# 2020-10-16 Resource Management Meeting Notes

## Date
15 Oct 2020

## Attendees
- Kristin Martin
- Norma Flores
- Jesse Lambertson
- Lloyd Chittenden
- Nancy Pells
- Unknown User (aneslin)
- Julie Brannon
- Martina Tumulla
- Sabrina Bayer
- Tim Whisenant
- Mark Arnold
- Anne Campbell
- Paul Trumble
- Martina Schildt
- Virginia Martin
- Sarah Dennis
- Sabrina Bayer
- Sara Colglazier
- Owen Stephens
- Scott Perry
- Dennis Bridges
- Tracy L Patton
- Martina Karlsson
- Abigail Wickes
- Janet Ewing
- Ann Crowley

## Discussion items

<table>
<thead>
<tr>
<th>Item</th>
<th>Who</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minute taker</td>
<td>Jesse Lambertson</td>
<td></td>
</tr>
<tr>
<td>Announcements/Updates</td>
<td>Kristin Martin</td>
<td>Updates:</td>
</tr>
<tr>
<td>- No PC meeting 2020-10-15</td>
<td></td>
<td>NO PC meeting</td>
</tr>
<tr>
<td>- PC Meeting 2020-10-08</td>
<td></td>
<td>SIG round-robin (look to the left to see the link to notes)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Highlight: Entity Management WG: encompasses authorities but also way more.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Other announcements?</td>
</tr>
<tr>
<td>- POLs and Inventory:</td>
<td>Kristin Martin, Dennis Bridges</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- connection to the POL to the inventory (connects at the instance level)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- But not back form instance to POL</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Makes these types of relationships harder to track and watch</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- UXPROD-1995: Item: Display of POL number, Order status, Order date and Price in the Acquisition accordion</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• how to talk about implementation and for those already live</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Virginia: surprised by this</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• in ERM, it's important to link POLs to agreement lines</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• why does this not work for physical items?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Most libraries are not ranking these two as important</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• seems challenging not to have the backwards link</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If say, receiving, the information will be there, you won't be able to use those numbers in the acquisitions apps, ONLY in inventory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• That order# needs to be attached more closely to the item</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• CAT SEPS mentioned as something to pay attention to closely</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Virginia: Some of this is RM data that lives in Metadata management, so, there is some confusion between this data and which SIG thinks it's the most important for their priorities</td>
</tr>
</tbody>
</table>
Connections between POLs and Inventory: currently connection is between POL and instance, but not back from instance to POL.

Uses cases for wanting multiple POLs attached to the same instance
- ebook upgrades
- multiple subscriptions to print journals
- purchases of ebooks on different platforms
- multiple copies of books purchased over time or for different locations

Displaying Acquisitions Data in Inventory:
- **UXPROD-1995**: Item: Display of POL number, Order status, Order date and Price in the Acquisition accordion
- **UXPROD-1925**: Holdings: Display of POL number, Order status, Order date and Price in the Acquisition accordion

---

CAT SEP: each title follows a series, but is cataloged as per normal separate cataloging standards
- Analytics by volume - by volume, but not by topic
- Series record is currently linked to track analytics
- parent and the item
- series and sets are a “nightmare” 😟
- unnumbered series are treated as a series? (I think I got this)
- Some of the issues have come at this intersection between inventory, receiving, acquisitions and metadata workflows
- Owen Stephens: asking about definitions of use cases?
  - Is the priority from getting from the inventory/item to the order and vice versa?
  - Sara C. YES
  - patron based troubleshooting
    - patron submits an access issue
    - used something then in the BIB record
    - use the Identifier from that BIB to the ERM info, etc,
    - So the search starts with the inventory to the order info (clear example of that flow and need for connections between these)

