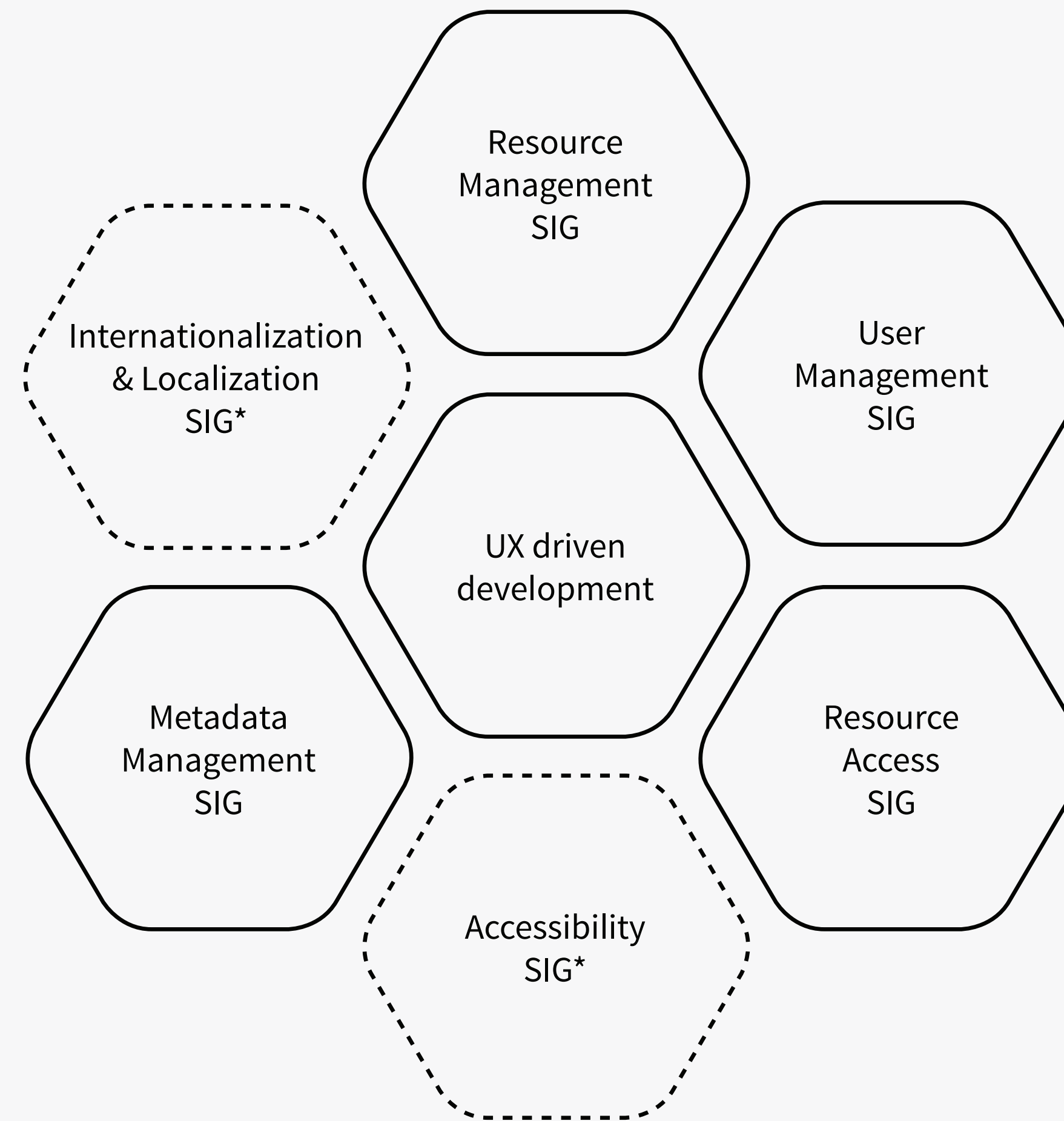


Resource management workshop, Boston, Nov. 29–30, 2016

Turbo Recap

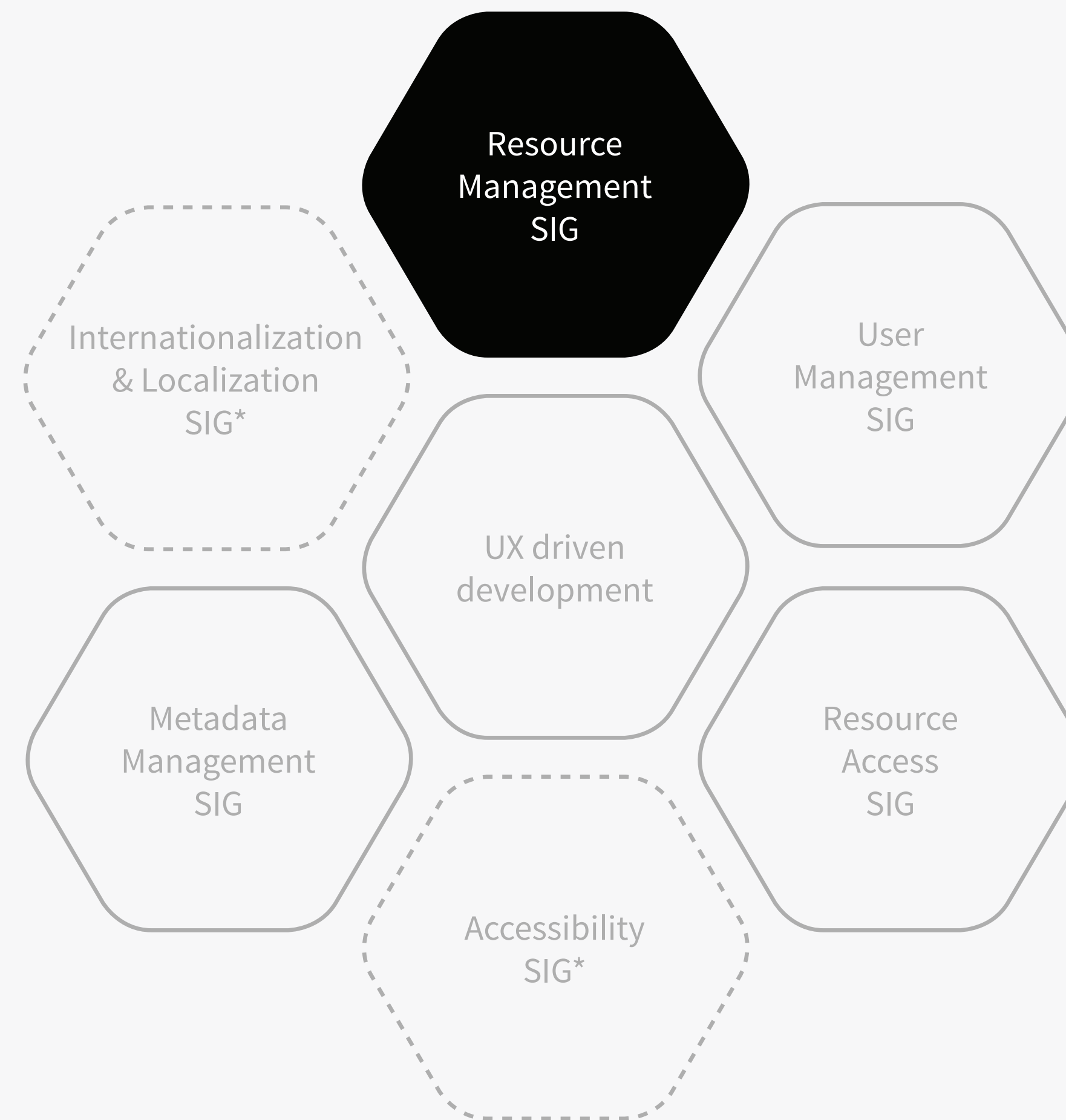
Filip Jakobsen, UX & interaction designer · Dec. 13, 2016

