

Integrating FOLIO into ERM Workflows at Duke University Libraries

TRLN Annual Meeting 2022

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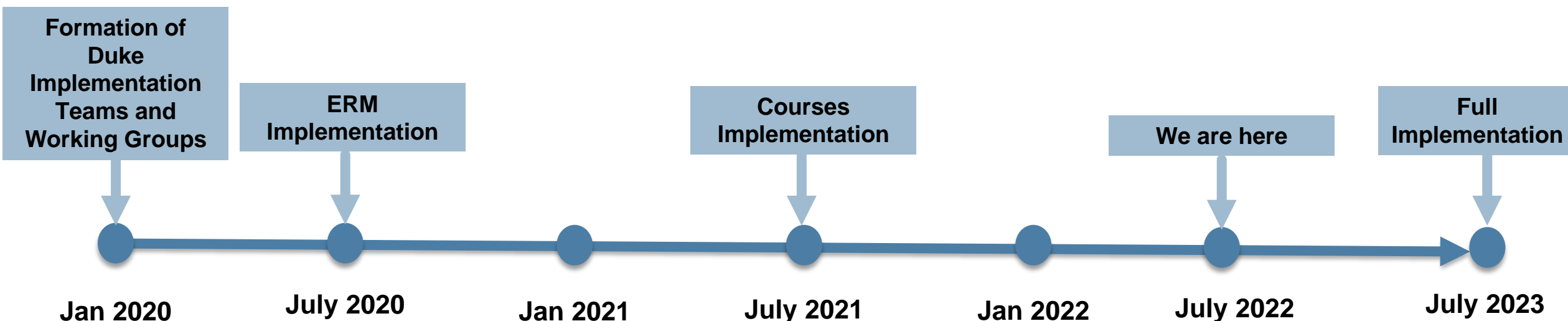
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FOLIO at Duke




FOLIO is a collaboration of libraries, developers and vendors building an open source library services platform. It supports traditional resource management functionality and can be extended into other institutional areas.





ERM Apps

 **Licenses**

 **Agreements**

 **eUsage**

Supporting Apps

 **Organizations**

 **Users**

 **Settings**



- No ERM system before FOLIO - added “traditional” ERM functionality
 - Created structured records for license agreements and amendments, linked out to documents
 - Coded license terms for at-a-glance interpretation of agreements
 - Potential for surfacing in discovery at a later date
 - Complex searching and filtering options
 - Store vendor contact information, admin account information in FOLIO, not spreadsheets
- Integration into Trello-based workflows
 - Ensure that License records are created and updated as license negotiations take place
 - Ensure that License and Organization records are maintained when other workflows may affect them (e.g., cancellations, new subscriptions, etc.)



Licenses

Agreements

Dashboard

Licenses

Organizations

PERKN-DESK

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

Organization role

Tags

Start date

End date

Terms

0 term filters applied

Term filter builder

Term filter 1

Term*

Is Cancellation/Termination language included?

Comparator*

is

Value*

No

Add rule

Add term filter

Cancel

Apply

	Start date	End date
	3/16/2008	Open ended
	11/14/2016	Open ended
	10/10/2011	Open ended
	6/4/2013	Open ended
	10/31/2018	Open ended
	2/1/2004	Open ended
	7/26/2018	Open ended
	6/10/2002	Open ended
	4/27/2009	Open ended
	7/1/2013	Open ended

Organizations



Organizations

Agreements Dashboard Licenses Organizations PERKN-DESK

Search & filter

All

elsevier

Search

Reset all

Organizations status

Active

Inactive

Pending

Tags

Is vendor

Country

Languages

Payment method

Acquisition unit

Organizations

2 records found

New

Name	Code
Elsevier B.V.	EELSEVI
LexisNexis	ELEXIS_

Elsevier B.V.