  from Owen S in chat: (I feel like we should look at harmonising the Inventory <-> POL and Agreement Line <-> POL links. Even if we decide that they should be handled differently ultimately I think we should look at whether they should work in the same way or not!)
  - From an agreements POV, we store order # in agreements
  - If you are going from order to inventory, one can specify the creation of holdings, etc, but does not necessarily mean the order# has then been created to the item created at that point
  - Owen S in chat: (“So when you mush the data in the LDP you should be able to report on that relationship”)
  - Sara adds Order#s in agreements to be able to connect these data points
  - Uses these #s as unique identifiers to make communication with vendors easier
  - Knowing the POL# is just quicker to find and search
  - titles are not ALWAYS unique enough
  - From Owen S in Chat (“The issue here is we come back to how we support cross-app search - which seems to just be a hard topic to move forward :(
    This feels like one of those use cases that might be dealt with if we took the “bento” type approach to cross-app searching
    So you don’t have to decide upfront where you are searching, but you can see the results from across the apps for any search”)
  - Seems important to be able to search using Order information (Dennis Bridges)
  - Also in agreements (as well as in inventory) to add order #s
  - for UChicago, the rich biblio info will be in inventory, but not in acquisitions apps
    - suggests inventory is the place to search for a lot of information
    - multiple items attached to POLs could be a challenge «I think I understood this point»
  - This will cause a problem for the 5 colleges
single user limit vs multi-user limit
- going back to the order to get information? (Dennis)
- subscription ebook collection, holdings for the sub title
- perpetual version of that same title
- say, a title would start as a version migrating from a front list to a package bundled item over time
- would want to use agreement lines to list which titles are on it
- From Owen S in chat ("The issue here is we come back to how we support cross-app search - which seems to just be a hard topic to move forward :("
  This feels like one of those use cases that might be dealt with if we took the "bento" type approach to cross-app searching
  So you don’t have to decide upfront where you are searching, but you can see the results from across the apps for any search
  Semi-rich in Inventory? :)
  I think again there are parallels to Agreement Lines again. At the moment you can associate the POL at the Agreement Line level. This means that if you are using the AL to represent a group of content but
  Sorry - didn’t finish that. But basically AL is the most granular level for a POL at the moment
  That’s deliberate to be honest
  So I have some reservations about going beyond that, but I do obviously want to make sure we serve the use cases you have ")
- from Sara C in chat ("OK, I will change what I was saying so forcefully earlier: I still feel you do not buy the instance--so I would not want the PO or POL associated with it only--but I could see not having items for E-things, but rather only Holdings records, so then the PO or POL should be linked to the Holding record, otherwise the items if there are items")
- titles in one form may not ‘conform’ to cataloging standards
- Making the Modern World (Golden Crest Library)
- using the order # would help link these two different (or more) of what something is called in different contexts
- 3-way links need to be synced over time (and there is not a way to control sync breaking)
- from Owen S in chat ("Some of these problems I’d like to try to solve in the Agreements internal KB
  But I’m also keen to see us be able to link from an Agreements internal KB to a richer description")
- link is a data point, not necessarily a URL
- talk of searching in different apps has a different weight to it
- But folks want to be able to move back abd forth and visually see there is a connection (related agreements accordion)
- Go from the instance, to travel through the POL to agreements
- from Scott P in chat ("Links from/to the POL to all of the parts of inventory (holding, items, instance) is important for reporting so you can aggregate based on attributes in the metadata, holdings data or item data.
  One example is that we store donor information at the item (physical) or holding (electronic).")
- Important for purchases ordered from some higher entity like a state consortium for public access or the like
- from Scott P in chat ("Outside of this area, but pertinent, the donor information drives display to the public to acknowledge the donor (usually because that was a stipulation in creating an endowment")
- associating with donors
- if you put a donor code in the PO, it does not get transferred to Inventory
- ref: UXPROD1607
  * need a better conversation about app interaction when Charlotte is available
- Dennis B sees good use cases from these two UXPRODs 1995 and 1925
- Owen S: wants to make sure the solutions are proper and correct (does not want to start new challenges)
- notes that the 'triangle' would not be added for everything
- But this addition would also need to interact with new apps as they are added (reality is that this is how work is done that links these data points)
- The architecture is a challenge - but this is also a community that is reflected in the decisions made

UXPROD-1925: Holdings: Display of POL number, Order status, Order date and Price in the Acquisition accordion
### Budget Structures and migrating open orders:
- How have you organized your data if you are live or how do you plan to organize your data?

<table>
<thead>
<tr>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Idea is to better understand the challenges in decisions made to know how they will affect rollover and want to make the wisest decisions</td>
</tr>
<tr>
<td>- open v closed</td>
</tr>
<tr>
<td>- how did budget info get migrated over</td>
</tr>
<tr>
<td>- Mt Holy Oke is just starting the budget question (and structure)</td>
</tr>
<tr>
<td>- using expense classes</td>
</tr>
<tr>
<td>- new in FOLIO</td>
</tr>
<tr>
<td>- shifting how funds are set up that were set up in the past with emphasis on print - but wants new structure to better understand the eformats (since that is the largest amount of $ spent now)</td>
</tr>
<tr>
<td>- using groups</td>
</tr>
<tr>
<td>- plan to put together some cases for presentation at at next meeting next week perhaps</td>
</tr>
<tr>
<td>- thunderjet testing and showcasing (being upgraded)</td>
</tr>
<tr>
<td>- environment and team</td>
</tr>
<tr>
<td>- needs upgrading for bugfest coming up</td>
</tr>
</tbody>
</table>

### Action items
- [ ]