

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> **Password needed: please see link below**

<https://wiki.folio.org/display/COMMUNITY/FOLIO+Meetings+with+Zoom>

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 Oct 7 2020

Convener: Martina S.

Notetaker: Martina S.

Housekeeping:

- **All:** Please edit the attendees list below and indicate when you are there!
- **Next ERM meeting:** Oct 14
- 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 99](#)
2. Amendment preview design - a review and suggestions for improvements - please see homework
3. Agreement preview design - please see homework

Homework

1. Amendment preview design

We're reviewing the Amendment Preview in the Licenses app to address some UX issues. This is how an amendment is currently presented. It is overlaid on top of its parent license. Closing down the amendment preview pane reveals the parent license preview. Three alternative options for the amendment preview are presented below.

Licenses

2 records found

[Actions](#)
[New](#)

Name ^

- ☒ GO test license
- ☐ OS Test License

End of list

X

Test amend

[Actions](#)
[Edit](#)

License information

[GO test license](#)

Type	Status	Start date	End date	Licensor
Local	Active	-	-	Bibsam

Amendment information

Name

Test amend

Status

Active

Start date

-

End date

-

Description

-

[Expand all](#)

Core documents

1

Terms

Supplementary documents

1

Option A

In this option some changes have been applied:

- Added an amendment icon to make it clearer that an amendment is being viewed.
- Applied the standard FOLIO headline style to make the amendment name a large title.
- Moved the parent license details to a separate accordion to demote the parent license details.

 Licenses
3 records found

Actions ▾

 New terms for v2.2: CUP/Cambridge Journals Digital Archive - pre 2019

Actions ▾

Name

 Cambridge Companions Online Orlando datab Sint morbi lobortis sociosqu nisl ac ac tempor Pibus taciti magna vitae porttitor vestibulum

New terms for v2.2: CUP/Cambridge Journals Digital Archive - pre 2019

Status	Start date	End date
Active	2018/11/30	2019/09/03

Description

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

[Expand all](#)

✓ Parent license	1
✓ Core documents	1
✓ Terms	
✓ Agreements affected by the amendment	0
✓ Supplementary information	0

Option B

Here a fixed panel containing the amendment details Status, Start and End date has been introduced. This is consistent with the presentation of licenses.

A simple link to the parent license is displayed, with no other information about the license.

Actions

2019/09/03

🚩 Pibus taciti magna vitae porttitor vestibulum

Description

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

Parent license

Cambridge Companions Online, Orlando database and Shakespeare Survey Online

Expand all

1

0

0

Option C

This option displays the same information as the current amendment preview but rearranged into an alternative display.



Licenses
3 records found

Actions



New terms for v2.2: CUP/Cambridge Journals Digital Archive - pre 2019

Actions

Name

Cambridge Companions Online Orlando data

Sint morbi lobortis sociosqu nisl ac ac tempor

Pibus taciti magna vitae porttitor vestibulum

Status

Active

Start date

2019/01/01

End date

2019/09/03

New terms for v2.2: CUP/Cambridge Journals Digital Archive - pre 2019

Description

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

Parent license

Cambridge Companions Online, Orlando database and Shakespeare Survey Online

Status

Active

Start date

2018/11/30

End date

2019/09/03

Type

Local

Licensor

-

Expand all

✓ Core documents

1

✓ Terms

✓ Agreements affected by the amendment

0

✓ Supplementary information

0

Q1. Is it clear that the record being viewed is an amendment rather than a license? Is the amendment icon needed?

hbz/VZG/ZBW: We had to look multiple times which icon is meant. It seems important to have any indication that the user is looking at the amendment, but we are open to all options. It could be the icon (maybe with a hover text) with inverted colors or some other information.

Virginia (Duke): Adding the icon is an improvement, but none of the mock-ups really clearly say amendment to me. I like that the parent license information has been demoted.

Gill (ERM team): If the word "Amendment" was added to the fixed header would that be enough? E.g.



Kristin (Chicago): I think adding the term "amendment" will make it more obvious.

hbz/VZG/ZBW: Yes, that would be an improvement.

Q2. Is the fixed panel containing Status, Start date and End date needed?

hbz/VZG/ZBW: We do not have a favorite. Both options should be fine, as long as the information is displayed.

Virginia (Duke): I prefer Option A, where the fixed panel is removed.

Kristin (Chicago): not a strong preference, but I like Option C. with the information displayed

Q3. What, if any, details about the license should be displayed on the amendment preview and where?

hbz/VZG/ZBW: We are in favor of not replicating license info in the amendment screen. It should be ok to just display the parent's license name and a link to navigate back to it.

Virginia (Duke): The only parent license detail I'd like to see on the amendment is the Licensor, which is presumably the same for the amendment as for the parent license and otherwise does not display.

