



# Multi-Institutional Features in EBSCO ERM in FOLIO

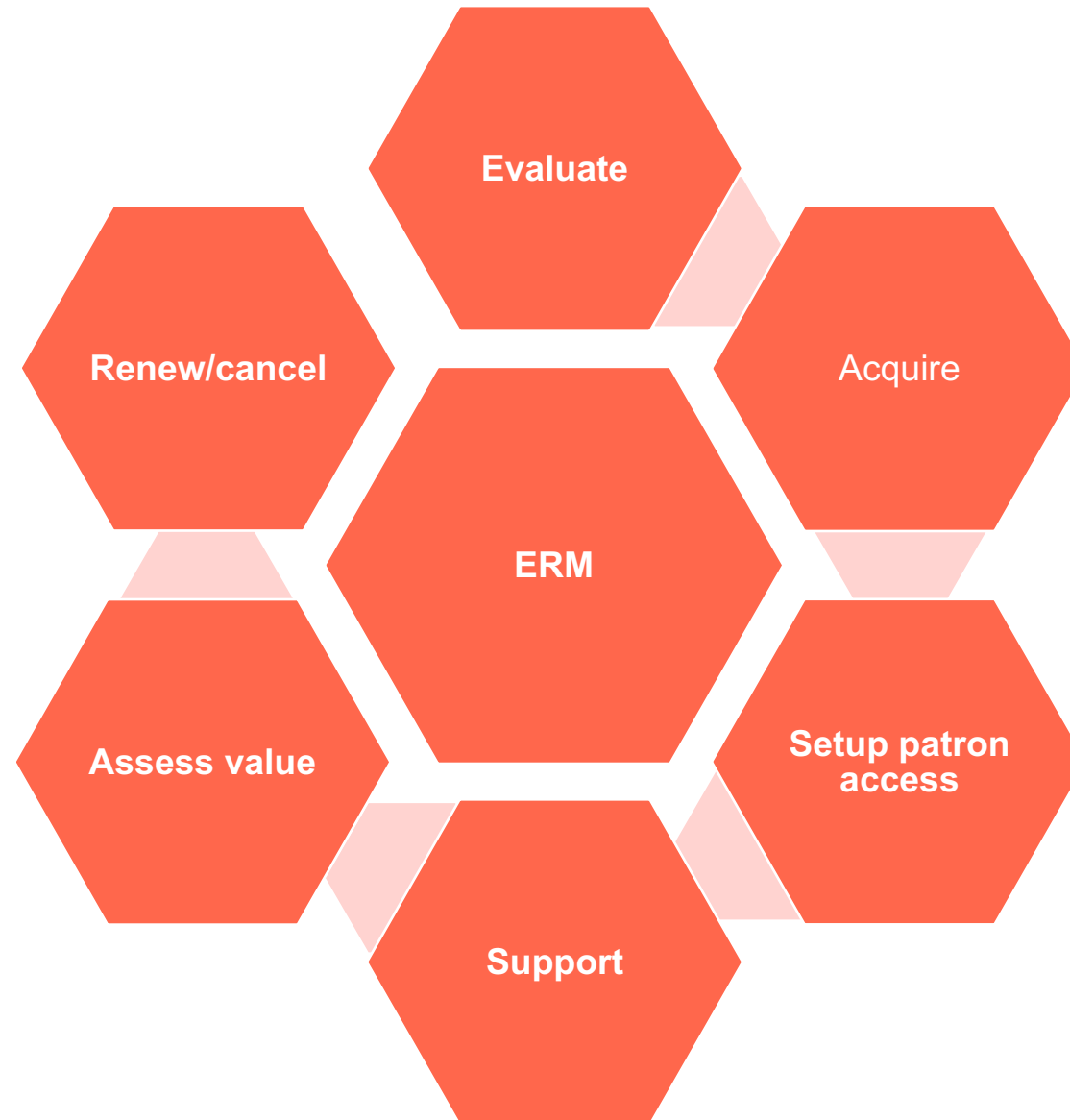