FOLIO's UX and functionality is based on input from expert practitioners
Each area of expertise is represented by a Special Interest Group (SIG)



* Potential future SIGs

The Resource Management (RM) SIG recently had a workshop to begin defining the optimal way for FOLIO to support RM tasks

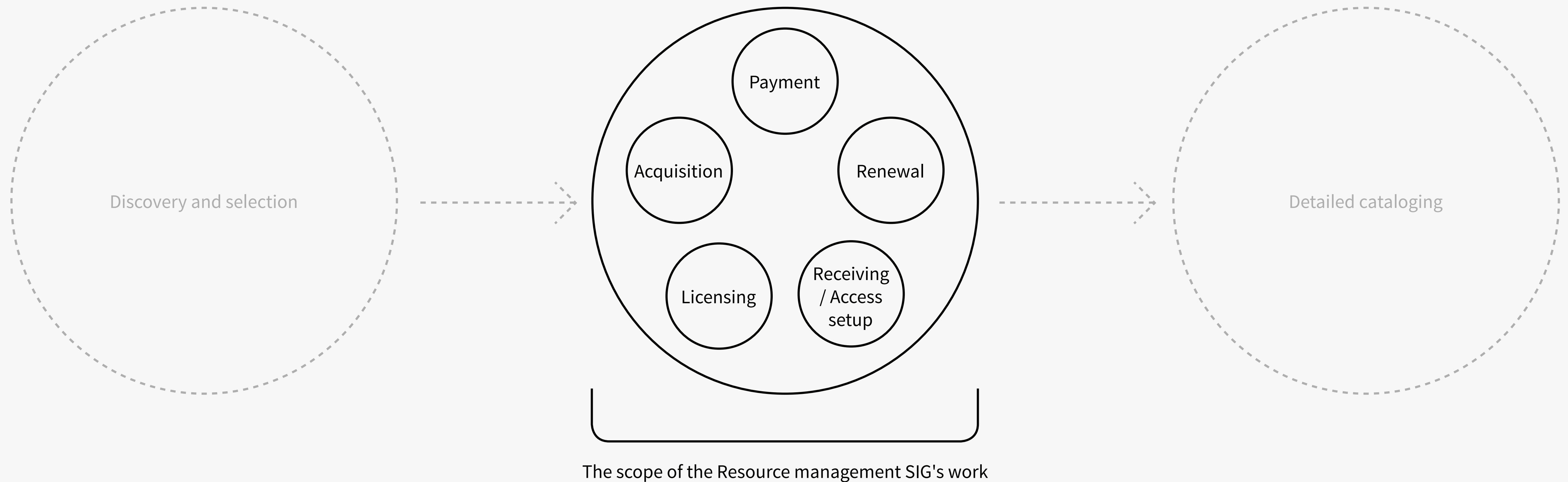


* Potential future SIGs

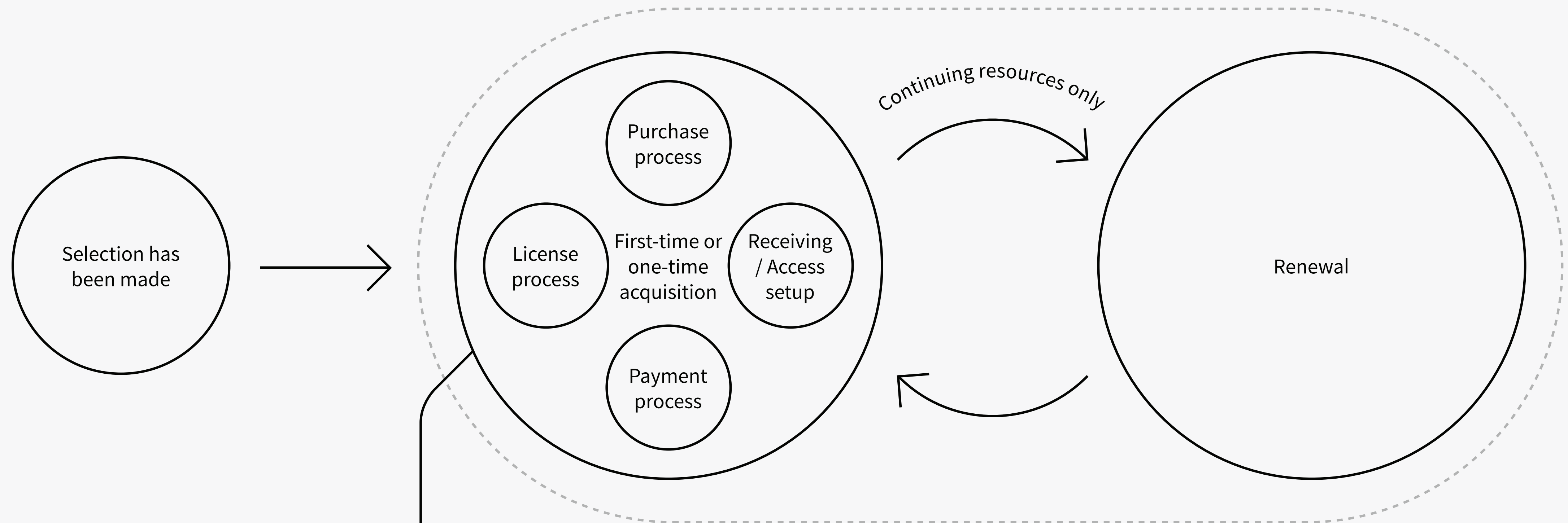
Workflows and general learnings

Conversation starters: not immutable conclusions

The scope of the Resource Management SIG's work should be limited
The RM SIG should not work with selection, nor with detailed cataloging



