

**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/17X3tr6siZH8iS07kGcjAqUNI01zVrJmB>

**Terms and definitions:** [https://docs.google.com/document/d/1vue-mbcULpZivWu69a7nAZEdC-H2yXPQqSblbL\\_0J6U](https://docs.google.com/document/d/1vue-mbcULpZivWu69a7nAZEdC-H2yXPQqSblbL_0J6U)

**Slack Channel:** # erm-team

## Agenda Feb 3rd 2021

Convener: Martina S.

Notetaker: Martina T.

Housekeeping:

- **All:** Please edit the attendees list below and indicate when you are there!
- **Next ERM meeting:** Feb 10
- 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:

- Development progress - [ERM sprint 107 planning](#)
- ERM Implementers Issues from <https://wiki.folio.org/display/RM/ERM+implementers>

We will work through the following topics in order and see how far we get. There are homework questions below that relate to each of these topics - please take a look through and make comments or answer questions

- Should it be possible to have multiple agreement lines for the same resource in the same/single Agreement? (No. 29)
- Agreements/Licenses: How to manage streaming videos (No. 37)
- Agreements: Add new value to "Is perpetual" reference list (No. 36)
- Agreements: Search options (No. 35)

## Homework

No. 29: Currently it is possible to have multiple agreement lines for the same resource (title-package-platform or package) in a single agreement.

This is a deliberate policy as Agreement lines can be active for limited periods of time and link to specific purchase order lines - so this approach means it is possible to record a resource joining and leaving an agreement multiple times (either with the same, or a different purchase order line) over the lifetime of an agreement.

However, it has been noted that this flexibility also enables mistakes to be made, creating duplicate agreement lines for the same resource in the same agreement.

Which of the following statements would you agree with?

- a) It should only be possible to link a resource to a single agreement line within an agreement (i.e. remove the current flexibility)
- b) It should only be possible to link a resource to multiple agreement lines within an agreement if they have different active

from/active to dates

- c) I should see a warning when a resource is linked using multiple agreement lines in a single agreement
- d) None of the above - let us know how you think this should work instead below...

Sara (MHC/5C): C: I should see a warning ...

ZBW/hbz/VZG: we would agree to **answer c**, a warning seems to be the best solution. You never know which use cases and scenarios will occur over time and “Active from/to dates” are not always set. In addition, a search within the “e-resources covered by this agreement” section would be very helpful in order to verify if a specific title is part of this agreement. Starting in Agreements / E-resources tab is too cumbersome for this task.

Emma (Cornell): C, a warning. We’ve definitely created duplicate agreement lines by mistake, and many of our agreement lines don’t have active from/to dates, so B wouldn’t solve the problem.

Jack (UMass): C

Jessica (Chicago): C

Chalmers: C, mostly good with flexibility

No. 36: The current "Is perpetual" flag on an agreement is either "Yes" or "No", or not set. It has been suggested that for some agreements recording a simple Yes/No for this value is not sufficient. Do you agree we should add more values to this list?

If so, please give examples of situations where yes/no is not sufficient and why not.

If you would be against extending the list of values please make this clear below!

Sara (MHC/5C): More values, such as: Unsure, Mix. Unsure when it still needs to be looked into (and so then one can filter on Unsure, when left blank, one cannot filter on blank), and Mix for when the Agreement is not for just one single thing, but various AGLs, some with perpetual access and some not.

ZBW/hbz/VZG: We would like to extend the list: As Sara suggested, “Mix” would be needed (please see use case below). And something like

“Unsure”, “TBD” or “Unclear” would be useful as well, because you could filter on it. So +1 to Sara. An example for a package with mixed PCA conditions that would be managed through an agreement would be Springer DEAL. [1] Given the contract we expect a difference between the total number of titles and the number of titles that include perpetual access. Another example for mixed PCA conditions are multi-year licenses. If you join later, i.e. during the licence period, you will only receive PCA rights from the date of joining.

[1] About project DEAL: “The German Rectors’ Conference was tasked by the Alliance of German Science Organizations to institute Projekt DEAL to negotiate nationwide transformative “publish and read” agreements with the largest commercial publishers of scholarly journals on behalf of all German academic institutions including universities, universities of applied sciences, research institutions, state and regional libraries.”