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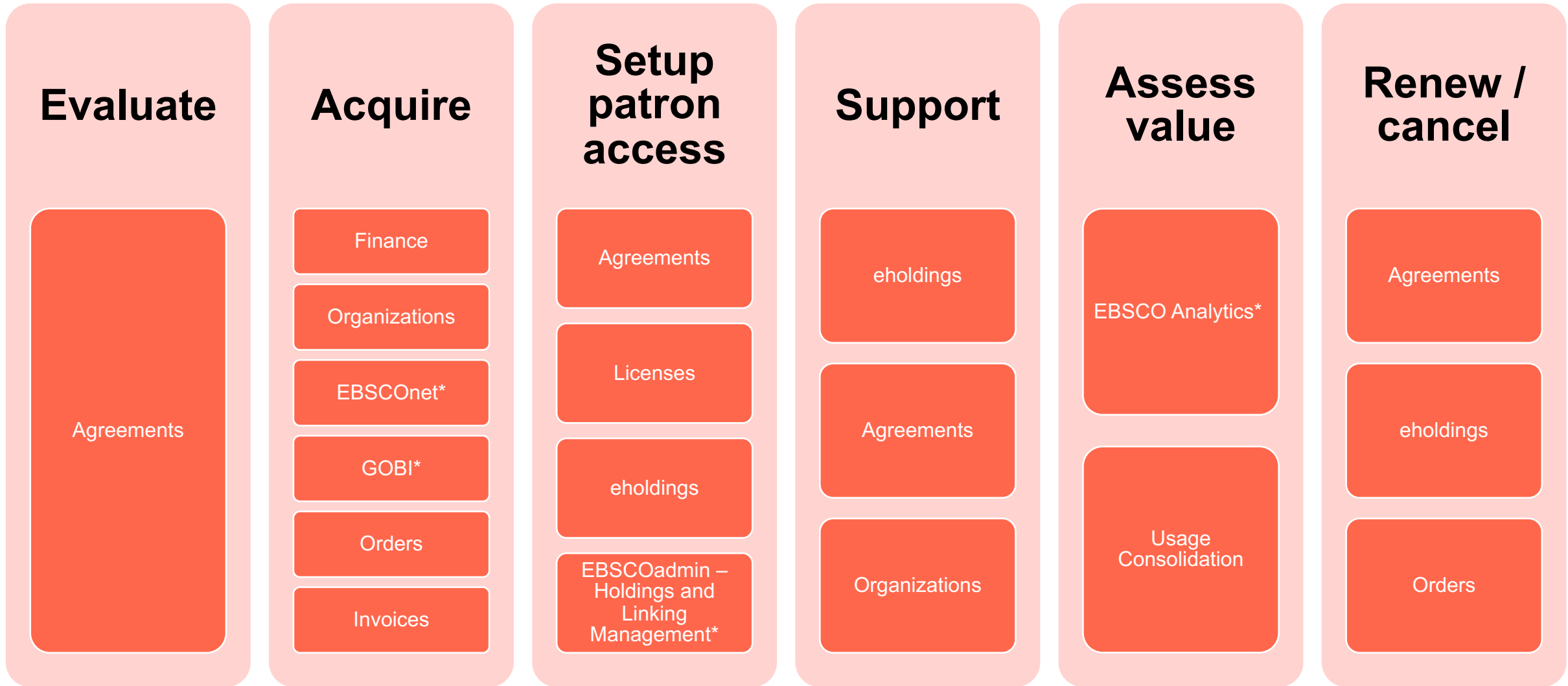
## EBSCO ERM in FOLIO VISION