Actions

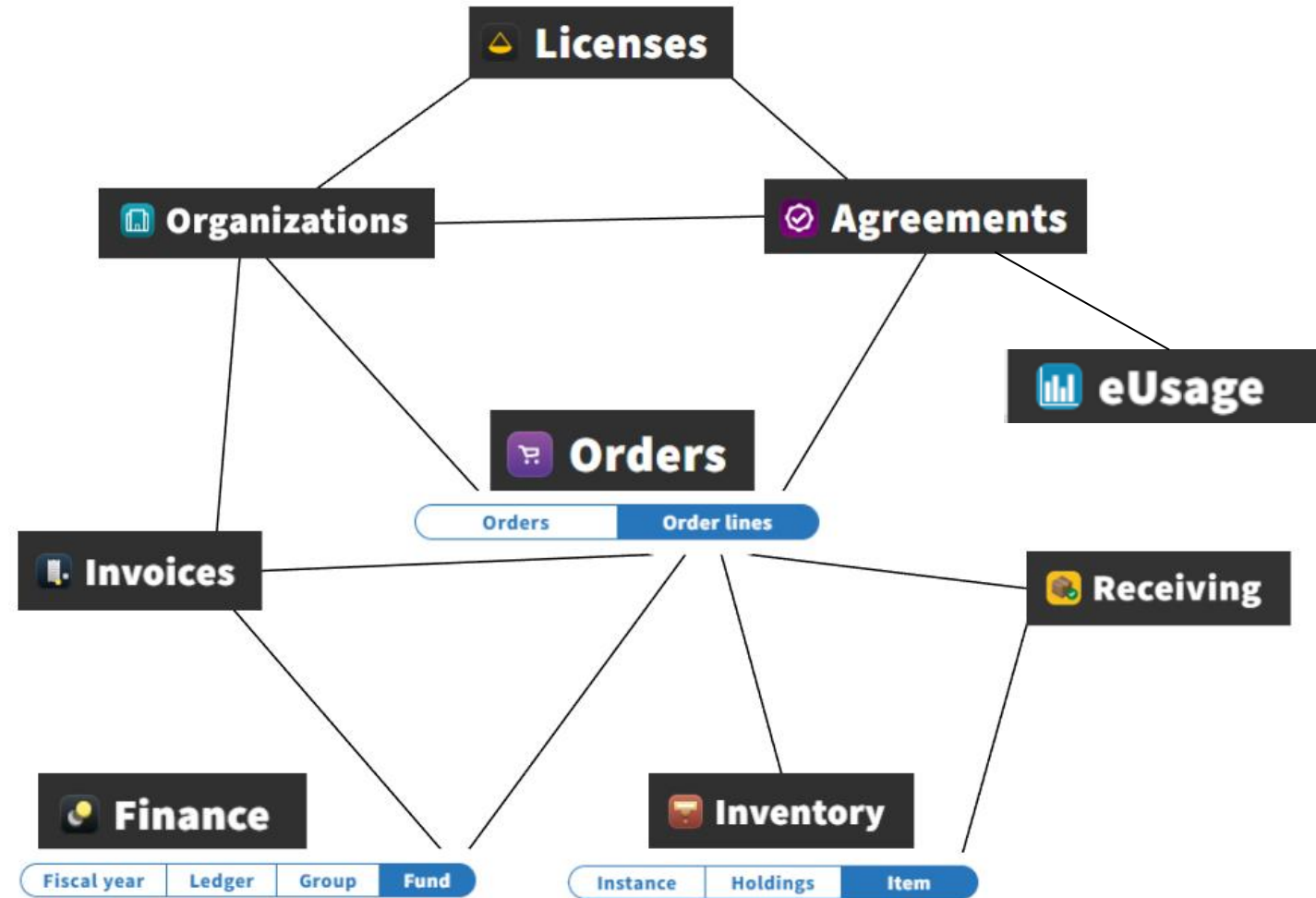
Contact information

Contact people

Name	Categories	Email	Phone	Status
Buchanan, Samantha	-	s.buchanan@elsevier.com	-	Active
Capate, Rowie	-	rowie.capate@elsevier.com	937-865-7086	Active
Elifritz, Charity	-	c.elifritz@elsevier.com	(347) 291-5843	Active
Frana, John	Sales	j.frana@elsevier.com	-	Active
Gordon, Shannon	-	s.gordon@elsevier.com	651-242-0904	Active
Hallerman, Todd	Account Manager	t.hallerman@elsevier.com	919-694-5058	Active
Hayes, Keith	-	k.hayes@elsevier.com	-	Active
Kilpatrick Klein, Joanna	-	J.Kilpatrick@elsevier.com	919-703-0298	Active
Milazzo, Melissa	-	m.milazzo@elsevier.com	(619) 699-6288	Active
Samkurashvili, Irakli	-	i.samkurashvili@elsevier.com	(240) 328-7459	Active
Schwartz, Michael	-	m.schwartz@elsevier.com	-	Active
Tsiames, Alex	Account Manager	a.tsiames@elsevier.com	718-207-1348	Active