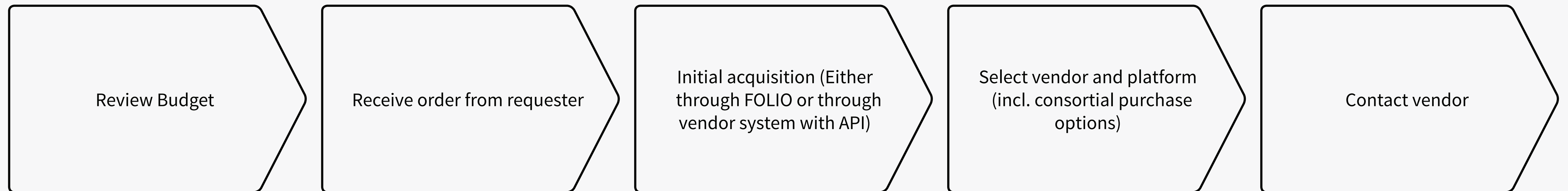
One-time acquisition workflows are generally the same for all resources
Continuing resources need a different workflow for the renewal process



These workflows are generally the same for all resource types (i.e. monographs, databases, journals, etc.), with minor variations for the workflow details for:

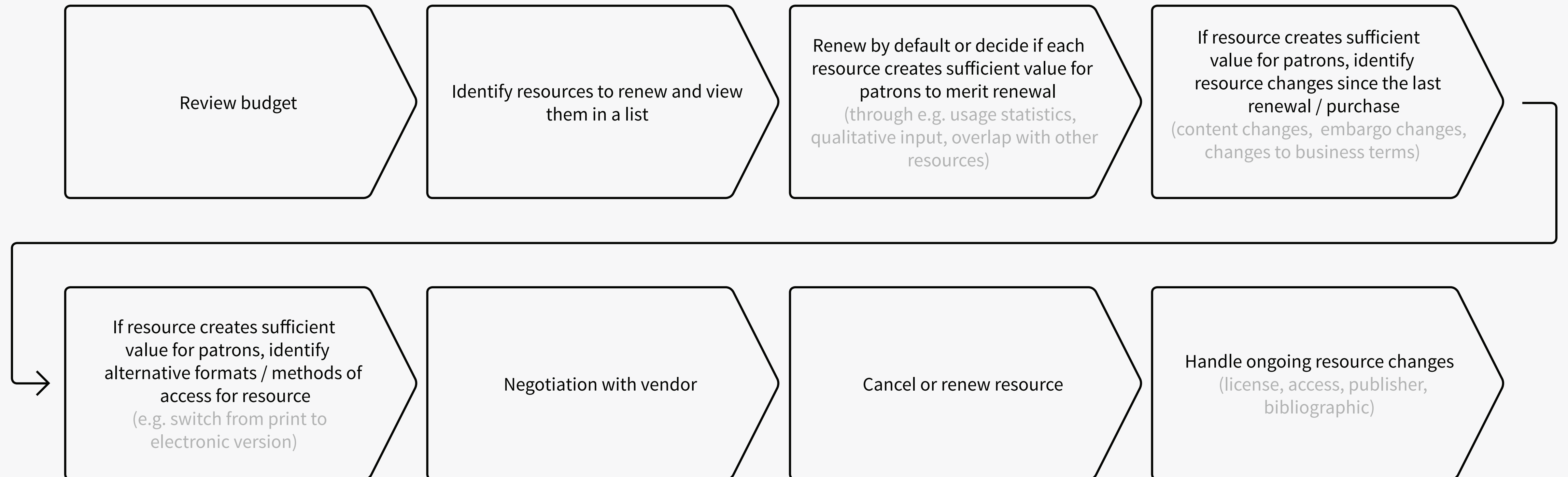
- Tangible resources vs Electronic resources
- Manual selection of resources vs DDA / EBA

General, high level workflow for one-time (incl. first-time) acquisitions
Each step contains within it a number of functions not covered here



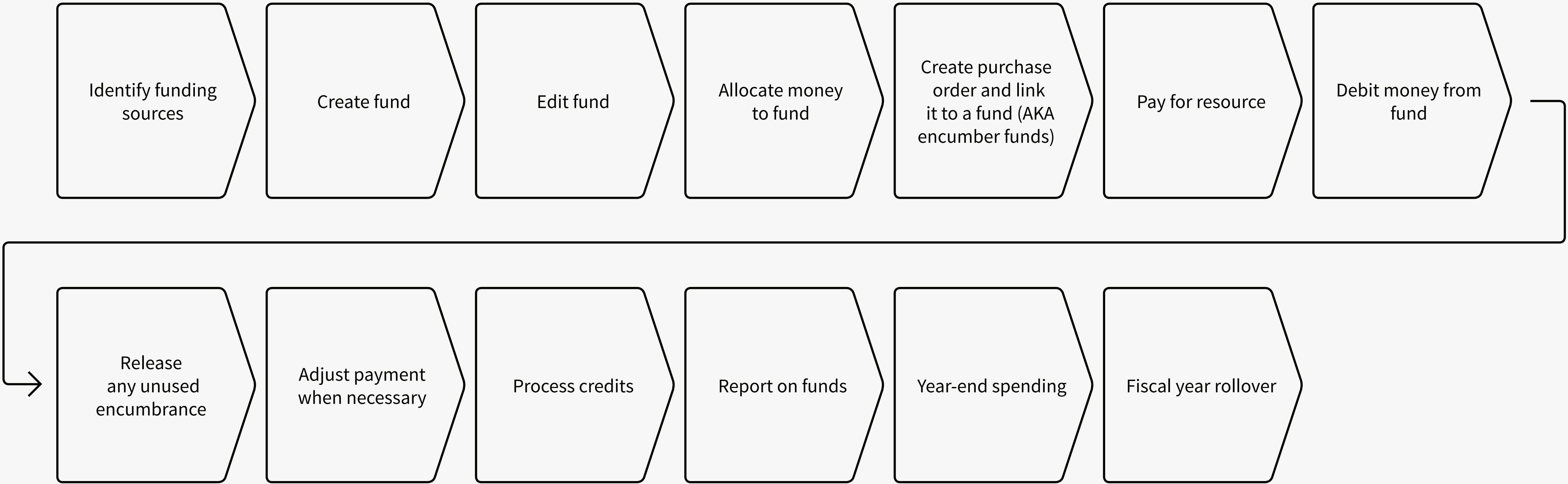
General, high level workflow for renewing a resource