Emma (Cornell): We definitely have “unsure” and “mix” examples. At the moment we’ve just been skipping checking the “is perpetual” box for those. So far no one has done any filtering where they’ve needed to identify a “mix” etc. agreement, but it could be useful. I guess I’m *unsure...*

Jack (UMass): +1 to above

Julie (Duke) +1 to Emma’s comments above - we plan to skip using the Is perpetual flag unless all components of the agreement are perpetual, which is not always the case.

Chalmers: A “Mix”-value is good. Unsure if we would use “Unsure”.

No. 35: Currently when searching agreements you can do a text search which searches:

- Name
- Alternative name
- Description

You can do phrase searching (by enclosing the phrase in inverted commas), or individual keyword searching (default)

It has been suggested that supporting search on specific fields would be useful. It has also been suggested it would be useful to have more control over exactly how the text search works.

- Focussing only on text fields (fields in the agreement where you can directly enter text) what separate fields or field combinations would you want to be able to search (e.g "Name only", "Name and Alternative Names"?)
- What controls would you want to have on the text search (e.g. "starts with")?

Sara (MHC/5C): just so: Name Only; Name Only & Alternative Names; and then also those two with Starts with ... esp. Name Only. Phrase searching is still also very important--like now with inverted commas/in quotation marks.

ZBW/hbz/VZG: Useful would be the following fields or field combination:

- All,
- Name Only,
- Name + Alternative Name,
- Description Only

As far as controls are concerned we are fine with the current search ("contains" + "phrase"), "starts with" and "equals" would be "nice-to-have" - addition: please see comments

Emma (Cornell): +1

Jack (UMass): +1, though I would prefer Name + Alt Name to be a single search

Jenna (Smith): +1 to the ZBW/hbz/VZG comment. And thank you for working on this!

Chalmers: Current search works for us, Name + Alternative Name most important.

**No. 37: What are the main examples of streaming video services which you have licenses/agreements for and how do those licenses work?**

Streaming video service name	URLs about the service and for lists of content available	How the license works
Kanopy	<a href="https://lib.kanopy.com">https://lib.kanopy.com</a> (? is this the best URL?)	Blanket license for Kanopy Then 1-3 year licenses per "streaming video title" - precise to a day level - so can start any day in the year and end on the day

		before that date 1/2/3 years later
Swank. "Hollywood" films - unique content.	<a href="https://www.swank.com/digital-campus/">https://www.swank.com/digital-campus/</a> (? is this the best URL?)	<p>Semester, annual; individual &amp; packages; FLEX plan (for added confusion)</p> <p>Always pay for the period of access - no access in perpetuity</p> <p>Purchase options:</p> <ul style="list-style-type: none"> <li>● Film-by-film on a time limited basis (semester/annual/multi-year)</li> </ul> <p>Flex plan</p> <ul style="list-style-type: none"> <li>● Plan lasts a period time - this is what you purchase</li> <li>● Number of films in total</li> <li>● You can swap content at any time (e.g. swap one film for another)</li> <li>● e.g. Chicago swap on a semester basis - the films needed for the semester</li> <li>● Driven by course requirements ... course reserve link</li> <li>● MARC records - Chicago remove/add MARC records as titles are swapped</li> </ul> <p>Credits:</p> <ul style="list-style-type: none"> <li>● Buy in advance</li> <li>● As you need films, you use a credit to "buy" the film</li> </ul>

		<p>Umass:</p> <ul style="list-style-type: none"> <li>• 50 films up front with up to 50 swaps</li> </ul> <p>Packages such as "top 100 films"</p>
Film on Demand		3 Year
Alexander Street Press		<p>Varies: 1 Year, Perpetual, Subscription Package, PDA</p> <p>Can purchase individual streaming video</p> <ul style="list-style-type: none"> <li>• Can be different periods of time</li> </ul> <p>Can purchase packages of videos</p> <ul style="list-style-type: none"> <li>• Counselling and Therapy in video (variety of modules)</li> </ul> <p>Subscription collection</p> <ul style="list-style-type: none"> <li>• Can be dynamic in terms of what's in the collection over time (titles may leave of the period of the subscription, and could be added too)</li> </ul> <p>Outright purchase (with perpetual access) vs Subscription</p> <p>Access fees (recurring access fee)</p> <ul style="list-style-type: none"> <li>• e.g. Dance and Video Vol 1 (etc.) collection with \$85 annual fee</li> <li>• MARC records</li> <li>• Collection content is dynamic</li> </ul> <p>PDA - triggered after a number of accesses</p> <ul style="list-style-type: none"> <li>• Possibly separate set of content to</li> </ul>