Interface

FOLIO ERM: Relationships



The (near) Future of ERM apps: eUsage, Agreements

 **Agreements**

 **eUsage**





FOLIO (near) Future - eUsage

Current

- Manual quarterly stats gathering for major content providers to support:
 - Routine and ad hoc and CPU analysis at Duke (calendar year)
 - Multiple national usage stat reports, including ACRL/IPEDS, ARL (fiscal year)

e (L:) > Departments > ContinuingResourceAcquisitions > CRA > Usage Statistics

Name	Date modified
Business Expert Press	5/5/2022 2:52 PM
CAIRN	5/5/2022 2:56 PM
Cambridge University Press	5/5/2022 3:10 PM
Canadian Science Publishing	5/6/2022 1:53 PM
CAS	6/15/2022 2:17 PM
Casalini Libri	4/28/2022 3:09 PM
CEDROM-SNi	3/14/2022 1:17 PM
CEEOL	1/26/2022 3:05 PM
Chadwyck-Healey	5/6/2022 2:04 PM
CIBTC	7/13/2021 8:30 AM
Clarivate	5/4/2020 10:14 AM
Classiques Garnier	4/6/2022 3:52 PM
CNKI	5/16/2022 3:31 PM
Columbia University Press (CUP)	5/2/2022 4:45 PM
Company of Biologists	5/2/2022 4:46 PM
CREDO	5/2/2022 4:49 PM
CSIRO Publishing	5/2/2022 4:49 PM
De Gruyter	5/6/2022 12:29 PM
Docuseek2	5/2/2022 4:50 PM
DRAM	4/25/2022 2:34 PM
Duke University Press	5/2/2022 4:52 PM



FOLIO (near) Future - eUsage

(near) Future

- Regular, automated stats gathering via SUSHI
 - Much less manual work
 - Stats will be more up to date
 - Easier to support regular reporting needs that require fiscal *or* calendar year data

▼ Harvesting configuration

^ Statistics

^ COUNTER

Reports grouped by year

Overview about harvested statistics per year. Expand a year and click a colored button to download/delete report or get additional info.

[Collapse all years](#)

^ 2018

Report	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
JR1												

^ 2019

Report	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
JR1												

▼ 2020

Download reports for multiple months

Start (Year-Month) End (Year-Month)

