



FOLIO/ERM

FOLIO Days Bremen - Progress Update and Concept
Validation

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Aims

Use this session to

- Remind you of the problem and proposed solution / concept
- DEMO
- Ask questions and invite follow up to
 - correct errors,
 - uncover omissions and
 - consider new opportunities

In Short:

We really want your feedback

Reminder : What's the problem?

Problems facing ERM user community / Environment

- Fragmentation
 - increasing pathways to content and content providers
- Consolidation (KB providers and Content providers)
 - Few high powered players creating larger and larger aggregations
- Polarisation and Lock-In
 - Are we less free to pick-and-mix content providers and solutions due to KB consolidation
- **Complexity**
 - 10m title ebook packages - how can you possibly track what you should have access to
 - Comparison and Value, Metrics
 - Lifecycle and Calendar events - Renewals and Reviews
 - Integration with, and support for tracking Patron and Demand Driven Acquisitions
- Changing Models, changing roles of KB providers
 - Content provider exports, Quality / Extent of KB data

Problems v2

- **Complexity**
 - KBs, Content Providers, Licenses, Usage Data, Brief Metadata, Metadata Quality

What we've understood to be important
so far.....

“Impartiality and Independence” or “I’m a nervous flyer” or “The KB isn’t the ERM”

- ERM is about having our own dependable “System of record” that cannot be changed except by the institution.
 - Or at least clearly understanding what can be changed when and by whom
 - Against a backdrop of consolidation
 - Having an immutable record that we can all agree upon

Integration - Links to other key Apps and Systems

- Acquisitions
 - For tracking POs, trials, commercials
- Finance
 - For cost per use
- Discovery
 - For end users
- Usage Data
 - For analysis, selection and renewal
- Licenses
 - To work out what we can do with content

Accuracy / Level of Detail and Persistence

- Ability to record package purchases “Academic Search Complete”
- Ability to record single titles
- Ability to record coverage customisations
- Ability to track changes and detect changes over time
- Control over history

License Integration

- License Interpretation
 - Explain what users can do with the content in user-meaningful terms
 - Coursepacks, ILL
- License properties
 - Our approach to user-meaningful terms
- Integration with Discovery
 - So end users can understand

Fundamental Vision

Provide an immutable “System of record” - Supporting and Recording what was bought, by whom, possibly for what reasons, under what conditions and for how long. Do this to support retrospective evaluation and problem solving.

ERM Solution Concepts

- KnowledgeBase
 - Packages or Bundles of (e)Resources provided by Vendors on Platforms
 - Multiple KB sources
 - Consistent Behaviour
- Agreements
 - Institutions can negotiate agreements that cover entire packages, subsets or individual titles, and change the contents of those agreements over time
- Agreements contain Entitlements (AgreementLineItems)
 - Entitlements can expire, but are not deleted
- Agreements relate any list of content with a license and links to the finance/orders subsystem and the eUsage system.
- In Short - Agreements are our aggregation point for a particular collection.

DEMO

What we think is important next...

Package Comparison

- In the purchasing workflow - ability to compare an existing agreement with possible replacement candidates
- Metrics for overlap and replacement costs
- Deep Integration with usage statistics
 - Not just report download, but combining agreement content resources with usage data

Discovery Systems Integration

- The ability to push active content lists from ERM agreements and entitlements into arbitrary down-stream systems.
- Initially KB levels of detail, consider later links to rich records
- Deltas - content activated/deactivated since last update
 - Important for independence and decoupling tightly integrated workflows

Wider FOLIO Context

- Integration was a Key Driver
- Exploit the FOLIO architecture - pluggable components
 - We're blazing a bit of a trail here with GOKb integration
- eHoldings, GOKb other integrations

Summary

- Rapid progress over the past 12 months - Project (App Interaction), Technical(Patterns, Tools) and Administrative (New Scrum Master)
- We're not being rushed, but have pressures to support the rollout of FOLIO to early adopters who are keen to see ERM / agreements functionality.
- ***INNOVATION - Microservices are not a Panacea - App Interaction, Microservice Orchestration***
- Working KB Integration
- Working Agreements, Licenses
- ERM team Driving App-Interaction forwards, from a project and a technical perspective

Questions
