ERM implementers

Please add questions and topics here. Topics or questions posted in slack will be added here as well.

ERM implementation topics, questions or issues

#	Topic	Description/ use case	Date added	Provided by *Name, Institution*	Has been discussed in meeting: *Link to agenda/ minutes*	
1	Auto-generate Agreements via import	As an electronic resource librarian with a lot of agreements, I like to set up at least the initial agreement details AND attach resources to it.	2020-12-03	Khalilah Gambrell	[2/12 Meeting minutes]	✅
2	ERM apps ' ref data updates /additions	How best to manage/be notified of updates/additions.	2020-01-14	Khalilah Gambrell	[2/12 Meeting minutes]	✅
3	What data will be migrated to FOLIO	How far back go people with their agreements in FOLIO	2020-01-29	MS based on a comment by Sara Colglazier in the ERM implementers meeting		
4	eholdings + Agreements integration	What Agreement features/functionality is not readily available to a customer using the eholdings app?	2020-02-07	Khalilah Gambrell	[2/26 Meeting minutes]	✅
5	Tags /descriptive data at e-resource level	Ability to attach fine-grained information to any given agreement line / e-resource line to answer questions like: core title vs. non-core title, add statistical codes or subject codes. Collection of use cases.	2020-02-11	Felix Hemme, ZBW Benjamin Ahlborn SuUB		work in progress
6	Multi-value pick-lists in license terms	Ability to record multiple values for pick-list license terms, e.g.: Authorized user groups: staff, students, walk-ins. This is go-live relevant for Leipzig.	2020-02-12	Annika Schröer, UB Leipzig		
7	Alternate Names/Titles for Agreements	Ability to assign multiple names to an agreement record AND search on those names. (Example: Directory of Open Access Journals agreement should also have a field to record "DOAJ" as a searchable title.) We see this as being similar to what has already been done in Organizations. *Edit Annika*: Being able to search for alternate agreement names seems crucial to us, especially since there is no standard/normalized way of naming agreements. In our experience with our old system, there are alternative names for the majority of agreements and many of the colleagues use different forms actively.	2020-02-18	Jack Mulvaney (UMass + Five Colleges) +1 Annika Schröer, UB Leipzig +1 Felix Hemme, ZBW		Done
8	Agreement Lines – expanding information contained in /displayed and able to be recorded under	When an Agreement is not specific to one title or package but is of a (suggested) organizing type for any number of titles/resources each with their own Agreement Lines/POLs etc. then for each the information displayed/provided is currently rather limited. For example, there is no way currently to record Notes at the Agreement Line level, or, to indicate Concurrent User # or Unlimited User information, etc. The inability to record information like this at the Agreement Line level could force us to have to create more Agreements overall to be able to manage resources licensed or purchased at the title or mini-bundle level.	2020-02-18	Sara Colglazier. MHC/Five Colleges		work in progress
9	What additional eholdings + Agreement app integration capabilities do you expect?		2020-02-26	Khalilah Gambrell		work in progress
10	Additional Relationship types needed to optimally make use of the Related Agreements section	In Agreements in the Related Agreements section more different types need to be added and then offered in the dropdown for "Linked agreement's relationship to the agreement being edited". The functionality (automatic bi-way linking) is super cool! but so far the relationship type options are too limited. In the example test-type agreements I talked about in the RM SIG on 2020-02-28, I would have liked to have been able to select 'backfile to'/'backfile of' or 'AAF to'/'Buy In Purchase of' or some such wording etc. I am sure there are other needed relationship types ...	2020-02-28	Sara Colglazier. MHC/Five Colleges	[5/6 Meeting minutes]	✅
11	Make agreement lines independent from connected resources	At the moment, agreement lines can only be created by linking a resource from either eHoldings or the internal KB. It would be very useful for several use cases to be able to create an agreement line without a connected e-resource. *a. the person creating the agreement and linking the POL is not the one responsible for the content (different team, ...), b. the resource cannot be found at the moment and will be linked later on, c. link costs like service charges to the agreement, d. eHoldings users can then create the agreement and link POLs in one step without having to switch apps twice in the process...*	2020-03-04	Annika Schröer, UB Leipzig	[5/12 Meeting minutes]	Q3 2020
12	Ability to search Agreements by POL number	Ability to search by POL number is key need of libraries that purchase through vendors like EBSCO Subscription Service, Harrasowitz, etc.	2020-05-18	Sara Colglazier, Lindsey Lowery, Alice Daugherty		
13	Display of number of set terms (licenses) or supplementary properities (agreements)	Currently the number of set terms/properties does not display in the license/agreement view pane accordions. It would be desirable for users to see how properties are set	2020-06-03	ERM Subgroup		

| 14 | Sort ref values in pick lists in logical order | As is, ref values in pick lists are sorted randomly. As a result, the user has to search for the values in different positions each time, instead of being able to remember where they are. Example:

Order: a, c, b, e, d

Fernleihindikator Lieferweg

Value

Not set
Not set
a - Fernleihe (Ausleihe)
c - Fernleihe (Papierkopie und Ausleihe)
b - Fernleihe (Papierkopie an Endnutzer)
e - Fernleihe (Elektronischer Versand an Endnutzer)
d - keine Fernleihe