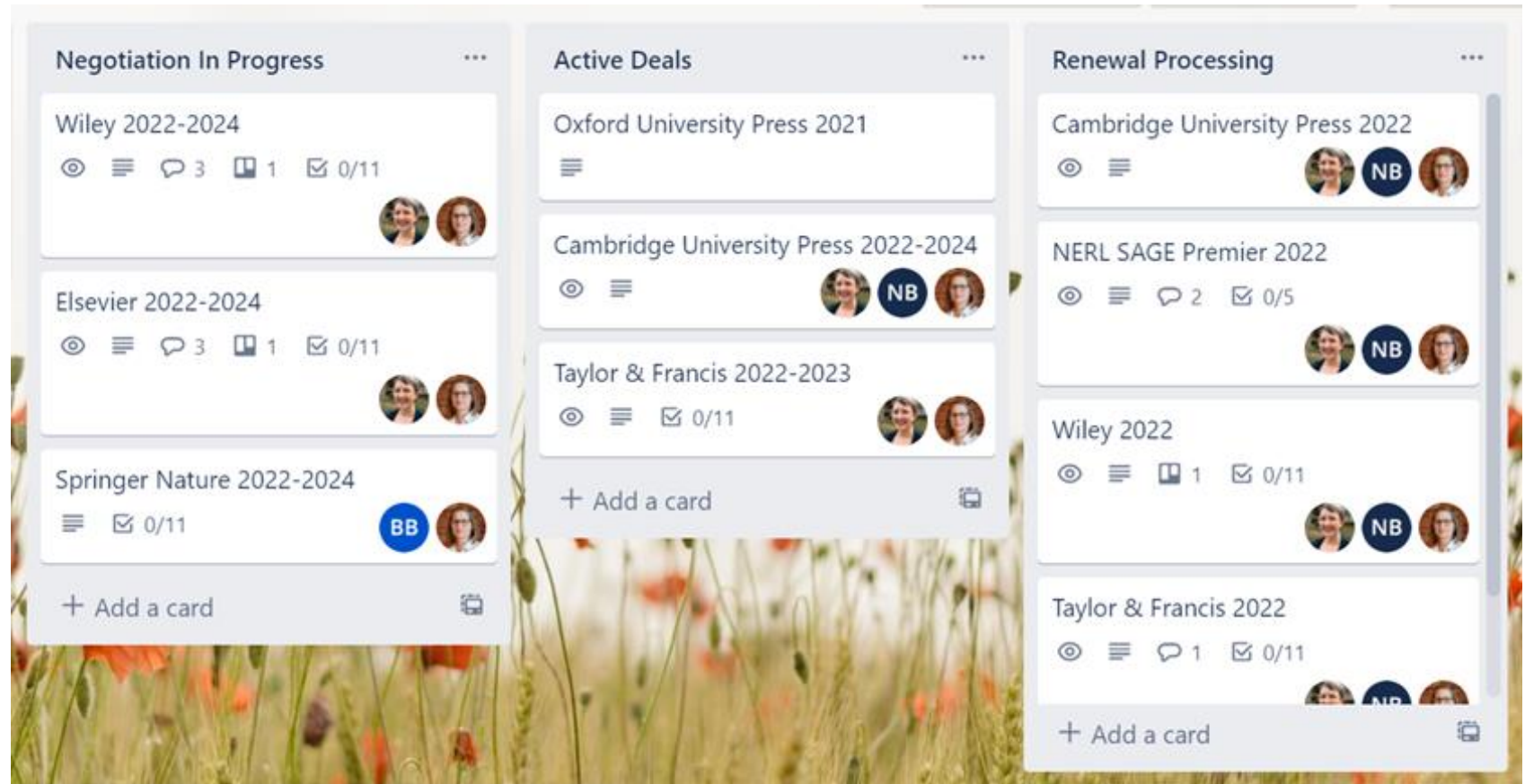
Report type Data type [Download](#)



FOLIO (near) Future - Agreements

Current

Not much to
compare to!

