

Meeting Time: 8 am EST / **1 pm CET / 12 noon 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

Slack Channel: # erm-team

Agenda March 17th 2021

Convener: Martina S.

Notetaker: Martina T.

Housekeeping:

- **All:** Please edit the attendees list below and indicate when you are there!
- **Next ERM meeting:** March 24th
- 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 110 planning](#)
2. Summary of what has been developed for Iris
3. ERM Implementers Issues from <https://wiki.folio.org/display/RM/ERM+implementers>
 - 12. Ability to search Agreements by POL number
 - 13. Display of number of set terms (licenses) or supplementary properties (agreements)
 - 25. Enhancements for Supplemental Properties in Agreements (SEE HOMEWORK BELOW)
 - 33. E-resources: Change the display behavior when a title is no longer available in a package
 - 38. Agreements/Licenses: Allow sort options for documents

Homework

On the ERM [implementers topics](#) wiki page there is a request to enhance the Supplementary Properties in Agreements. Agreement Supplementary Properties use the same underlying approach as the license Terms, so we can consider enhancements to the Supplementary Properties / Terms together (and if they need to work differently, we need to highlight where they should diverge).

Potential enhancements for the properties/terms include:

1. Ability to have multi-value pick lists for a single property/term
2. Ability to assign multiple values (with associated notes) to a property/term
3. The ability to use the same property/term multiple times on a single agreement/license
4. Support for property/term types for recording dates
5. Enhanced editor functions similar to the Notes Helper app (specifically hyperlinking)

Please consider and respond to the question below:

Does the ability to use the same property multiple times (number 3 above) differ from the ability to assign multiple values to a single property (number 2 above)? If so, what is the difference?

Jack (UMass): I think it depends on license terms versus supp. properties. An ILL term wouldn't need to be repeated if I could choose Fax Only & United States Only, but we currently have a "Resource URL" Supp Prop which I would prefer to repeat multiple times for the main URL, alt-URL for content on a previous platform, etc. than use the value field and then one of the notes fields. It depends on how the Supp prop. is configured and for what purpose it was created.

Felix (ZBW): For *license terms* it would be better to have the ability to assign multiple values to one license term. From a UI perspective I would prefer

```
Term = "Authorized users", Values = "students", "ZBW staff", "IfW staff"
```

about

```
Term = "Authorized users", Value = "students"
```

```
Term = "Authorized users", Value = "ZBW staff"
```

```
Term = "Authorized users", Value = "IfW staff"
```

That was seconded by two of my colleagues from the license department. It is considered easier and faster to record multiple values on one attribute. Assigning labels in Jira works similar. We don't have a use case for Agreements supp. properties where we use a reference value at the moment. When we want to store a URL on an agreement we use the "Supplementary documents" section. I agree that this would be cumbersome in cases like Jack describes where you want to have a lot of URLs recorded and make them searchable with the supp. properties query builder. For us it is sufficient to have them stored without any additional functions:

^ Supplementary documents	
EZB-Anker Sicht Kiel	
Type	Reference
URL	http://ezb.uni-regensburg
EZB-Anker Sicht Hamburg	
Type	Reference
URL	http://ezb.uni-regensburg
Jira-Eintrag	
Type	Reference
URL	http://zbwintern/jira/brow

Emma (Cornell): I can't think of why we would need both, and I would prefer #2 (or #1). #3 it seems like we can essentially do that already if we give a term a new Name like authorizeduser and authorizeduser2. What I would prefer is more like a checkbox where I can use the authorized user term and then select staff and faculty and students for one, and staff / faculty / students / alumni for another, etc.

Where there is a request for "enhanced editor functions" (number 5 above), which fields (related to properties/terms) need to support these enhanced editor functions?

Jack (UMass): Same example as above, we're recording resource URLs in a supp. prop so it would be nice to be able to hyperlink them. Alternatively, since supp. properties drive filters there are some things we'd want a value for (like Authentication Method=Proxy/IP/etc.) but might still want the flexibility of the notes helper app to have ordered lists, etc.

Are there other fields in Agreements or Licenses that would also benefit from such enhanced editor functions?

Jack (UMass): I don't want to say all of them....but we're all using Agreements differently so it might end up being all of them. I can imagine wanting bullets or an ordered list in the description as opposed to a note. Right now UMass would really like them for Supp Properties because that's how

we're recording specific information that needs to be more structured than a note.

Felix (ZBW): We have no acute need but when those enhanced editor functions are introduced we'd think they could help in all the "description" fields: Agreements & Licenses general description at the top, Agreement line and period description.

Do you have additional requirements for properties/terms beyond the five listed above? If so, what are they?

Which would be your top two additional requirements for properties/terms based on the list above and any further requirements added in response to the previous question?

Jack (UMass): #1 and #3 (with 5 coming in extremely close - we're okay with the workaround of copy paste to a browser for hyperlinks for the short term if some other issues were addressed)

Jenna (Smith/Five Colleges): +1 to Jack's prioritization, including 5 coming in a very close 3rd.