Each step contains within it a number of functions not covered here



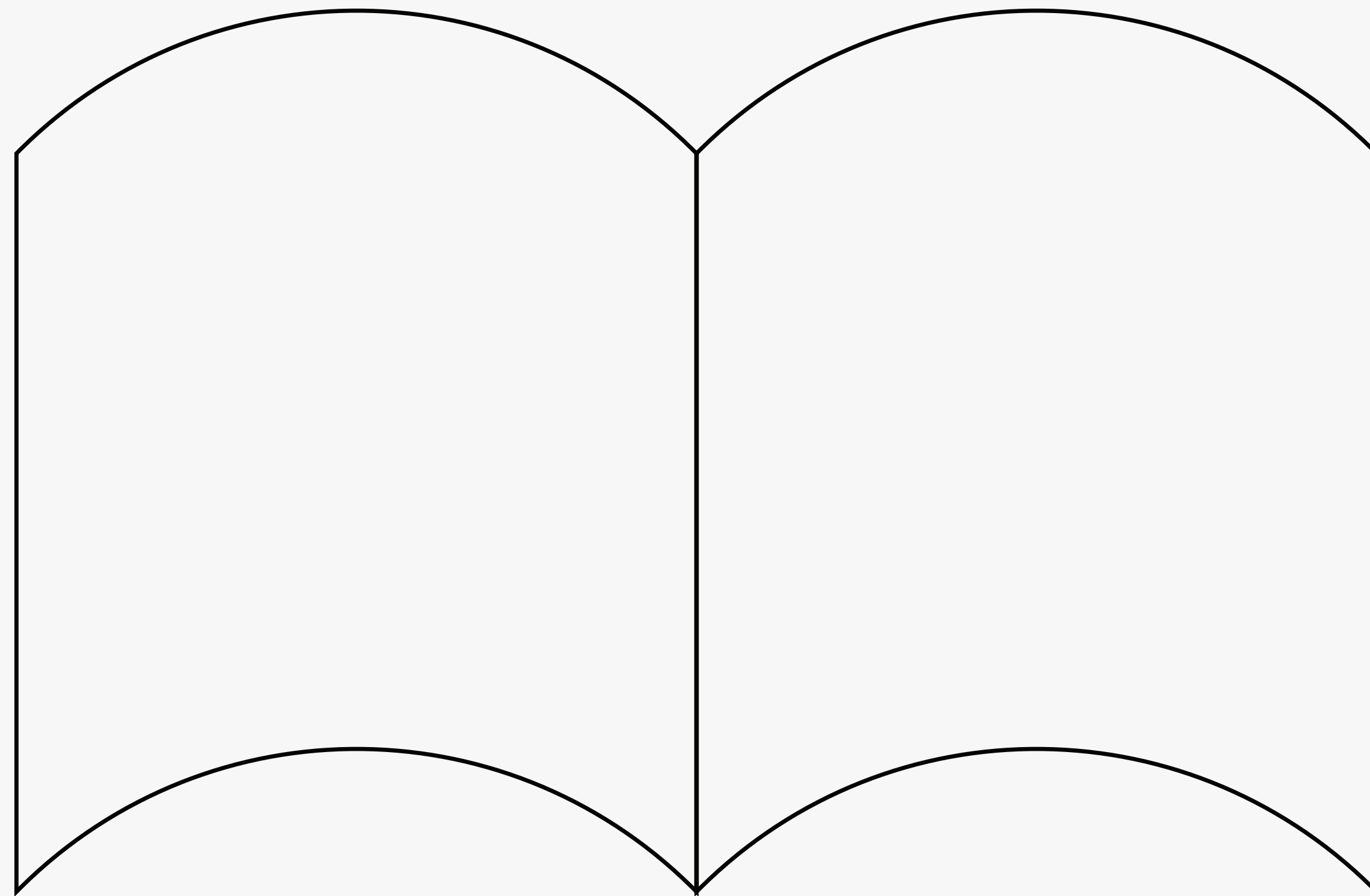
FOLIO should have a basic, but integrated, financial management system