		<p>their more 'traditional' collections</p> <ul style="list-style-type: none"> <li>• AVON Collection (Academic Videos Online ... )</li> <li>•</li> </ul>
Docuseek2	<a href="https://docuseek2.wiki.zoho.com/About-Docuseek2.html">https://docuseek2.wiki.zoho.com/About-Docuseek2.html</a>	<p>Varies: 1 Year, 3 Year -- using pre-purchased Tokens</p> <p>EBA</p> <ul style="list-style-type: none"> <li>• x hundred films for period</li> <li>• Then were able to keep a number of films based on the usage evidence (although actually down to library to choose)</li> </ul> <p>Some films offered at discount if you already own DVD</p>
Naxos		Subscription Package
Filmfriend	<a href="https://www.filmfriend.de/de/">https://www.filmfriend.de/de/</a>	1 year, package, no perpetual,
AVA VOD Library	<institutionCode>.ava.watch, e.g. <a href="https://hbz.ava.watch/">https://hbz.ava.watch/</a> or <a href="https://voebb.ava.watch/">https://voebb.ava.watch/</a>	1 year, package, no perpetual,
Journal of Visualized Experiments (JoVE)	<a href="https://www.jove.com/">https://www.jove.com/</a>	Purchased collections and "journal" subscriptions
Digitalia	<a href="https://www.digitaliafilmlibrary.com/">https://www.digitaliafilmlibrary.com/</a>	Life of file or subscription, package or individual films



Film Platform	<a href="https://www.filmplatform.net">https://www.filmplatform.net</a>	Varies: 1 year, 3 year, with/without PPR <b>PPR = Public Performance Rights - this is really key information for films</b>  PPR is on a film-by-film/purchase-by-purchase basis
SAGE Video	<a href="http://sk.sagepub.com/video">http://sk.sagepub.com/video</a>	Purchased collections though I think they're available by subscription as well
APA Psyctherapy	<a href="http://psyctherapy.apa.org/">http://psyctherapy.apa.org/</a>	Subscription

## Minutes

- Development progress - [ERM sprint 107 planning](#)
  - Sprint just started
  - Main focus is proof of concept for Dashboard, which can be used for erm and then others
  - attempt on how to display information as widget
  - Several sprints needed to complete the dashboard
  - Work on all the processes like backend to frontend communication – technical development which we will need for the dashboard display
  - From previous sprint:
  - Period start and end dates discussion
  - Keyboard short cuts - already in agreements / Implementing the same in license, ERM comparisons, kb-admin
  - Small relabeling in UI for kb import
  - Hopefully Tags search in e-resource – if there is time in this sprint

Shortcuts in Agreements (taken from <https://issues.folio.org/browse/ERM-1151>):

1. Create new record (focus must be on any element on the Agreements app) - **alt + n**
2. Expand all accordions on detail record (focus must be on any element on the detail record) - **cmd / ctrl + alt + b**
3. Collapse all accordions on detail record (focus must be on any element on the detail record) - **cmd / ctrl + alt + g**
4. Edit selected detail record (focus must be on any element on the detail record) - **cmd / ctrl + alt + e**
5. Save edit / new form changes (focus must be on any element on the detail record) - **cmd / ctrl + s**
6. Go to Search & Filter pane (aka first pane) - **cmd / ctrl + alt + h**

Sara includes addition (the same Sup Prop being added more than once) to No. 25 on Implementers' page