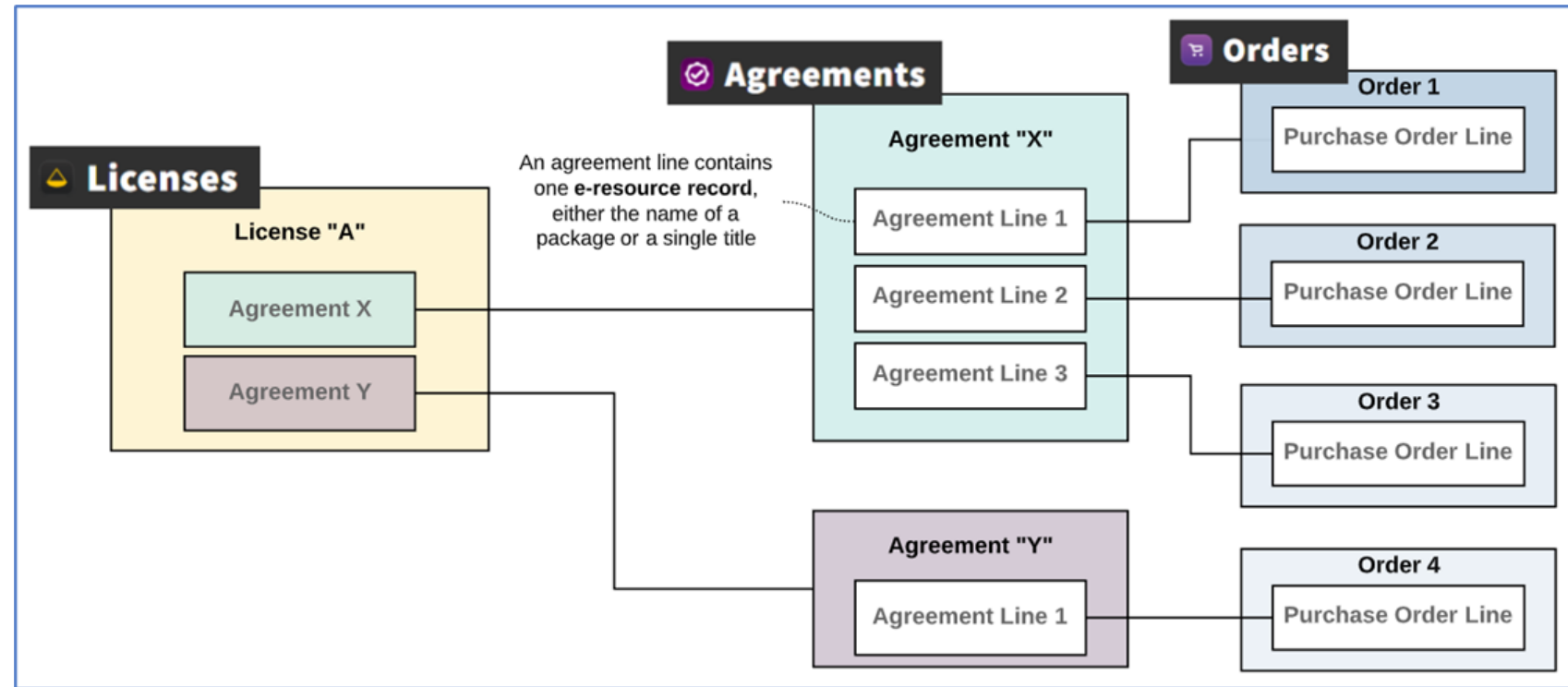




FOLIO (near) Future - Agreements

(near) Future


Centralized,
integrated place
for details about
deals and
arrangements
with vendors
and content
providers



The Future of FOLIO: Acquisitions & Supporting Apps



Acquisitions Apps

 **Orders**

 **Receiving**

 **Invoices**

 **Finance**

Supporting Apps

 **Inventory**

 **Organizations**

 **Users**

 **Settings**

Orders



Orders

Agreements

Check in

Check out

Circulation log

Courses

Dashboard

Data export

Data import

eHoldings

ERM comparisons

eUsage

Apps

Search & filter

Orders

Order lines

Keyword

Search

Reset all

Status

Closed

Open

Pending

Prefix

Suffix

Approved

Acquisition unit

Assigned to

Created by

Date created

Date ordered

Order type

Vendor

Tags

Reason for closure

Re-encumber

Subscription

Renewal date

Manual renewal

Review period

Bill to

Ship to

Orders

5,401 records found

Actions

PO number	Vendor code	Status	Order type
1147460PERKN	PCENGAGE LEARNING	Open	Ongoing
1147235PERKN	PHARRASSOWITZ	Open	Ongoing
15920PERKN	PGIFT	Open	Ongoing
52021BES	PGIFT	Open	Ongoing
19309PERKN	PHEZEKIAH OLUWASANMI	Open	Ongoing
53113PERKN	PNATL TAIWAN UNIV	Open	Ongoing
16813PERKN	PUNIWERSYTET WROCLAW	Open	Ongoing
17302PERKN	PDEBRECEAN UNIV	Open	Ongoing
22424FORD	FEBSC	Open	Ongoing
22646FORD	FEBSC	Open	Ongoing
12193FORD	FEBSC	Open	Ongoing
19255PERKN	PGIFT	Open	Ongoing
11386FORD	FESP	Open	Ongoing
18923BES	PGIFT	Open	Ongoing
15151VESIC	PGIFT	Open	Ongoing
17257PERKN	PBIBL NACIONAL RJ	Open	Ongoing
15103FORD	FRMA	Open	Ongoing
19271PERKN	PGIFT	Open	Ongoing
16375PERKN	PGIFT	Open	Ongoing
15062PERKN	PUNIV PONTIFICIA BOL	Open	Ongoing
15336PERKN	PGIFT	Open	Ongoing
15935PERKN	PINST RES HUMANITIES	Open	Ongoing
18713PERKN	PUNIV WEST INDIES	Open	Ongoing

< Previous

1 - 50

Next >

PO Line details - 1147235PERKN-1

Comparative sociology.