It should not be extensive, but needs to support the following tasks



FOLIO needs to support serials checkin

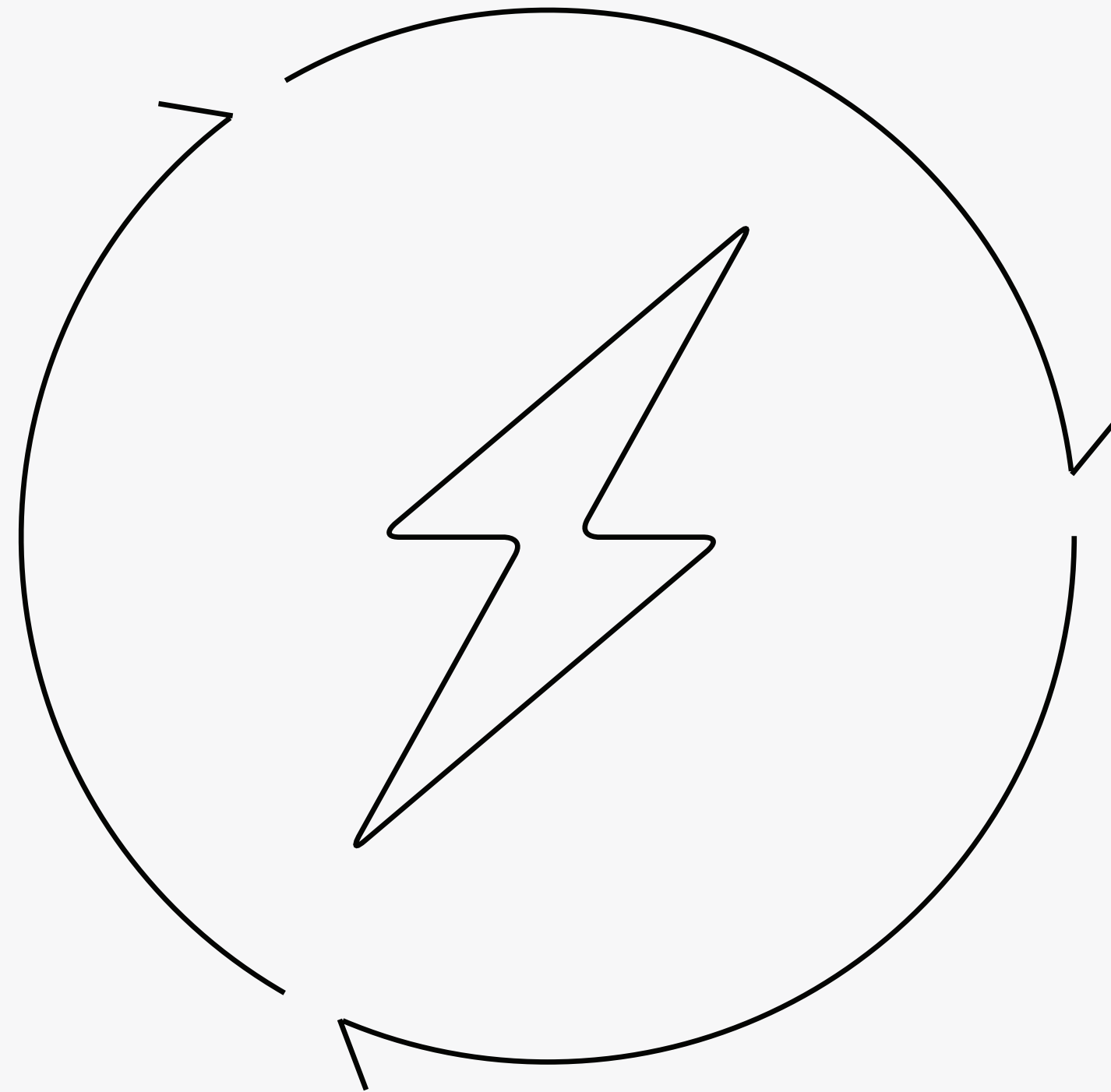
A workflow will be documented soon



Feature ideas

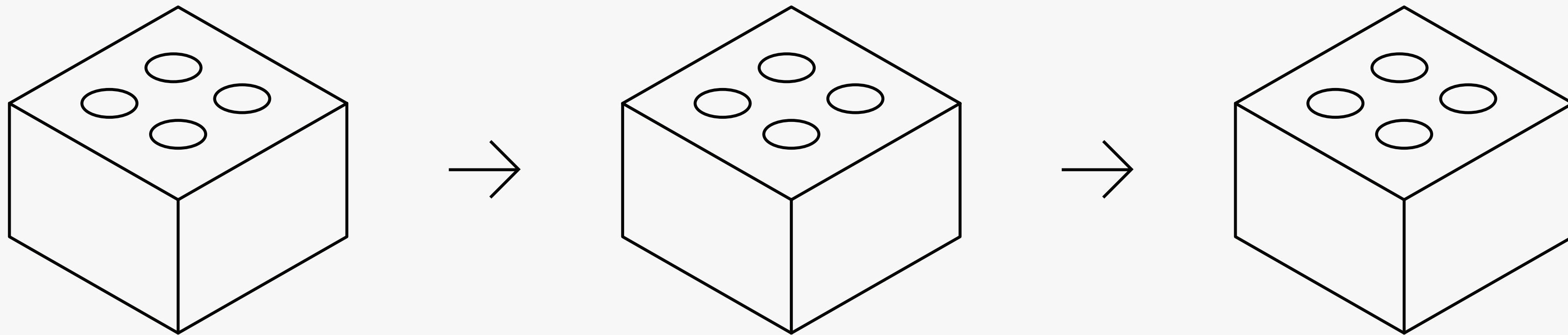
Ideas that came up while discussing and defining RM at the workshop

Feature idea: Unified system and/or great integration with other systems
Using disparate tools in the same RM workflow seriously lowers efficiency

