Resource management in practice
Summary of learnings from the RM workshop in Boston, November 2016

Filip Jakobsen · Dec 08, 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).

- Resource Management SIG
- Accessibility SIG*
- User Management SIG
- Resource Access SIG
- Resource Discovery SIG*
- Research Data 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
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

Flow coming soon
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. Allocate money to fund
4. Create purchase order and link it to a fund (AKA encumber funds)
5. Pay for resource
6. Debit money from fund
7. Release any unused encumbrance
8. Adjust payment when necessary
9. Process credits
10. Report on funds
11. Year-end spending
12. Fiscal year rollover
13. Edit fund
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.
Automated feed for better integration with external financial systems (?)
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This concludes the summary of the RM workshop learnings

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