Order: b, c, d, a, e

Fernleihindikator Lieferweg

Value

Not set
Not set
b - Fernleihe (Papierkopie an Endnutzer)
c - Fernleihe (Papierkopie und Ausleihe)
d - keine Fernleihe
a - Fernleihe (Ausleihe)
e - Fernleihe (Elektronischer Versand an Endnutzer) | 2020-06-04 | Felix, ZBW | | |
15	Add table to Notes helper app / notes details	I should have mentioned this in our meeting yesterday, but forgot it. It would be helpful if one could also create tables in the "Details" section of the Notes app to store information like: 	Signatur oder PPN	Hefte pro Jahr	letztes aufgenommene Heft	letztes eingecheckte Heft	Bemerkungen
856604968	2	21. 2019, 1	21. 2019, 1	
837955149	1	7.2019	7.2019	
				| This is a screenshot from our internal Wiki. The information is suitable to be maintained in the ERM system. It's about the creation of analytic records in our catalogue.	2020-06-04	Felix, ZBW		

16	Sort "cards" in Agreements and Licenses app in logical or alphabetical order	Cards are sorted differently earch time a user visits a page in both apps. Order: j, e, k, e **⌃ Supplementary documents** **Jira-Eintrag** Type Reference URL http://zbwintern/jira/browse/LM-1689 **EZB-Anker Sicht Kiel** Type Reference URL http://ezb.uni-regensburg.de/searchres.phtml?bibid=ZBW&colors=7&lang=de&jq_type1=ANCHOR&jq_term1=ZBW-1-SAB **Kollektion im Periodika-Bereich** **Note** Hier finden sich detaillierte Informationen zur Kollektion. Type Reference URL http://zbwintern/wiki/display/ACGP/Sabinet **EZB-Anker Sicht Hamburg** Type Reference URL http://ezb.uni-regensburg.de/searchres.phtml?bibid=HWWA&colors=7&lang=de&jq_type1=ANCHOR&jq_term1=ZBW-1-SAB Order: e, k, j, e **⌃ Supplementary documents** **EZB-Anker Sicht Kiel** Type Reference URL http://ezb.uni-regensburg.de/searchres.phtml?bibid=ZBW&colors=7&lang=de&jq_type1=ANCHOR&jq_term1=ZBW-1-SAB **Kollektion im Periodika-Bereich** **Note** Hier finden sich detaillierte Informationen zur Kollektion. Type Reference URL http://zbwintern/wiki/display/ACGP/Sabinet **Jira-Eintrag** Type Reference URL http://zbwintern/jira/browse/LM-1689 **EZB-Anker Sicht Hamburg** Type Reference URL http://ezb.uni-regensburg.de/searchres.phtml?bibid=HWWA&colors=7&lang=de&jq_type1=ANCHOR&jq_term1=ZBW-1-SAB	2020-06-17	Felix, ZBW	7/8 Meeting minutes	
17	License Permissions: Restrict Downloads	Ability to allow some users to search/view license records without having the ability to download documents. Needed as a reasonable effort to protect confidentiality around pricing information which is included in the full text license documents.	2020-06-18	Virginia Martin and Julie Brannon, Duke	7/15 meeting minutes	
18	Licenses: Filter by Organization Role	Ability to filter Licenses by Organization Role. At Duke, we've created some licenses linked to organizations where role = Consortium. We'd like to be able to filter on Organization Role = Consortium, but we first have to filter by a specific Organization and then filter by role within that set of results. Is there another way we could see a list of all licenses that are linked to any organization with a role = Consortium?	2020-07-15	Virginia Martin and Julie Brannon, Duke	planned for 7/29	

| 19 | Licenses: Filter by Independent /Professional School Library | This topic was touched on during the 2020.07.29 ERM Subgroup meeting . It seems that several institutions share the need to distinguish license records based on internal libraries such as main library, medical school library, law library, business school library since each of those entities may manage independent license agreements.

At Duke, we decided to use the License Type for this, so we used Settings to create a value to represent each library.

Search & filter

🔍

Search

⊗ Reset all

∧ Status ⊗
☐ In negotiation
☐ Not yet active
☑ Active
☐ Rejected
☐ Expired

∧ Type ⊗
☑ Medical Center Library
☐ Goodson Law Library
☐ Duke University Libraries
☐ Ford Library

∧ Organizations
Select an organization ▼

∨ Organization role
∨ Tags
∨ Terms

An alternative approach would have been to create an organization record for each of our libraries and assign them to the license with a role = 'Licensee', but we wanted the easier filtering offered by License Type (if we use Organization we have to click the Org filter box to find "Law Library"), we preferred not to create an Organization to represent our libraries, and didn't see a clear need for the "License Type" field.

Owen asked during the 2020.07.29 meeting about the possibility of referencing 'Location' as setup in Settings/Tenant/Location; however, that wouldn't be helpful in Duke's case and could be problematic for other institutions as well depending on how they plan to structure loan rules.

The Settings/Tenant/Location setup at Duke will likely have a hierarchy like this (not final yet, though) which was designed for loan rules:

Institution = 'Duke'

Campus = 'Professional School'

Library = 'Ford', 'Medical', 'Law', 'Divinity'

Another branch of the tree would represent our main library (DUL) which has several sublibraries, but they don't manage independent license agreements

Institution = 'Duke'

Campus = 'DUL'

Library = 'LSC', 'BES', 'Perkins', 'Music', 'Marine', 'Lilly', 'Rubenstein', and so on.

So, if this structure were hooked into Licenses/agreements we couldn't just point to the Campus (since we'd only be able to differentiate between 'DUL' and "Professional School") and we couldn't use Library since it breaks out 20 different values for DUL.

How are other institutions thinking about handling this use case? Thanks! | 2020-08-04 | Virginia Martin and Julie Brannon, Duke | | |