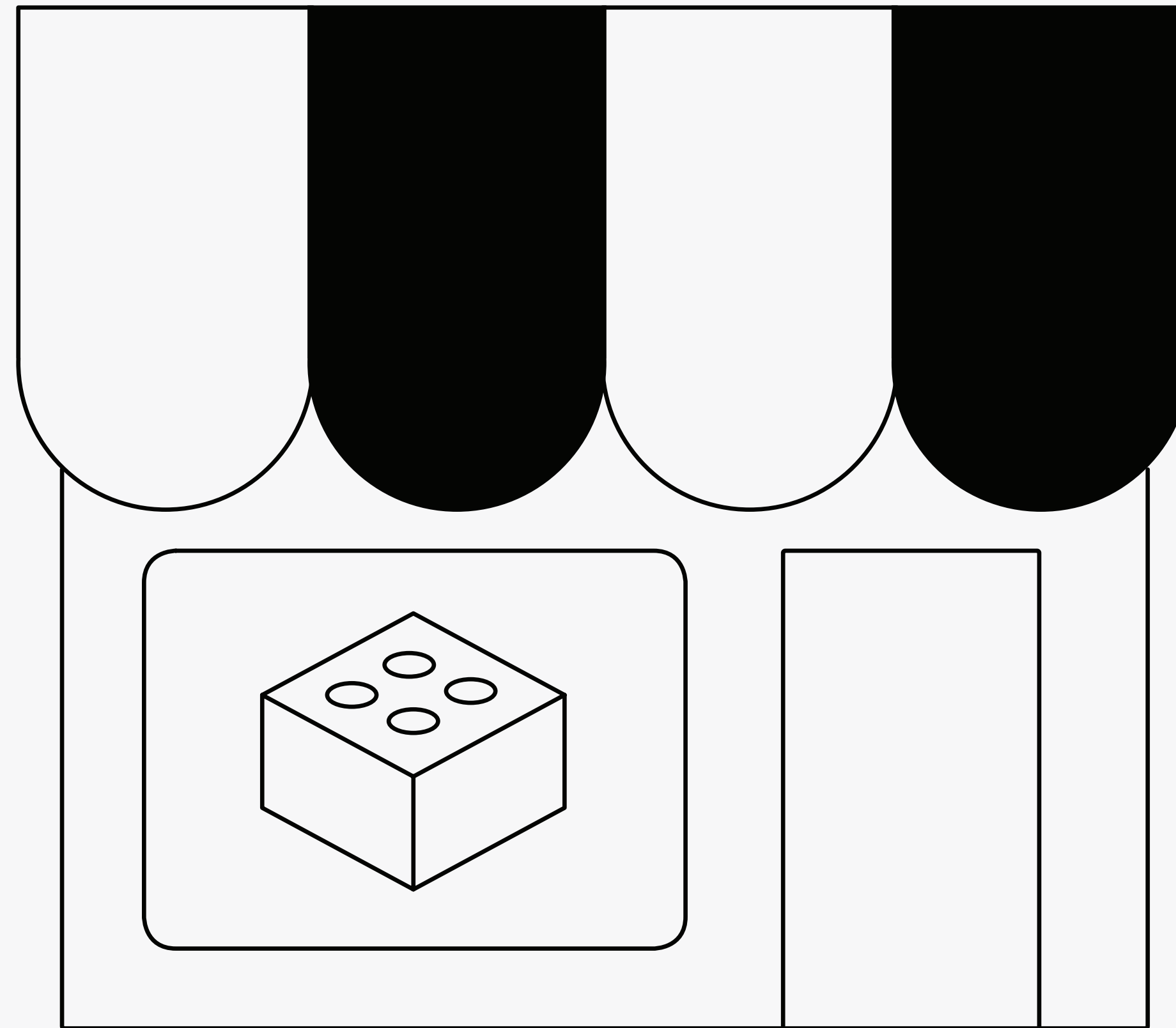


Feature idea: "Building block" workflow engine to ensure flexibility

Each organization has a different workflow

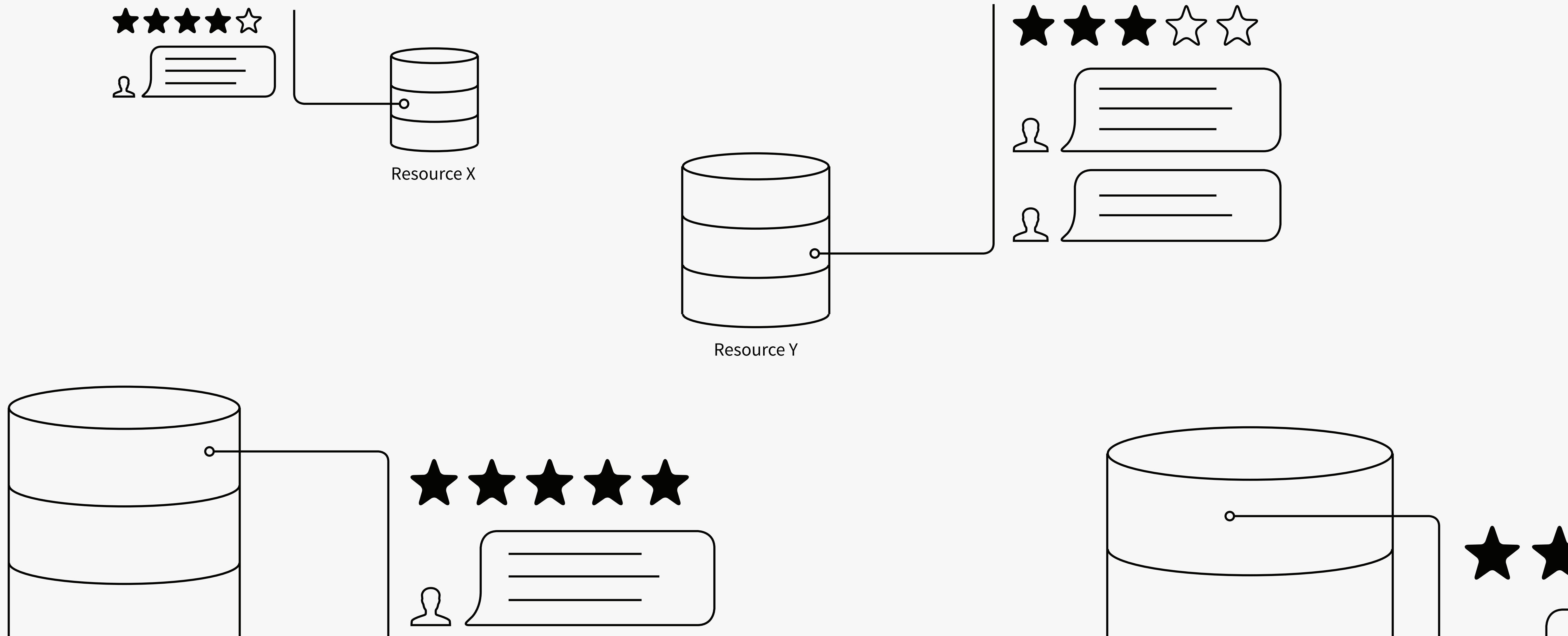


Feature idea: Marketplace for workflows to reduce duplication of effort
E.g. when dealing with workflows specific to a vendor or resource



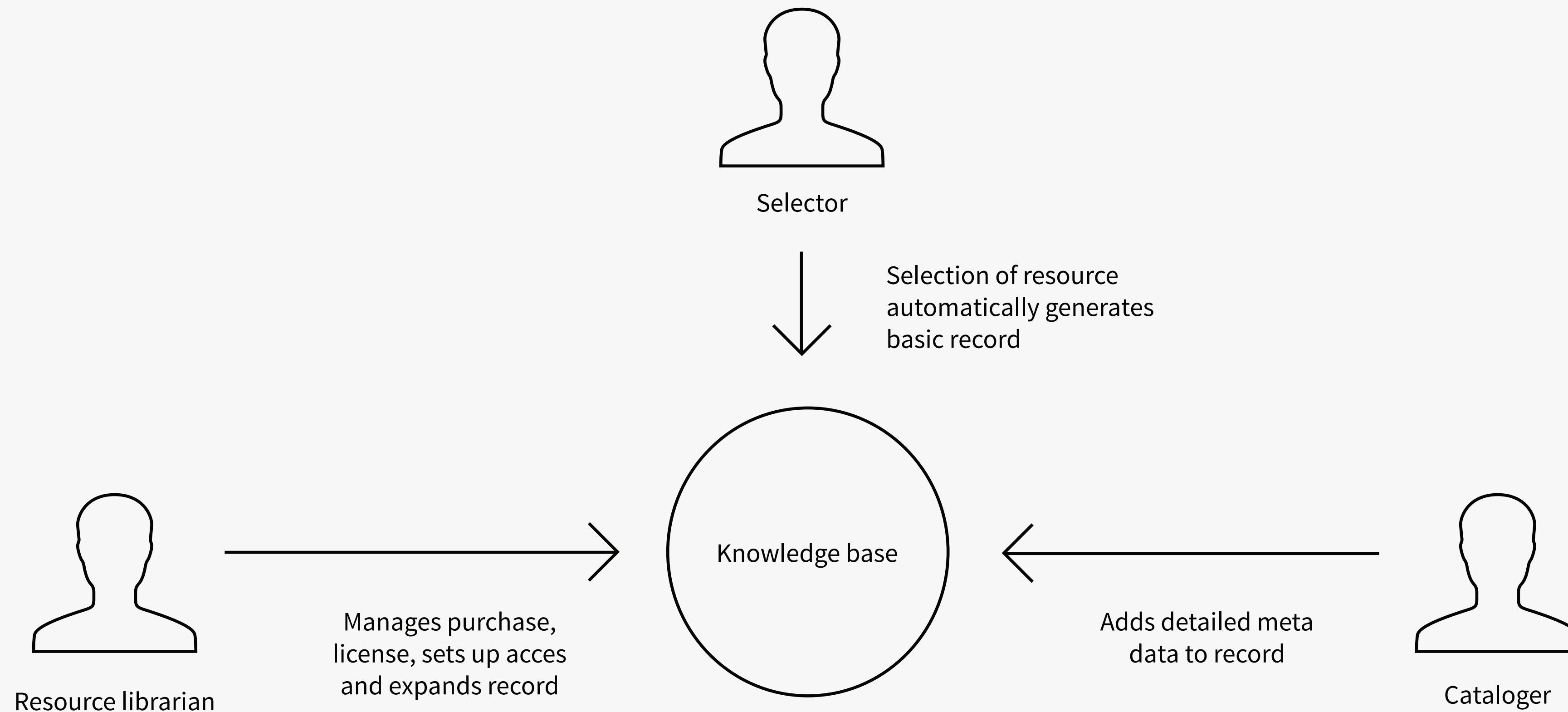
Feature idea: Integrated knowledge sharing platform for resource reviews