Kristin (Chicago): I think what you have is fine. Really, simply having the link to the parent license is probably sufficient, but I do like to see the years the license is active.

Q4. Is a link to the parent license needed or is it ok to just close down the amendment to view the parent license?

hbz/VZG/ZBW: A link to the parent license would be useful.

Virginia (Duke): If there is no other way to navigate to an amendment other than by opening the parent license first, then I think it's okay to just be able to close the amendment. However, I'd still like to see the name of the parent license somewhere, and going ahead and linking it doesn't hurt, so I guess I'm in favor of the parent license link.

Emma (Cornell): A link is useful. Kristin +1

Q5. The accordion "Agreements affected by the amendment" doesn't yet exist. Is this something you would find useful? If it is what would you expect to be displayed in the accordion?

hbz/VZG/ZBW: It seems very useful, especially when a library has created a critical number of records. Then it is not that easy to browse between apps and understand the whole picture of a license agreement over time.

Virginia (Duke): Yes, particularly when the amendment is simply used to add new products to the license, as is common.

Emma (Cornell): Yes. I imagine it as similar to how "Agreements linked to this license" currently displays in a license.

Kristin (Chicago): agree. Yes.

Q6. Do you have any general comments about or suggestions for the amendment preview?

hbz/VZG/ZBW: Would it be possible to make it more clear which, if any, terms have been changed compared with the original license record?

Emma (Cornell): My apologies for being slightly off-topic, but could you explain how the addition of an amendment impacts a license. For example, I recollect you saying that the terms set in an amendment will override those set in the original license. If you do not set new terms in the amendment, will the terms in the license remain the same?

Felix (ZWB): Emma, you are correct. If a term is “not set” in an amendment, then the term will not change in any connected agreements where the amendment is set to “current”. The terms in the license record will always remain the same, regardless of updated or “not set” terms in the amendment. This was illustrated by Owen in one of our earlier ERM Sub Group meetings:

https://docs.google.com/document/d/1RyiATY8sDHbbHYxxLIyoWFf-fS_kZNXMlgsmM5XoZKc/edit

Term	Controlling License	Current Amendment	Resulting terms on Agreement
Walk-in Access	Permitted	<i>not set</i>	Permitted
Include in e-reserves	<i>not set</i>	Permitted	Permitted
Text and data mining	Not permitted	Permitted	Permitted

Chalmers: Has the look of the edit view of Amendments been discussed earlier? Would be great with more clues in that view to show that you are editing an amendment, not the license.

2. Agreement preview design

We're applying a four column layout to the preview pane headers. The current agreement preview pane is shown below.

×

GO test 1

Actions ▾

0

Edit

Period start	Period end	Status	Vendor
10/1/2018	10/1/2019	Closed	Not set

GO test 1

Description

Hac nullam laoreet ullamcorper, nec neque laoreet luctus, iaculis hendrerit donec vivamus augue quam tellus, pulvinar aliquam etiam lorem nibh, lobortis.

Cancellation deadline

-

Renewal priority

For review

Is perpetual

No

Agreement period note

-

Status

Closed

Reason for closure

Rejected

In the mockup below a four column layout has been applied to the agreement preview header. We're aiming to make this section of the screen easier to scan and also for it to take up less vertical space. The Description and Agreement period note fields have been shortened to span two columns and the duplicated Status field has been removed.

✕ Ttorquent hendrerit dui arcu aceque ad wisi sod Actions ▾			
Period start	Period end	Status	Vendor
03/09/2017	02/09/2018	Active	De Gruyter Publishers
Ttorquent hendrerit dui arcu aceque ad wisi sod			
Description Hac nullam laoreet ullamcorper, nec neque laoreet luctus, iaculis hendrerit donec vivamus augue quam tellus, pulvinar aliquam etiam lorem nibh, lobortis.		Agreement period note Pulvinar aliquam etiam lorem nibh, lobortis.	
Cancellation deadline	Is perpetual	Renewal priority	Reason for closure
02/11/2018	No	For review	Rejected

Q1. Is the proposed new layout better or worse than the current one?

hbz/VZG/ZBW: We prefer the new layout, because it is more clearly arranged. Users can see more information at a glance. The deduplication of the status is absolutely fine.

Virginia (Duke): + 1 to hbz/VZB/ZBW

Emma (Cornell): +1

Kristin (chicago): +1

Chalmers: +1'

Jack (UMass): +1

Sara (MHC/Five Colleges): Will Alternative Names still also show? In the examples what is shown the cut off is just above where the Alternative Names are displayed. Alternative names are really important to me. ... I would be fine if they were part of the *preview* section

set closed but then easily opened for display with a click of such a thing like . Right now they just display "open". Otherwise I do like the new layout above --- but also see comments below about Description esp.