- Should it be possible to have multiple agreement lines for the same resource in the same/single Agreement? (No. 29)
  - Currently flexible
  - in homework 4 options to choose from - C in Homework answers preferred
  - C is chosen over B because active from and active to dates are not set
  - When the agreement lines look identical - What would be the use case for doing it twice? attaching the same resource?
  - What would be the use case for doing it twice?
  - Emma: answers in homework – many Agreement lines won't have active from and to dates
  - Maybe B would be sufficient then
  - Jack: require to use the active to and from in the AG lines, which we haven't done yet
  - Owen: that suggests that you want to add the same resource twice without a timespan – what are the use cases?
  - Emma: no use case right now, preventing me of attaching it twice, that might be sufficient
  - Sara: eHoldings and internal KB is different, in eHoldings I am adding from eHoldings to my Agreement – there is no point where I can set active dates – so at that moment I would need a warning
  - also at the package level and at the individual level
  - activity date is not there to see or to manipulate at that point
  - Owen: eHolding – package and add to agreement – you don't see active start and end date it is not set at the moment – created an agreement line without active dates
  - If you want to add those -> though edit this agreement line
  - what displays in eHoldings would be topic for Khalilah – does not show twice right now, don't know why
  - advantage there should be a warning – this would be topic of eHoldings

- pass information back to eHoldings but we cannot control the behavior of eHoldings
  - to understand if we should stop adding the resource the second time or should we display a warning
  - depending which approach different technical solution must be considered
  - what is the better approach?
  - Either way we need to talk to Khalilah proving the display not all information are shown – information from agreement and not from agreement line right now
  - Laying out and prioritizing
  - Preventing obvious error vs. flexibility?
  - Sara: maybe not adding a package at an agreement line twice, but adding an individual title in a package twice with different dates there could be use cases - different reason for doing it
  - there could be use cases for Agreement with multiple agreement line attached to same resource as well
  - Jack (chat): I am struggling to find a use case for attaching the same KB entity, but I am also reluctant to say we should allow FOLIO to prevent it (getting to my statements in the past about as soon as you can't do it, you'll find a use case) An example would maybe be adding a title once, linking to a PO, adding notes, etc. and then adding it a second time with a new PO and new dates (but you don't want to lose the context of the previous order)
  - Owen: action to start with Khalilah – managing it across the 2 apps to improve the display
  - Still unclear: Are there use cases to attach the same resource twice with blank or active dates?
  - Is there a use case? Blank or same active dates? Exactly the same dates - the B scenario
  - Sara: Subscribed and then stop and subscribed again – attach to the correct POL - But it has a different date
  - Owen: thinking about prioritization and time – if we would be stricter of what you can link then we could avoid adding the same resource twice by accident for those without active dates.
  - We could narrow down the problem with a warning if you had attached a resource with active dates and you now attach by accident the same again.
  - implementing these rules – would deliver a quick change
  - Potential approach from Ian to be further discussed with Owen
- Agreements/Licenses: How to manage streaming videos (No. 37)
    - No. 37 start on discussion today
    - Issue documenting streaming video licenses – how could this be dealt with – homework questions to get information on license details

- Did you already document a streaming video license in Licenses App or Agreement App?
- License per streaming video – How to deal with different start and end dates?
- Example Kanopy – 1 to 3 year licenses per title, start and end date can differ, depending on which day the license started for this title – precise to day level - Feb 1st 2021 to Jan 31st 2022 or e.g. Feb 9th to Feb 8th and so on
- Streaming videos e.g. for course reserves
- Example Swank – per year; as package - 50 films and you change the 50 films during the year
- Question is how to track expirations dates?
- another example using tokens
- three ways to handling this:
  - using the active from and to date in Agreement line
  - using e-resource with description field
  - custom package
- How did you get the information from the content provider?
- please add streaming video license information to the table above
- Agreements: Add new value to "Is perpetual" reference list (No. 36) - postponed
- Agreements: Search options (No. 35) - postponed

## Chat

Von Felix Hemme (ZBW) an alle: 02:08 PM

Is the shortcut function documented? Is it related to tenant Settings / Key bindings?

Jira is ok

for now

Von Jack Mulvaney an alle: 02:11 PM

It should be

It was a Five College issue

Generally the ask came from a place of beefing up the functionality of the Supp. Properties in the Agreements (we aren't using Licenses so I can't speak about the uses there)

Von Emma Raub an alle: 02:20 PM

Ah, gotcha.