Letting staff share helpful tips about resources, across organizations



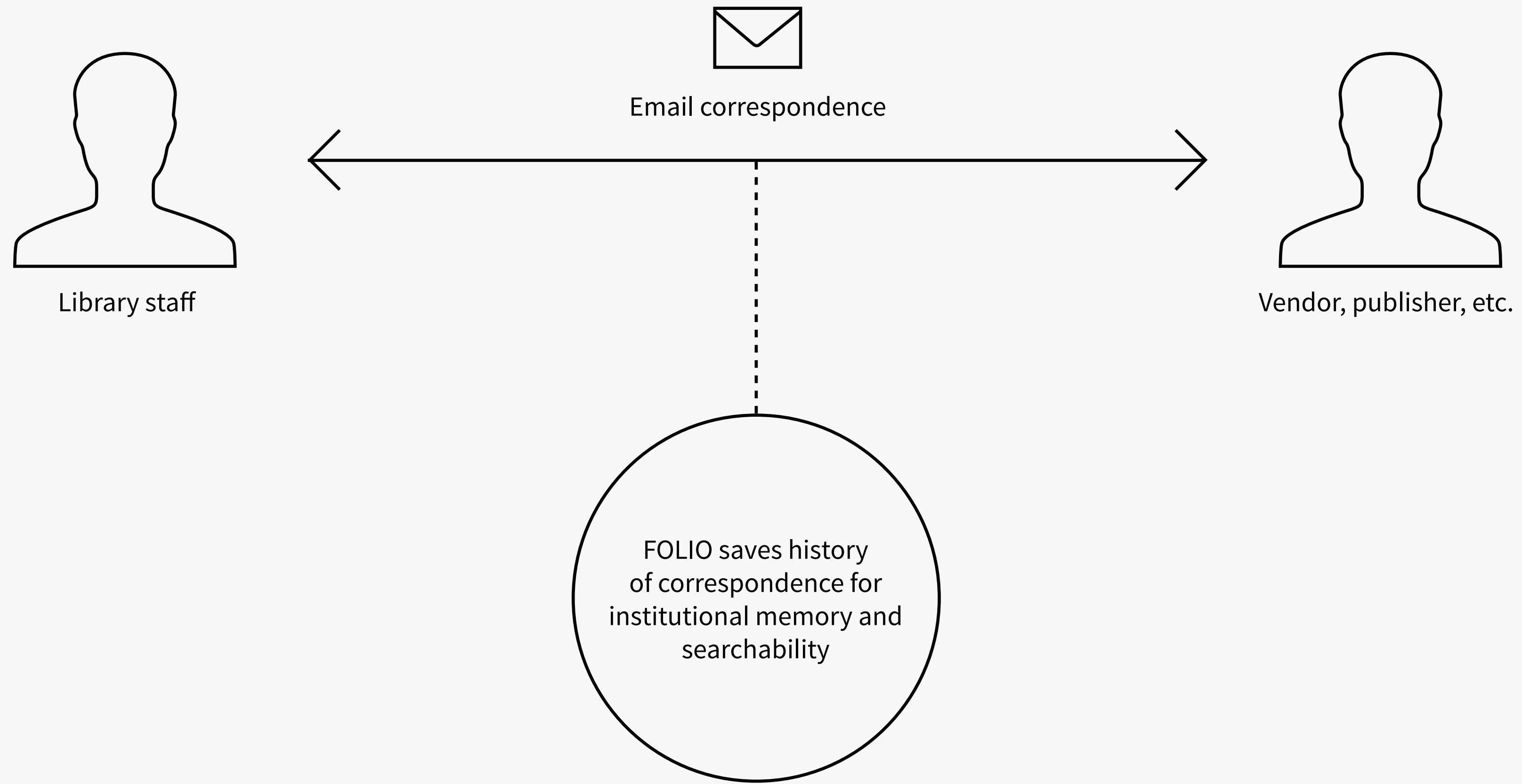
Feature idea: Integrating selection with a KB

