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

Turbo Recap

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

- Resource Management SIG
- Accessibility SIG*
- User Management SIG
- Resource Access SIG
- Internationalization & Localization SIG*
- Metadata Management SIG
- UX driven development

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

Selection has been made
- Purchase process
- License process
- Payment process
- First-time or one-time acquisition
- Receiving / Access setup

Renewal

Continuing resources only

Resource management
General, high level workflow for one-time (incl. first-time) acquisitions

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

- Review Budget
- Receive order from requester
- Initial acquisition (Either through FOLIO or through vendor system with API)
- Select vendor and platform (incl. consortial purchase options)
- Contact vendor
General, high level workflow for renewing a resource

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

1. Review budget
2. Identify resources to renew and view them in a list
3. Renew by default or decide if each resource creates sufficient value for patrons to merit renewal (through e.g. usage statistics, qualitative input, overlap with other resources)
4. If resource creates sufficient value for patrons, identify alternative formats / methods of access for resource (e.g. switch from print to electronic version)
5. Negotiation with vendor
6. Cancel or renew resource
7. If resource creates sufficient value for patrons, identify resource changes since the last renewal / purchase (content changes, embargo changes, changes to business terms)
8. Handle ongoing resource changes (license, access, publisher, bibliographic)
FOLIO should have a basic, but integrated, financial management system.

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

1. Identify funding sources
2. Create fund
3. Edit fund
4. Allocate money to fund
5. Create purchase order and link it to a fund (aka encumber funds)
6. Pay for resource
7. Debit money from fund
8. Release any unused encumbrance
9. Adjust payment when necessary
10. Process credits
11. Report on funds
12. Year-end spending
13. Fiscal year rollover
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

Selector

Selection of resource automatically generates basic record

Knowledge base

Resource librarian

Manages purchase, license, sets up access and expands record

Cataloger

Adds detailed metadata to record
Feature idea: Email integration for RM workflows

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

- FOLIO saves history of correspondence for institutional memory and searchability

Library staff

Email correspondence

Vendor, publisher, etc.
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.

Automated data exchange through API
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