

Transferring agreement lines between agreements

Based on a recent addition to the Implementers topics, we would like to explore the situations where agreement lines might 'transfer' in some way between two agreements.

This is a topic that has been discussed previously, and in particular it is worth noting discussions about:

☰ Copying Agreement line information

☰ Agreements and PCA

We would like to revisit this topic based on the implementers topic and discussion in Slack:

We are planning to create agreements partially based on the purchase status, so the ability to move an agreement line from the "EBSCO-subscribed" agreement to "EBSCO-perpetual" agreement, for example, will be a workflow we need to plan for.

Slack discussion: <https://folio-project.slack.com/archives/C9ER2HCRY/p1666365064827839>

In the Slack discussion another scenario was described:

Task: Move Oxford Research Encyclopedias (ORE) to their own agreement

Actions:

- Duplicated an existing "Oxford University Press - eBooks - subscription access" agreement, including agreement lines
- Rename the new ORE agreement
- Remove the extraneous agreement lines, leaving only the ORE agreement lines
- PO linkages remained intact.
- Delete each of the ORE agreement lines from the original agreement ("Oxford University Press - eBooks - subscription access")

We would like to understand as many different scenarios as possible where the ability to transfer lines between an agreement would be helpful - at this stage we are interested in collecting and understanding the scenarios in terms of what causes the change in the real world and what changes you need to make to your agreements as a result.

Please add your scenarios to the table below and we'll discuss them at the next ERM SIG. At this stage in the process it's better for us to have too much information than too little - so if you aren't sure whether a scenario you have falls into this category - include it anyway! We can always filter down the list, but we can't know about things that aren't mentioned :)

	"Real world" change occurring	Changes needed to agreements	Any other relevant information
1	Transfer of a resource from subscribed to perpetual access	Move an existing agreement line for the resource from the "EBSCO subscribed" agreement to the "EBSCO perpetual" agreement	Important to preserve note/PO lines/other info without having to recreate it all on the perpetual agreement
2	Group of previously separate resources gets bundled together during a renewal process	Make previous agreement inactive. New agreement representing the bundled subscription, with an agreement line per resource, pointing to a single POL Agreements linked together for history/tracking purposes	For databases, it might be easier to move agreement lines, to view the full history of the subscription. For journals, if the provider ends up grouping all into a single price, then I could see copying the Agreement lines, since the PO will now be for the bundle. So different scenarios might make more sense to copy, others to move.
3	Bundled resources get split apart (e.g., journal package, or negotiation around different databases causes them to be grouped together or vice versa)	Make previous agreement inactive. New agreement representing the separated subscription, with an agreement line per resource, pointing to their own POL Agreements linked together for history/tracking purposes	For databases, it might be easier to move agreement lines, to view the full history of the subscription. For journals, if the provider ends up grouping all into a single price, then I could see copying the Agreement lines, since the PO will now be for the bundle. So different scenarios might make more sense to copy, others to move.
4	KB Provider releases an updated version of a package and deprecates the existing package.	Existing agreement is maintained and new package is used as the backing from the KB	Important to preserve everything except for the actual package entity coming from eHoldings itself (POLs, Notes Helper App Notes, Text in AGL fields)

[illegible]