Von Jack Mulvaney an alle: 02:35 PM

I am struggling to find a use case for attaching the same KB entity, but I am also reluctant to say we should allow FOLIO to prevent it (getting to my statements in the past about as soon as you can't do it, you'll find a use case)

An example would maybe be adding a title once, linking to a PO, adding notes, etc. and then adding it a second time with a new PO and new dates (but you don't want to lose the context of the previous order)

Von Jack Mulvaney an alle: 02:41 PM

In my example I wouldn't deliberately add without active from/to dates. Example would have 1/1/2018-12/31/2020 and then next would be 1/1/2021-Open

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

Isn't the same true for the internal KB workflow as well? PCIs that are linked to an agreement are not removed from the basket so there is the risk that they get added to the same AGR again. Also I think that we should not set active from/to dates just in order to allow the same resource twice. They should be set only by purpose. So b + c should work

Von Hartnett, Eric J an alle: 02:51 PM

In CORAL, we have an alert set up to let us know 30 days in advance when one of our streaming video title licenses is going to expire so we can reach out to the professor to see if they're going to continue to use the title in their course and we need to renew.

Yes, that's correct

A record is created for each title

Von Peter McCracken an alle: 02:53 PM

we don't have a programmatic way of tracking when access to a movie will expire, but we record the date in the bib record for that movie, so patrons know when it will/might disappear. we track those in a spreadsheet, i think, at present

Von Jack Mulvaney an alle: 02:54 PM

Is this something where we could create Agreement Lines without underlying data from the EKB or the Internal KB? Then you can set active From/To dates and maybe some day the Dashboard could recognize them?

I think this would be an example of when I would loveeeee to be able to connect Inventory to an AGL

Von Kristin Martin (ALCTS) an alle: 02:59 PM

Yes, definitely connecting the Instance would be wonderful!

## Attendees list

Present	Name	Home Organization
	Aaron Neslin	UMass
x	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
x	Annika Schröer	UB Leipzig
	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 Swigert	Missouri State University
x	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
	Heather Thoele	Texas A&M University
x	Ian Ibbotson	Developer Lead - K-Int
x	Jack Mulvaney	UMass
	Jag Goraya	K-Int
x	Janet Ewing	Five Colleges / Mount Holyoke College Library
x	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
	Katrin Brüggemann	UB Leipzig
regrets	Khalilah Gambrell	EBSCO
	Kirstin Kemner-Heek	VZG, Göttingen
	Kristen Wilson	Index Data
x	Kristin Martin	Chicago
	Kyle Banerjee	
x	Lars-Hakan Herbertsson	Chalmers
	Laura Wright	Cornell University
	Lindsey Lowry	University of Alabama
	Lindsey Taggart	Missouri State University
	Luca Lanzillo	Sapienza Library System Sapienza University of Rome
	Maike Osters	hbz, Cologne
x	Mara Eggherman	EBSCO
	Marie Widigson	Chalmers
	Mariyam Thorhira	Johns Hopkins University Libraries
	Marjorie Snyder	



	Mark Arnold	Missouri State University
	Mark Deutsch	Duke
x	Martina Karlsson	Chalmers
x	Martina Schildt	VZG, Göttingen
x	Martina Tumulla	hbz, Cologne
x	Mary O'Brien	
	Matthieu Bordet	DMCultura, Ravenna, Italy
	Molly Driscoll	EBSCO
	Moritz Horn	VZG, Göttingen
x	Nancy Finn	
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
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
x	Sarah Dennis	Texas A&M University
	Scott Stangroom	UMass
	Siobhan McManamon	Five Colleges / Smith College
	Sobha Duvvuri	EBSCO
x	Stew MacLehose	University of New England
	Susanne Schuster	BSZ Konstanz
	Tatjana Clemens	UB Frankfurt
	Theodor Tolstoi	Chalmers, EBSCO
	Tracy Patton	Missouri State University
	Virginia Martin	Duke University Libraries
	Xiaoyan (Yan) Song	NCSU
	Yvonne Mönkediek	SuUB Bremen