Actions

0

Collapse all

Item details

Record last updated: 7/7/2022 1:15 PM

Title

Comparative sociology.

Receiving note

Subscription from

Subscription to

Subscription interval

Publication date

Publisher

Edition

Linked package

Contributors

The list contains no items

Product identifiers

Product ID	Qualifier	Product ID type
1569-1330		ISSN

Internal note

Purchase order line

POL number

Acquisition method

Order format

Created on

Receipt date

Receipt status

Payment status

Source

Donor

Selector

Requester

Cancellation restriction

Rush

Collection

Receiving workflow

Future Improvements & Integrations: Acquisitions apps



Acquisitions Apps

- Exporting order information
- Moving POs between instances
- Templates for order creation
- Serials management work

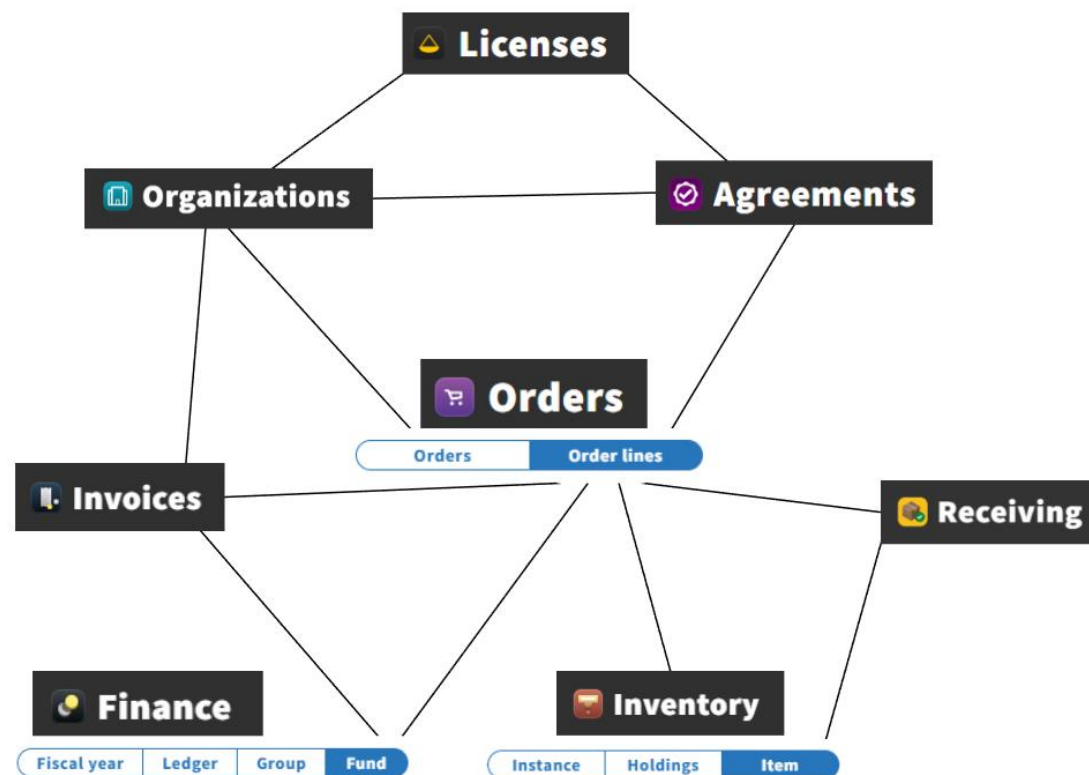
Aleph	FOLIO Community Terminology	FOLIO System Apps	FOLIO Brief App Description
Acquisitions	Resource Management	Organizations	Vendors, publishers, providers
		Finance	Budgets, Funds
		Orders	Orders of materials or services
		Inventory	Instance, holding, and item records (physical and/or electronic materials)
		Invoices	Invoices for payment to vendors
		Receiving	Receiving ordered materials, serials check-in

Future Improvements & Integrations: Supporting apps



Supporting Apps

- Everything in one place!
- Package management / e-resource management improved with implementation of Agreements app
 - no fake bib needed for package order
 - order, instance, licensing data more clearly linked





Thank you!

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