ERM documentation needs

App-Specific Documentation

Agreements

- Create an Agreement
  - Add alternative names to an Agreement
  - Add an internal contact
  - Add a controlling license
  - Add a future license
  - Add a historical license
  - Add an external license
  - Add an organization
  - Add an Agreement period to an Agreement record / Add multiple agreement periods
    - Handling Agreement periods (eHoldings / internal local KB)
  - Add a supplementary document to an Agreement record
  - Add supplementary properties to an Agreement record
  - Add a related Agreement to an Agreement record
  - Add Usage Data Provider to an agreement
- Add an Agreement line to an Agreement record
  - eholdings
  - internal KB
  - unlinked Agreement Line
- Add Notes (Helper App) (assign/unassign) (created afterwards - not in Agreement edit mode)
- Edit an Agreement
- Delete an Agreement
- Duplicate an Agreement
- Add Tags to Agreement records (maybe link to Tags documentation, because used FOLIO wide, if there is a separate documentation)
- Export an Agreement
- Export all the e-resources only (internal KB)
- Export an Agreement record with eHoldings resource
- Manage resources joining or leaving a package
- Add a package to an existing Agreement
- View an agreement from an eholdings package record
- View an Agreement Line
  - edit
  - add a PO Line
  - Remove a PO Line
  - delete an Agreement Line
  - assign notes
- Create a new Agreement and attach a package
- Create an Agreement and attach a title in a package
- Delete an Agreement Line
- Duplicate an Agreement
- Cancel an Agreement
- Close an Agreement
- Search and filter for an Agreement
  - name
  - alternative name
  - description
- Search and filter for E-resources (internal KB only)
- Search and filter for Platforms (internal KB only)
- Find agreements that have the status of "In Negotiation"
- Set an Agreement to Status = Close and set Reason for closure
- Localisation of URLs

Licenses

- Create a License
  - add an internal contact
  - add an organization
  - add license terms
  - add a core document
  - add a supplementary document to a License record
- to add later to documentation: add an Agreement // can you link an agreement from licenses?
- Delete a License
- Edit a License
- Duplicate a license
- Terms: create in settings, filter licenses by terms, edit/delete a term
- Export licenses (CSV export)
- Add an amendment
  - Add a core document
  - Add terms
- Edit an amendment
• Delete an amendment
eHoldings?
...
eUsage
...
ERM comparisons
...
Local KB admin
...