2019-09-11 Resource Management Meeting Notes

Date

13 Sep 2019

Attendees

- Kristin Martin
- Ian Ibbotson
- Lars-Håkan Herbertsson
- Theodor Tolstoy
- Nancy Pelis
- Eric Hartnett
- Caroline Schmunck
- Martina Karlsson
- Marie Widigson
- Susan Martin
- Ann Crowley
- Martina Tumulla
- Tim Whisenant
- Maike Osters
- Julie Brannon
- Owen Stephens
- Björn Muschall
- Abigail Wickes
- Nicole Trujillo
- Andrea Meindl
- Kirstin Kemner-Heek
- Kathleen Berry
- Khalilah Gambrell
- Jennifer Eustis
- Sara Colglazier
- Jessica Harris

Discussion items

Item	Who	Notes
Minute taker?	Eric Hartnett and Nicole Trujillo	
Announcements /Updates from the PC • Minutes from Thursday • Further refinement to the MVP /the role of the SIG	Kristin Martin From PC: Desire to get more documentation before there's a technical writer. Deadline for submitting proposal for ER&L is September 23. MVP is mostly completed. Still waiting on final, final responses from institutions. There needs to be some discussions with SIGs to make sure certain features are needed at go-live. If you want to have a conversation, it needs to happen at next weeks meeting - let Kristin know. Final responses need to be submitted by September 20th.	

Chalmers Demos: • ERM: Agreements, Licenses, E-holdings, Organizations • Monographic acquisitions workflows: addresses, templates, and workflow to order, request, receive, fulfill.	Martina Karlsson Lars-Håkan Herbertsson Marie Widigson Ann-Marie Breaux Chalmers uses EDS as their discovery system. They've populated their Knowledgebase eHoldings through EBSCO admin. Currently using 4 apps: Organizations, Agreement, eHoldings, and Licenses. Currently migrating current and historical ERM data (but no financial or assessment data). It is a manual migration. Have migrated about 15% so far. Agreements: Example - they've put all IOP ebooks in one agreement record with agreement lines for each package (ie, Release 1, 2, etc.). They are not using acquisitions so the agreement lines do not connect to POs. Licenses are connected so you can see the terms pulled from the License app. Organization records are also linked. They've added Project Place details (how they currently track workflows) in the Supplementary information section. It's common that they get journal packages through their consortium. They've added their consortia to records as a second organization so they can filter by their organization and quickly see which packages they get through their consortia. Example - in Notes they list all of the subject archives they've purchased from a publisher. Notes can easily be linked to other agreement records. They are using tags for workflows ("todo_task") and to help with filtering. Tags cannot be deleted yet. Licenses: Link to the licenses, they're not uploaded in the system. Terms are being pulled and entered in the system. Organizations: They've created separate vendor records for their different libraries. They've set up separate bill-to/ship-to for the different libraries. Orders: Chalmers will not be using the Orders app for electronic items. Their financials for acquisitions will not be handled through FOLIO (no Finances or Invoices apps). Their bibliographic data is in Libris, the National Library of Sweden's catalog. Libris data is bibframe based but there are a couple of additions. They are not using linked data at this point. There may be a button in Inventory that will allow them to pull records from Libris into the Inventory app. They've created Order templates in the Settings/Orders. For print orders, example: In EDS, a patron sees a book they want but is unavailable. In FOLIO, Organizations Their orders link up to instances and can draw values from both the instance information and template information. Creating a new order for an item automatically creates an item and holdings records for the item. The settings of what should happen in inventory are located in inventory interactions. Libraries can set the number of PO lines and set up a default that requires an order to be approved before it can be opened. Libraries can customize actions so that opening an order triggers actions like informing the vendor (not in Chalmers case) and creates the holdings and item record. Automating sending an order to the vendor would be set up through organizations app; but that is not yet built. GOBI integration with inventory and order module is being worked on. Inventory/Requests: Normally requests are done by barcode number. In this example there's no barcode yet, so they opened the item record, created a new request, put in request information, clicked the new request button, and the request for the student was created. Check In: Checking in will change the status of the item and offer to print a slip. It will also update the status. Preferred location can be prefilled if it is set up for the user. There's still questions on timing of integration; how long does it take to update the item status in EDS? Testing still needs to be done to see what performance issues FOLIO experiences when it has a lot of data in the system. Chalmers is doing stress testing at the moment and also working with developers to identify bugs.	

Action items

- [ ]