Q2. How often do you add a Description or Agreement period note and how much content do you tend to add?

hbz/VZG/ZBW: We add an agreement period note and description for each record, but only a few lines (<10).

Emma (Cornell): We nearly always add a description, which can range from a few key points like PO# and bibID to several sentences. So far we've rarely used the agreement period note field.

Jenna (Smith/Five College): We do not currently use the agreement period note at all, but we use the description for multiple chunks of information (sometimes with a line break, though we could alter our practices). For that reason, while I like the new layout better with the 4 columns in the 2nd row, I'd almost rather see the description still stretch across the columns.

Jack (UMass): I have a description for every agreement UMass has in FOLIO. The description is usually a block of text with reference numbers to our ILS and then some lines of information describing what the agreement is for. I don't always use the Agreement Period but when I do it is maybe a few sentences. I would prefer that the two fields not be next to each other so as not to make the agreement pane longer to scroll through.

Sara (MHC/Five Colleges): I have also not at all or not very often used the Agreement Period Note (yet), but I have used the Description field very similar to how Jenna describes: multiple chunks of info **often with line breaks**. But I could see that in the *preview* the info be displayed truncated. That is, with ellipses after a certain number of characters and then if I wanted to see all then I would just go to the full view.

Q3. Do you have any other comments?

Chalmers: How many characters will be allowed in the description field? What will happen with the current data in this field if its too long? we sometimes have 300-400 characters

Sara (MHC/Five Colleges): Could in the *preview* the info for Description and the Period Note be displayed truncated. That is, with ellipses after a certain number of characters and then if I wanted to see all then I would just go to the full view (see also my comment above, like how would line breaks be handled?).

Minutes

Development progress - [ERM sprint 99](#)

- finalizing modules for Honeysuckle release
- some stories for post Honeysuckle, but mainly no new features
- Gill has reviewed the display of information across Agreements and Licenses App
- if there will be additional time in this sprint, will focus on new options of searching and displaying the platform information in internal KB
- there will be a new search and sort component for it
- work on localizing URLs is pushed over to the next release (Iris)
- major new features in Honeysuckle: ability to have AGLs without attaching a resource to it
- there was a lot of behind the scene works in this release

Amendment preview design - a review and suggestions for improvements - please see homework

- Option A shows amendment information alone
- Option B: has a fixed panel
- Option C shows license information as part of the summary information at the top, not as part of an accordion

- people are invited to add comments to the question of the preferred option
- question: how useful is the fixed panel in any app?

questions 3 and 4:

- include link to the license
- mixed opinions on what information to display; we will stick with the information that is currently displayed
- when we apply new terms in an amendment: if you do not set a term on the amendment, the license term will persist
- if you set a term on the amendment, this will overwrite the term on the license
- would be good to see which impact the terms on the amendment have on the license
- users need to add the amendments manually they have added to a license
- we will come back to the handling of amendments to make it a less manual workflow
- Emma in chat:
- That would be great. We're using both apps, and it was definitely a lot of work to link the agreements and licenses, so duplicating that work if the terms of a license change with an amendment would also be a lot of work.
- list of agreements affected by the amendment will be grouped in current, future, historical
- question by Felix in chat: Does the Term Query Builder also search for Terms in Amendments?
- Owen: not at the moment
- this is something we should look at
- searching and filtering is possible for licenses; it would be good to have the possible to search for amendments as well
- Emma in chat: I think it would also be useful. I've found that I wished I could access contacts and interfaces without going through Organizations, so I imagine the same would happen with having to access Amendments through Licenses.
- it would be good to have a roadmap for licenses and to have more presentation on current implementations
- Felix in chat: I could present if wanted.
- Emma in chat: I can too.
- we will find appointments for the presentations

Agreement preview design - please see homework

- alternative names are important to some users; they display only when there is data in the related field
- overall reaction of Subgroup in comments is very positive about the redesign
- concerns if there is too much information in the description field

- so description field and period note will be below the 4 columns for “Cancellation Deadline”, “Is perpetual”, “Renewal priority” and “Reason for closure” as single column each
- Sara suggests: truncate information in the description field after a specific number of characters; does not want not be limited in her description field; for her it would be sufficient to see the full data in edit screen
- the preview screen is and will stay the full screen; but would it be okay to hide the “more” information behind ellipses
- people can see that as an option
- no need to have an extra accordion for the data (already enough accordions)
- if users are on an agreement and click on an agreement line, another section opens
- Sara suggest to have the description field behave in a similar way
- Owen will look into different ways

Chat

Von Virginia Martin (she/her/hers) an alle: 02:21 PM

be back soon

Von Emma Raub an alle: 02:22 PM

Thank you!

