERM-668](#) Add ability to search/filter licenses based on custom properties (aka "terms") / Owen demonstrated it previously
- [ERM-713](#) Produce license term comparison report / Select licenses and export csv option – UI done but still backend work
- [ERM-724](#) , [ERM-725](#), [ERM-726](#), Display a callout message (bottom right): in Friday release
- LAS:eR - this sprint import licenses and packages - next sprints import license properties

Update on RM SIG discussion on ERM implementer topics (Feb 28th) - [minutes](#) & [recording](#)

- It is worth watching the recording

- Majority dedicated to update from Peter (Cornell) – highlight issues they came across and feedback from Sara (5C) about here experience
- Comments about usability issues - ERM apps and the general UX (with panes display, width of columns, table in result lists, open a result – whole screen or 3rd pane?)
- Peter mentioned lack of duplicate functionality of license and deletion – deletion can be solved by adding the right button – duplication a little bit of work
- Peter: It is a development process – impressed with the way it is going and those issues mentioned are tasks for future development
- Different approaches – how to populate data is quite different
- Cornell focusing starting with license – using license
- Sara more focused on Agreement – how to structure and organize it? – How will this tool help me manage it?
- Reflect on – flexibility in ERM is also challenging
- Institutions differ in approaches to use it
- Size might be a reason

“Agreement Lines – expanding information contained in/displayed and able to be recorded under”

- No. 8 on the ERM implementers page <https://wiki.folio.org/display/RM/ERM+implementers>
- Question about notes in general - different places for putting information - notes helper app vs. notes in specific areas – where can I add notes and where are they displayed?
- Link related agreement – there is a relationship with this agreement – but the types of relationships are limited right now. So there was not a type which was suitable for this use case. Notes in the related agreements are separate from the titles. This relationship feature is great.
- I am connecting the agreements, but not the specific agreement lines.
- Owen’s 3 thoughts: 1. Notes for Agreement line: questions notes fields vs notes app – extending an agreement line with a note field and would serve this use case
- 2. Advantage single note fields vs. attaching notes in notes app?
- 3. Should we look at something more specific? – use case for linking agreement lines together – functionality is more complicated - More detailed functionality would serve for the long term, but harder to achieve
- Whether beyond adding the notes – are there other pieces of information which should be stored at agreement line? – It could be more specific or would a note field be ok?
- Comment: please not to complicated - Note fields may be sufficient

- Want to avoid overcomplicated – but provide sufficient system so one don't end up with two or more system
- Two system because of access - Strength of both systems
- There are requirement on e-resource level – e.g. to document during the year whether titles should be canceled or document subject codes
- Question about reconsidering the notes helper app? Will you use notes more on the agreement level or on agreement line or eresource level? - Both – agreement level and at Agreement line level
- notes fields vs. notes helper app - having the notes app - connection between apps adds a level of complexity – however notes app approach gives us the possibility to categorize notes and use notes across applications and reusing notes in multiple places and cross apps
- Separate session on notes topic
- With notes helper app that we are supporting everyone's needs – need to add the note where you need them
- Are notes living in eholdings or in agreement?
- The Agreement line is an entity in the system and linked to the agreement and includes information and is pointer to the resource – in case of eHoldings it points to the resource in eHoldings - the note on agreement line level does not care where your resource is described because it points to it.
- Difference in adding at resource level vs. adding at agreement line level is that the resource might be in several agreements - the note at the resource level is not specific to a specific agreement – the note on agreement line level is specific to an agreement
- In eHoldings you need resource with a package combination than you can add a note from the helper app
- agreement line is separate und could have more than one agreement line over time for the same journal in the same package
- Also concerned putting notes here in eHoldings if they delete the package in my KB - what happens to my notes?
- The note has to be reassigned it - not automatically / The note is not deleted – assigned it to new package
- How do I know when to reassign? Need of an alert system for reassigned the notes / Notification from vendor is an issues
- What level did you attach your note? – Difficult complexity - Difficult to know which notes were attached at which level
- Topic for next week: Alternate Names/Titles for Agreements - [implementers topics #7](#)
- Topic in 2 weeks: Notes with more questions to the group

Chat

Von Virginia Martin an alle: 02:17 PM

That's how Duke plans on starting their implementation - with the licenses.

Von Khalilah an alle: 02:21 PM

Thank you Peter and Sara.

Von UMass Amherst (Five Colleges) an alle: 02:35 PM

+1

Von Virginia Martin an alle: 02:36 PM

Yes, I want to keep this as simple as possible, acknowledging that that is very challenging with the level of complexity in these agreements.

Von Eric Hartnett an alle: 02:36 PM

I agree with Kristin, we rely on our link resolver kb to track things like rolling walls.

Von Benjamin Ahlborn (SuUB Bremen) an alle: 02:37 PM

@Owen: I think we have discussed having Tags on Agreement Line Level before. Tags would IMO go a Long way to enhance the functionality

Sarah (and I) would like to have

Von Annika Schröer an alle: 02:37 PM

Yes @Kristin, that's exactly what we think and experienced in our current ERM. There's a lot that is nice to record - but this takes time and effort and we soon decided, to keep it simple.