Would you be happy to see the same enhancements for both agreement supplementary properties and license terms, or do you see the requirements diverging? If you see the need for divergence, please explain how you believe they should diverge.

Jack (UMass): I think support for all this in agreements would meet a need while making things in licenses more open for additional methods of recording data. The one which is super important for both is the multi-value pick lists, but editor functions may not be as important in licenses for example. Unless total new development happens in agreements to replace supp. properties I'd prefer that these things function the same way if they're the same asset type.

Minutes

- Development progress - [ERM sprint 110 planning](#)
 - Major focus ERM sprint 110 - getting modules released for Iris – backend modules by today and frontend need to be release by the end of the week
 - 2 outstanding bugs for UI Agreements – fix for one of them in testing now
 - Starting work on changes on how we relate between agreement/licenses and organizations - support multiple roles per organization without repeating the organizations
 - And define your own list of roles for the organizations
 - Working on adding description for permissions in ERM modules
 - right now the name of the permission is there and no further information what they enable or not – written description and will be added in codebase – hopefully than to be displayed in the FOLIO UI interface
 - Talking about improving across Folio the display and management of permissions and permissions set
 - For the moment adding those descriptions and document those descriptions in a permission spreadsheet owned by the POs - Tab for each app
 - Permissions spreadsheet:
<https://docs.google.com/spreadsheets/d/1JnlWvi4k-wFatDNimx9fQ375evHSllxtGMookHvs-l/edit?usp=sharing>
 - Owen created default users for reference environment installation (see ERM team slack channel) – Felix added it at a Wiki page <https://wiki.folio.org/display/RM/ERM+user+accounts+for+testing>
 - Peter McC. mentioned on slack – at the moment ERM staff only has permission view organization interfaces but they cannot update them
 - Felix (chat): Our "ERM staff" user has permissions to view, edit, create, delete Interface usernames and Passwords as well.

- Owen will change default users
- Please use those permissions/user accounts when testing – help us spot where permissions are not set right - Demonstration accounts
- Summary of what has been developed for Iris
 - Agreements and Licenses: Iris release Slides: <https://docs.google.com/presentation/d/1pl-gyCmZPo3QGljzdCrJMaPKPNpHW92kPRQa1uTFy1U/edit?usp=sharing>
 - Slide 2: 4 new major features in Iris
 - Slide 3: Set of ux improvements and minor enhancements
 - Slide 4: Non-functional – appear in feature, but there are non-functional and not delivering functionality – work on permissions in both Agreement and Licenses and Improved documentation for develop and a Degree of bug fixing – often tied to new functionality
 - Slide 5: Other work – not part of Iris, but done in this time, but for future releases - Adding Automated test using a new approach
 - PoC Dashboard focused on ERM tasks (will be demonstrated soon to the ERM subgroup)
 - Feed for Title being added and removed in agreement (used for union catalog)
 - Slide 6: Agreements period / date management - Hopefully more intuitive and searchable
 - Slide 7: UXPROD-1759 support adding custom data to URLs for resources in Agreements - support proxy server – for local KB
 - Slide 8: UXPROD-2633 Duplicate license amendments
 - UXPROD-2759: Enhance display of POL information in the Agreement Line display
 - Question: Where is the link displayed? – Agreement line view - Detailed view 3rd pane
 - One of the outstanding bugs – functionality is not working – submitted a fix this morning
 - Slide 9: UXPROD-2811 UX improvements for Agreements R1 2021
 - Now control new settings how many items displayed – was defaulted to a 100 – lead to slow respond times in screen
 - Hide accordions in Agreement view – if there is no content – simplified the view
 - Have not change the order of the accordions – but if you use the notes helper app and some accordions will not displayed due to no content then the note will be higher on the screen
 - Notes / Agreement line always display, because they include - add new button – because otherwise you cannot add Notes/Agreement lines
 - Adding keyboard shortcuts for accessibility and convenience
 - Slide 10: UXPROD-2812: UX improvements for Licenses R1 2021
 - Hide accordions with no content

- UXPROD-2857: UX improvements for ERM Comparison R1 2021
- Slide 11: UXPROD-2813: Agreements – local KB – Enhanced metadata for resources R1 2021
- Local KB search e-resources by tags in local KB
- Suppress from discovery
- UXPROD-2810: Agreements – local KB – Data loading changes and improvements R1 2021
- Slide 12: Sneak peek – Dashboard
- Personal dashboard
- Widgets – you can configure e.g.
- Active agreement past end
- My agreements approaching end
- Active agreements past end
- ERM Implementers Issues from <https://wiki.folio.org/display/RM/ERM+implementers>
 - 12. Ability to search Agreements by POL number
 - Agreement search - Idea Purchase Order Line number in search and find all the agreements that have agreement lines linked to that Purchase Order line
 - Sara: More like a very direct known item search - the POL is often really specific key – over time packages names or collections name are changing - POL/PO number is “hook” and very crucial for moving between difference system and different types of documents
 - Jessica (chat): I agree with Sarah. Being able to search agreements by PO number would be hugely helpful
 - Martina S.: You can search by POL number in orders app and there you should have the link to your agreement line
 - Link from within agreements
 - At the bottom of the POL details view there is the section/accordion Linked agreement lines. Click on the name in the table view then it takes me to the agreement
 - At the moment search by POL - you can in the orders app and link through to the related agreement
 - Sara: If I am in agreements and want to dump my data, will that POL number be there?
 - No, not the human readable number, but the UUID reference for the POL - the link to the UUID is stored
 - POL detailed view – linked agreements – only show up when you link is established
 - If we look at the agreement line and edit that, add a POL line – I get the search for Order lines, provided by orders - showing the search options that are provided by orders app