Von Emma Raub an alle: 02:32 PM

That would be great. We're using both apps, and it was definitely a lot of work to link the agreements and licenses, so duplicating that work if the terms of a license change with an amendment would also be a lot of work.

Von Felix (ZBW) an alle: 02:36 PM

Does the Term Query Builder also search for Terms in Amendments?

I can check.

Von Emma Raub an alle: 02:37 PM

I think it would also be useful. I've found that I wished I could access contacts and interfaces without going through Organizations, so I imagine the same would happen with having to access Amendments through Licenses.

Von Virginia Martin (she/her/hers) an alle: 02:38 PM

i'd love to see more implementations

Von Felix (ZBW) an alle: 02:39 PM

I could present if wanted.

Von Emma Raub an alle: 02:39 PM

I can too.

Von Emma Raub an alle: 02:45 PM

Agree with Jack.

Von Felix (ZBW) an alle: 02:50 PM

The description field holds up to 1GB text so I think it should get enough space to display the data inside.

Von Owen Stephens an alle: 02:57 PM

I think technically the limit on the description depends on the database you are using.

Attendees list

Present	Name	Home Organization
	Aaron Neslin	UMass
	Abigail Wickes	Duke University Libraries
x	Alaina Jones	Duke
	Alice Daugherty	University of Alabama
	Alistair Morrison	Johns Hopkins University Libraries
	Amanda Cornwell	Johns Hopkins University Libraries
	Amelia Sutton	UMass
	Andrea Meindl	UB Regensburg
	Ann-Marie Breaux	EBSCO

regrets	Annika Schröer	UB Leipzig
x	Anu Moorthy	Duke
	Anya Arnold	EBSCO
x	Beate Aretz	Stabi Berlin
x	Benjamin Ahlborn	SuUB Bremen
	Björn Muschall	UB Leipzig
	Carole Godfrey	EBSCO
	Catherine Tuohy	Emmanuel College
	Charlotte Whitt	Index Data
x	Claudia Malzer	ULB Darmstadt, Developer
	Dennis Bridges	EBSCO
x	Dwayne Swiger	Missouri State University
x	Emma Raub	Cornell
	Eric Hartnett	Texas A&M University
x	Felix Hemme	ZBW Kiel
	Frances Webb	Cornell, Developer
x	Gill Osguthorpe	UX/UI Designer - K-Int
regrets	Gisela Weinerth	SUB Hamburg
	Heather Thoele	Texas A&M University
	Ian Ibbotson	Developer Lead - K-Int

x	Jack Mulvaney	UMass
	Jag Goraya	K-Int
	Janet Ewing	Five Colleges / Mount Holyoke College Library
	Jenna Lantermann	Five Colleges / Smith College
	Jenna Strawbridge	Duke
x	Jessica Harris	Chicago
	Jir Shin Boey	Missouri State University
	Joe Sikowitz	Fenway Library Organization
	Johann Rolschewski	ZDB, Berlin
x	Julie Brannon	Duke
	Kathleen Berry	UMass Amherst
x	Kathleen Norton	Five Colleges / Mount Holyoke College Library
x	Khalilah Gambrell	EBSCO
	Kirstin Kemner-Heek	VZG, Göttingen
	Kristen Wilson	Index Data
x	Kristin Martin	Chicago
x	Lars-Hakan Herbertsson	Chalmers
	Laura Wright	Cornell University
	Lindsey Lowry	University of Alabama

x	Lindsey Taggert	Missouri State University
	Luca Lanzillo	Sapienza Library System Sapienza University of Rome
	Maike Osters	hbz, Cologne
	Mara Egherman	EBSCO
	Marie Widigson	Chalmers
	Mariyam Thorhira	Johns Hopkins University Libraries
	Mark Arnold	Missouri State University
	Mark Deutsch	Duke
x	Martina Karlsson	Chalmers
x	Martina Schildt	VZG, Göttingen
regrets	Martina Tumulla	hbz, Cologne
	Mary O'Brien	
	Matthieu Bordet	DMCultura, Ravenna, Italy
x	Molly Driscoll	EBSCO
x	Moritz Horn	VZG, Göttingen
x	Nancy Pelis	Five Colleges / Mount Holyoke College Library
x	Norma Flores	
	Olga Harder	TIB Hannover
x	Owen Stephens	Product Owner - Owen Stephens Consulting

x	Paul Trumble	Amherst
	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
x	Sarah Dennis	Texas A&M University
x	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
	Tracy Patton	Missouri State University
x	Virginia Martin	Duke University Libraries
	Xiaoyan (Yan) Song	NCSU
	Yvonne Mönkediek	SuUB Bremen