Von Mariyam Thohira an alle: 02:38 PM

I agree with Kristen, too.

Von Felix (ZBW) an alle: 02:40 PM

Yes we Need this in the Long term

Von Sabrina Bayer an alle: 02:40 PM

Tags or something like this on e-ressource Level would be very useful

Von Alistair Morrison an alle: 02:41 PM

Hopkins is developing a database list manager system as a FOLIO module that does address access/authentication. We should be ready to demo in about a month. Would love to know if there is interest in this functionality.

Von Felix (ZBW) an alle: 02:42 PM

Tags are cross-app atm.

Von Martina Schildt an alle: 02:49 PM

collection of use cases for descriptive data on e-resource level:

https://docs.google.com/document/d/11RxHJZXY5YuPiEQNPQsjlO92_N_s4pLjGniotUly8fs/edit#heading=h.e3ek28qiya8b

@Alistair: it would be great if you could demo when ready. Then people can give feedback on their interest. What do you think?

Von Alistair Morrison an alle: 02:55 PM

@martina: Yes, we'd love to give a demo in about a month.

Von UMass Amherst (Five Colleges) an alle: 02:56 PM

This is a huge concern I have

(This is Jack)

Von Virginia Martin an alle: 02:56 PM

Yes, agreed with Jack and Sara that this is a great question

Von Martina Schildt an alle: 02:57 PM

@Alistair: great, just let us know :)

Attendees list

Present	Name	Home Organization
	Abigail Wickes	Duke University Libraries
	Alice Daugherty	University of Alabama
x	Alistair Morrison	Johns Hopkins University Libraries
x	Amanda Cornwell	Johns Hopkins University Libraries
	Andrea Meindl	UB Regensburg
	Ann-Marie Breaux	EBSCO
x	Annika Schröer	UB Leipzig

	Anu Moorthy	Duke
	Anya Arnold	EBSCO
x	Benjamin Ahlborn	SuUB Bremen
	Björn Muschall	UB Leipzig
	Carole Godfrey	EBSCO
	Catherine Tuohy	Emmanuel College
	Charlotte Whitt	Index Data
	Claudia Malzer	ULB Darmstadt, Developer
	Dennis Bridges	EBSCO
x	Dwayne	
	Emma Raub	Cornell
x	Eric Hartnett	Texas A&M University
x	Felix Hemme	ZBW Kiel
	Frances Webb	Cornell, Developer
x	Gill Osguthorpe	UX/UI Designer - K-Int
x	Gisela Weinerth	SUB Hamburg
	Ian Ibbotson	Developer Lead - K-Int
	Jack Mulvaney	UMass
	Jag Goraya	K-Int
x	Janet Ewing	Five Colleges / Mount Holyoke College Library

x	Jenna Lantermann	Five Colleges / Smith College
x	Jessica Harris	Chicago
	Jir Shin	
	Johann Rolschewski	ZDB, Berlin
	Julie Brannon	Duke
x	Kathleen Berry	UMass Amherst
x	Khalilah Gambrell	EBSCO
	Kirstin Kemner-Heek	VZG, Göttingen
	Kristen Wilson	Index Data
x	Kristin Martin	Chicago
	Lars-Hakan Herbertsson	Chalmers
	Laura Wright	Cornell University
	Lindsey Lowry	University of Alabama
	Luca Lanzillo	Sapienza Library System Sapienza University of Rome
	Maike Osters	hbz, Cologne
	Mara Eggherman	EBSCO
	Marie Widigson	Chalmers
x	Mariyam Thorhira	Johns Hopkins University Libraries
	Mark Arnold	Missouri State University

	Mark Deutsch	Duke
	Martina Karlsson	Chalmers
x	Martina Schildt	VZG, Göttingen
x	Martina Tumulla	hbz, Cologne
	Matthieu Bordet	DMCultura, Ravenna, Italy
x	Moritz Horn	VZG, Göttingen
	Nancy Pelis	Five Colleges / Mount Holyoke College Library
x	Nicole Eichenberger (b-ne101)	Stabi Berlin
	Olga Harder	TIB Hannover
x	Owen Stephens	Product Owner - Owen Stephens Consulting
x	Paul Trumble	Amherst
x	Peter Böhm	HeBIS, Frankfurt
x	Peter McCracken	Cornell
	Rüdiger Stratmann	IAI SPK Berlin
	Sabine Howahl	ULB Darmstadt
x	Sabrina Bayer	UB Regensburg
x	Sara Colglazier	Five Colleges / Mount Holyoke College Library
	Scott Stangroom	UMass
	Siobhan McManamon	Five Colleges / Smith College
	Sobha Duvvuri	EBSCO

	Stew MacLehose	University of New England
	Susanne Schuster	BSZ Konstanz
x	Tatjana Clemens	UB Frankfurt
	Theodor Tolstoi	Chalmers, EBSCO
x	Virginia Martin	Duke University Libraries
	Xiaoyan (Yan) Song	NCSU
	Yvonne Mönkediek	SuUB Bremen
x	meobrien	
x	tlp497	