- In ERM comparisons e.g. similar problem: search for comparison that includes a specific agreement - Select agreement display
- First thought was: Search POL option in search&filter pane – look-up for POL – and then shows the Agreement where it is linked to
- Would that fulfill the requirements described?
- Sara: makes sense – we have the way searching in orders – in orders the POL will show that many Agreement lines are linked to it / Also linking the same POL to different Agreements that will be indicated
- Owen: At the moment the only way of getting that – it lists the agreements twice, because it is attached to two agreement lines in the agreement / One line per agreement line with the name of the agreement
- Sara: Export aspect is still not solved – information contained for export?
- Export right now via LDP
- Sara: Permissions – POL number – known item search – if staff doesn't have permissions in orders, but only agreement – complexity of permissions with different apps
- Owen: Know item search – you know the number you would search for?
- Sara: Communicate with vendor often POL number is used - Most stable number over decades
- Peter: POL number is very important ID
- Jack (chat): We also write out the order number on paper invoices that get scanned for this reason
- Owen will write up story for this: Searching for POL – type in the POL and find the agreement line
- 25. Enhancements for Supplemental Properties in Agreements (postponed)
 - Please look at this week's homework and add your comments

Chat

Von Owen Stephens an alle: 01:08 PM

Permissions spreadsheet: <https://docs.google.com/spreadsheets/d/1IjNlWvi4k-wFatDNimx9fQ375evHSIIxtGMookHvs-l/edit?usp=sharing>

<https://wiki.folio.org/display/RM/ERM+user+accounts+for+testing>

Von Felix Hemme (ZBW) an alle: 01:12 PM

Our "ERM staff" user has permissions to view, edit, create, delete Interface usernames and Passwords as well.

Von Owen Stephens an alle: 01:14 PM

<https://docs.google.com/presentation/d/1pl-gyCmZPo3QGljzdCrJMaPKPNpHW92kPRQa1uTFy1U/edit?usp=sharing>

Von Hartnett, Eric J an alle: 01:34 PM

Really looking forward to the dashboard

Von Jenna L. (she/her) an alle: 01:35 PM

+1

Von Felix Hemme (ZBW) an alle: 01:35 PM

Thanks for the summary!

Von Jessica Harris (she/her) an alle: 01:40 PM

I agree with Sarah. Being able to search agreements by PO number would be hugely helpful

Von Felix Hemme (ZBW) an alle: 01:41 PM

In Orders it will display the AGR lines linked to the order

Von Jack Mulvaney an alle: 01:57 PM

EBSCONet stores our ILS# so I use that as a point of reference between their system and our ILS because often the title they use is not what we have on an older MARC record

Von Peter McCracken an alle: 01:57 PM

We use POLs at Cornell a lot

Yes, for us

Von Jack Mulvaney an alle: 01:58 PM

We also write out the order number on paper invoices that get scanned for this reason

Yes

Attendees list

Present	Name	Home Organization
	Aaron Neslin	UMass
x	Abigail Wickes	Duke University Libraries
	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
	Annika Schröer	UB Leipzig
x	Anu Moorthy	Duke
	Anya Arnold	EBSCO
	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
	Gisela Weinerth	SUB Hamburg
	Heather Thoele	Texas A&M University
	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
	Julie Brannon	Duke
	Kathleen Berry	UMass Amherst
x	Kathleen Norton	Five Colleges / Mount Holyoke College Library
	Katrin Brüggemann	UB Leipzig
	Khalilah Gambrell	EBSCO
	Kirstin Kemner-Heek	VZG, Göttingen
	Kristen Wilson	Index Data
x	Kristin Martin	Chicago
x	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
	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
x	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
	Peter Böhm	HeBIS, Frankfurt
x	Peter McCracken	Cornell
x	Robert Scheier	
	Rüdiger Stratmann	IAI SPK Berlin
	Sabine Howahl	ULB Darmstadt

	Sabrina Bayer	UB Regensburg
x	Sara Colglazier	Five Colleges / Mount Holyoke College Library
x	Sarah Dennis	Texas A&M University
x	Sarah Morgenstern-Einenkel	UB Leipzig
	Scott Stangroom	UMass
	Siobhan McManamon	Five Colleges / Smith College
	Sobha Duvvuri	EBSCO
	Stew MacLehose	University of New England
x	Susanne Schuster	BSZ Konstanz
x	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