Automatically creating records inside the system upon selection

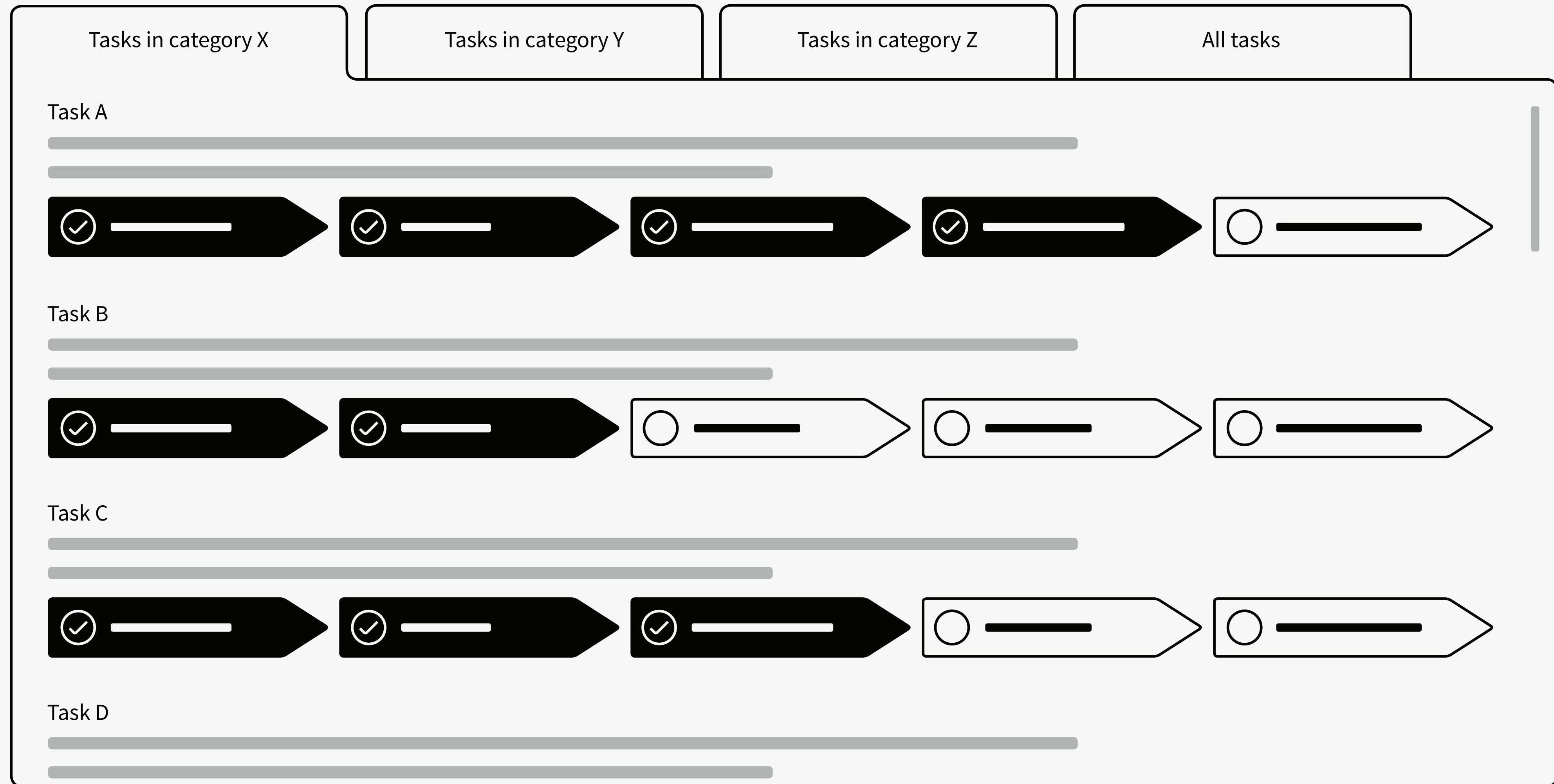


Feature idea: Email integration for RM workflows

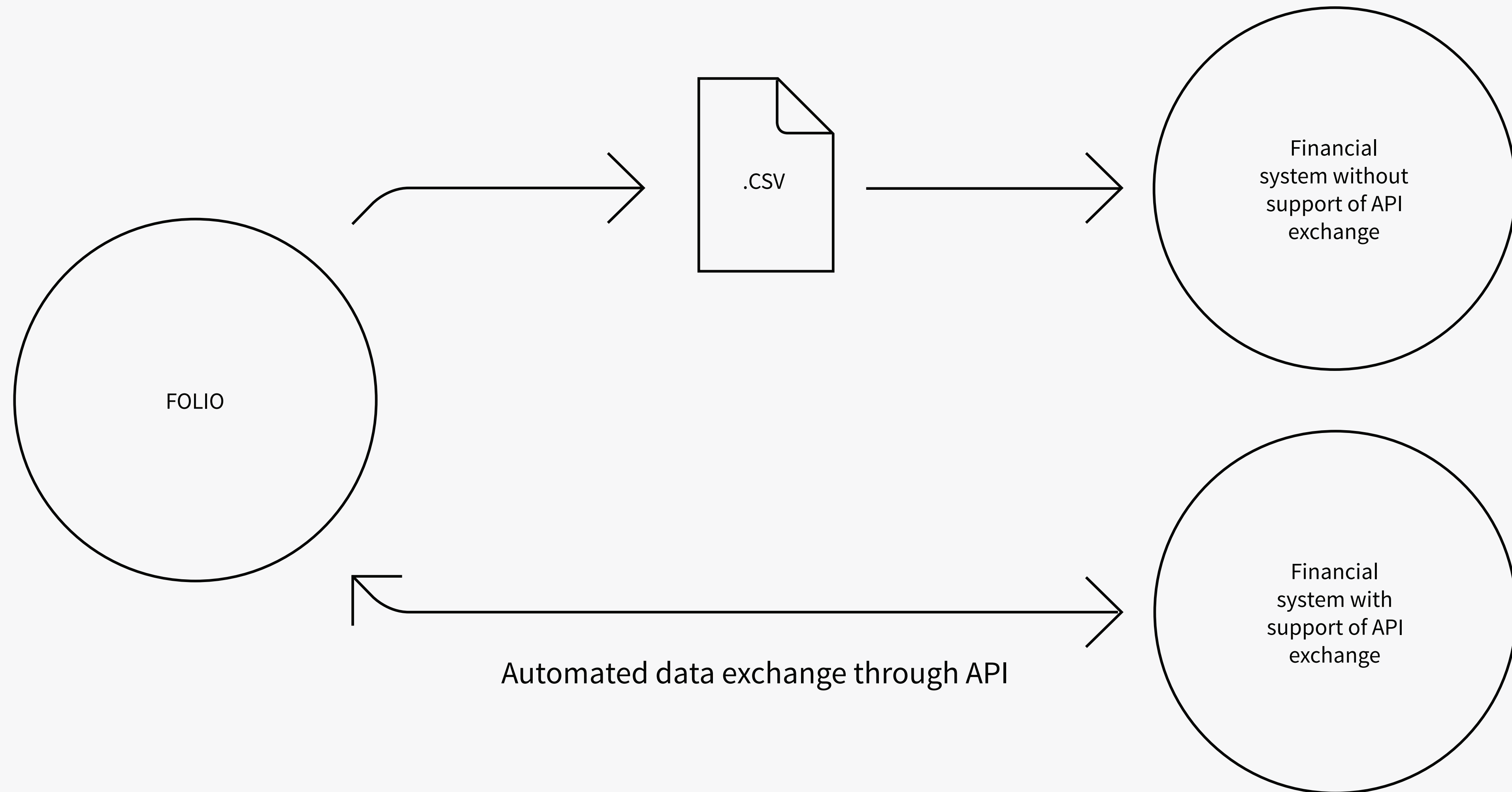
E.g. being able to CC the FOLIO system on library–vendor emails



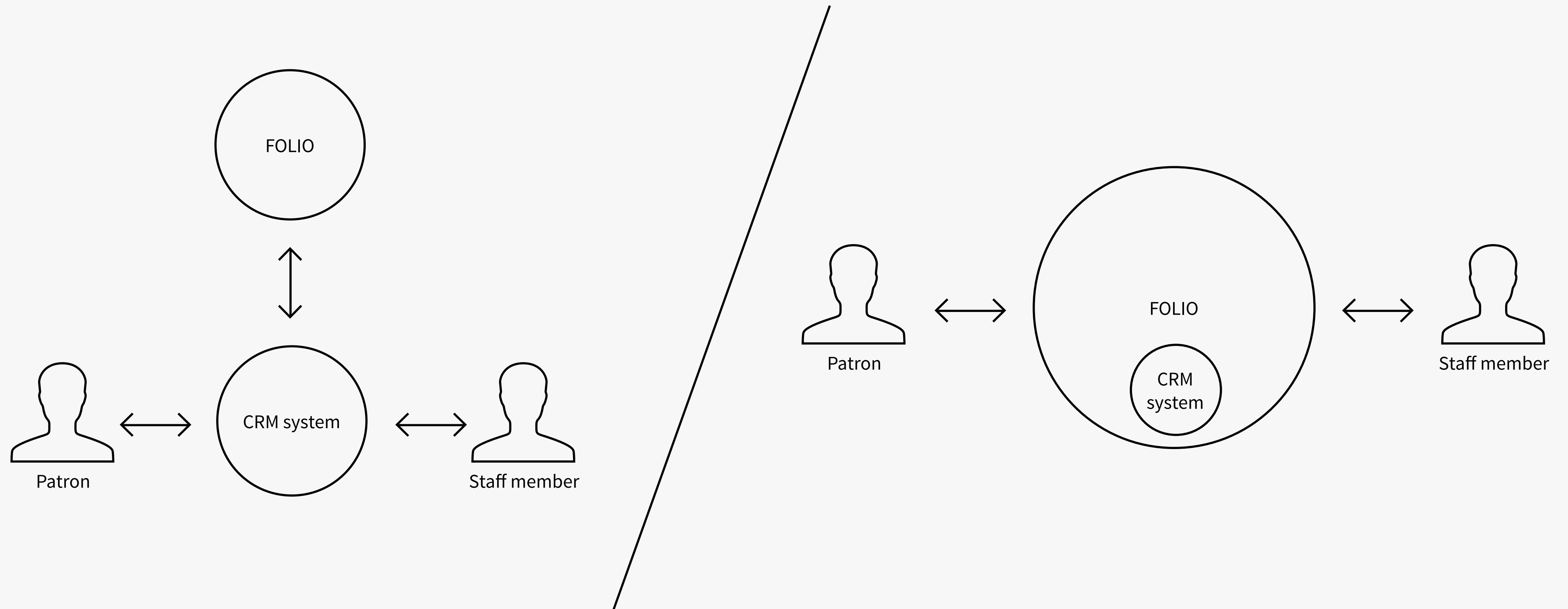
Feature idea: Intuitive overview of tasks pending and tasks in progress
With the option to assign tasks through workflow templates and ad hoc



Feature idea: Ability to have FOLIO automatically export financial data
To support easy data transfer from FOLIO to closed off financial systems



Feature idea: Easy-to-use CRM* system to optimize troubleshooting For resources and platforms, through built-in or third-party functionality



* CRM = Customer Relationship Management

This concludes the Turbo Recap of the workshop

Follow the process and get involved on discuss.folio.org