- **Flexible** – Implement **YOUR** workflow(s)
- **Streamline your workflow(s) with integrations** with EBSCO products and services
- **Execute** key workflow activities on a **single platform**
- **Measure** value

# ERM Lifecycle in FOLIO



# EBSCO ERM in FOLIO Overview – Apps & Integrations



\*Not a FOLIO app.

## Customers live with EBSCO ERM in FOLIO

- Chalmers University of Technology
- Five Colleges (consortia)
- Missouri State University
- Cornell University

# DEMO | Multiple Libraries - ERM



# Upcoming EBSCO ERM in FOLIO features



# Task Management app



- Is an application that supports a library tracking key processes in FOLIO
- Allows staff members to view assigned tasks and track progress

**Tasks** | Tasks | Check out | Check in | Users | Requests | Inventory | eHoldings | Agreements | Licenses | Organizations | Apps

Search & filter < | **Tasks** | 7 records found | **New**

**Task list** | Job templates | Jobs

Search

Reset all

**Status**

- Cancelled
- Completed
- Created
- In Progress
- Blocked
- On Hold
- Failed

**Assigned to**

Medhurst, Ada Brionna

[Assign to me](#) | [User look-up](#)

Task name	Assigned to	Priority	Status	Start date	Due date
Review America's Test Kitchen - latest book for grilled cheese sandwich recipes	Ada Medhurst	Medium	In Progress	2020-08-05	2020-08-08
Place a skillet on the stove and set to Medium heat	Ada Medhurst	Low	In Progress	2020-08-04	2020-08-06
Add several slices of cheese	Ada Medhurst	Low	Created	2020-08-04	2020-08-06
Place the second slice of bread on top of the cheese	Ada Medhurst	Low	Created	2020-08-04	2020-08-06
With a spatula, flip over the sandwich. Check that the slice of bread on top is golden brown	Ada Medhurst	Low	Created	2020-08-04	2020-08-06
Grill the slice of bread for about a minute	Ada Medhurst	Low	Created	2020-08-04	2020-08-06
Remove from the skillet and slice in half	Ada Medhurst	Low	Created	2020-08-04	2020-08-06

End of list





# Task Management Capabilities

- **Task Creation**

- Personal task
- Job Template (repeatable task list) > Job
- Link to any FOLIO record

- **Task Assignment**

- User
- Teams

- **Task List Management**

- Search for tasks
- View by assigned user
- View by status

# Usage Consolidation: Packages

- Metrics
  - Summary table
  - Cost
  - Usage
  - Cost per use
  - % of usage
  - % of budget
  - Fund codes
  - Purchase Order line
- Functionality
  - View metrics by year and platforms
  - View all selected titles
  - Drilldown to title details
  - Export titles list

Wiley Online Library Full Collection 2020

Usage & analysis

Package cost	Total usage	Cost per use	% of budget	Fund code(s)	PO(s)
\$5,175 (USD)	6,149	\$0.81 (USD)	29%	STEM, EXCH-SUBN	EB-234-567, EB-234-568

Title	Type	Cost	Usage	Cost per use	% of usage
3D Research	Journal	\$400	975	\$0.41	16%
Algebra and Logic	Journal	\$500	975	\$0.51	16%
Nature	Journal	\$750	975	\$0.77	16%
3 Biotech	Journal	\$500	844	\$0.59	14%
Acoustical Physics	Journal	\$950	844	\$1.13	14%
Dairy science & technology	Journal	\$750	844	\$0.89	14%
AAPS	Journal	\$800	481	\$1.66	8%

# Usage Consolidation : Titles

- Metrics
  - Selected packages
  - Coverage date
  - Embargo info
  - Cost
  - Usage
  - Cost per use
- Functionality
  - Ability to view metrics by year and platforms

eHoldings Data export Data import eHoldings Inventory Invoices Users Apps

Journal of Fish Biology [Collapse all](#)

Journal of Fish Biology

▼ Title information

▼ Packages

^ Usage & analysis ⓘ

Year: 2019 Platform: All platforms [View](#)

**Holdings summary**

Package ^	Coverage	Title cost	Usage	Cost per use
<a href="#">ProQuest Agricultural Science (DRAA)</a>	01/01/1969 - present	\$500.00 (USD)	2,225	\$0.22 (USD)
<a href="#">Wiley Online Library Full Collection 2020</a>	01/01/1997- present (full text delay: 90 days)	\$800.00 (USD)	2,225	\$0.36 (USD)

**Full text request by platform usage**

Platform	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Publisher
IngentaConnect	60	55	50	110	65	50	50	100	50	130	68	56	844	Yes
Proquest	75	80	80	105	85	75	75	75	75	100	75	75	900	No
Wiley Interscience	40	40	40	90	50	25	22	30	24	60	40	20	481	Yes
Wiley Online Library	50	60	61	89	80	65	75	55	80	120	80	85	900	Yes
All publisher platform(s) total	150	155	152	289	195	140	147	185	154	310	188	161	2,225	
All non-publisher platform(s) total	75	80	80	105	85	75	75	75	75	100	75	75	900	
All platform(s)	225	295	232	394	280	215	222	310	229	410	263	236	3,125	

# Appendix





# Agreements

Serves as a landing page

Provides an overview of your current relationship with a resource(s)

The screenshot displays the 'Agreements' section of the Folio system. The top navigation bar includes 'Inventory', 'eHoldings', 'Agreements', 'Licenses', 'Organizations', 'eUsage', 'Codex Search', and 'Settings'. The main content area is divided into three panels:

- Search & filter:** Includes a search input field, a 'Search' button, a 'Reset all' button, and a list of filters such as Status (Active, Requested, Draft, Closed, In Negotiation), Renewal priority, Is perpetual, Organizations, Organization role, Internal contacts, Internal contact role, Tags, and Supplementary properties.
- Agreements list:** Shows a list of 63 records. The first record is '2019 - 2021 Taylor & Francis Journal Packages'. Other records include '2021 - 2023 Sage Collection', 'abc Lizenz (Bugfest#subscription:18902c3e-59ce-46bc3e152d81c0d4)', 'Big Publisher ebooks', 'Big Publishers EBA', 'BugFest Additional New Agreement', 'BugFest Chi New Agreement', and several 'Daten A' entries with various subscription IDs.
- Details for '2019 - 2021 Taylor & Francis Journal Packages':**
  - Table:**

Period start	Period end	Status	Vendor
1/1/2020	12/31/2021	Active	Not set
  - Description:** Agreement for Taylor & Francis Journal Packages
  - Cancellation deadline:** 9/30/2020
  - Renewal priority:** Definitely renew
  - Is perpetual:** -
  - Agreement period note:** -
  - Expand all:** A button to expand all sections.
  - Internal contacts:** 1 contact
  - Agreement lines:** 6 lines
  - Controlling license:** 1 license
  - Future licenses:** 0 licenses
  - Historical licenses:** 0 licenses
  - External licenses:** 0 licenses
  - License and business terms:** -
  - Organizations:** -



# Licenses

Manage licenses and amendments

Upload or link licenses to record

Ability to compare licenses terms of use

The screenshot displays the Folio Licenses management interface. At the top, there is a navigation bar with tabs for Users, eHoldings, Agreements, Licenses (active), Organizations, Orders, Codex Search, and Settings. Below the navigation bar, there is a search and filter section on the left, a list of licenses in the center, and a detailed view of a specific license on the right.

**Search & filter**

Search

Reset all

**Status**

- In negotiation
- Not yet active
- Active
- Rejected
- Expired

**Type**

- Local
- Consortial
- National
- Alliance

**Organizations**

- Organization role
- Tags
- Terms

**Licenses List**

Name	Type	Status	Start date	End date	Licensor
American Association for the Advancement of Science/2014-2114	Local	Active	1/1/2020	12/31/2021	Not set
Big Publisher ebook license					
BugFest Chi New License					
FH Goldenrod test license					
FH: Test 14395					
<b>FY 2019 - 2021 Taylor and Francis</b>					
lagertha					
MS:TestProvider:2020-2024					
Permissions testing					
Sage Collection					
Test License 001					
Test License 002					

End of list

**FY 2019 - 2021 Taylor and Francis**

Type: Local, Status: Active, Start date: 1/1/2020, End date: 12/31/2021, Licensor: Not set

**Description**

License includes a statement on accessibility. Also includes an amendment due to COVID-19.

**Internal contacts** 0

**Organizations** 0

**Core documents** 0

**Terms**

**Amendments** 1

**Supplementary documents** 0

**Agreements linked to this license** 3

**Notes** 0

# eHoldings

Manage your electronic resource holdings

Patron access configuration

Powered by HoldingsIQ API; uses same knowledge base services as Holdings and Link Manager thus any changes made in either application are reflected in the other system in real-time



**eHoldings** Users eHoldings Agreements Licenses Organizations Orders Codex Search

× American Society for Microbiology Journals

^ **Tags**

renewal\_2021 ×

∨ **Holding status**

∨ **Package information**

^ **Package settings**

**Show titles in package to patrons**  
Yes

**Automatically select new titles**  
Yes

**Proxy**  
Inherited - FOLIO-Bugfest

**Access status type**  
Subscribed

∨ **Coverage settings**

∨ **Agreements** 0

∨ **Notes** 0

∨ **Titles**

# Holdings and Linking Management



Import holdings

Export holdings

Full text link resolver setup

Leverages the same knowledge base as eholdings app

Customize Services Authentication **Holdings Management** Local Collections Reports & Statistics Database Title Lists

Overview Titles Packages Vendors Platforms Links Notes Upload Download

Enter a search term Title Name Search

### Holdings

Titles <b>1,951,828</b>	1 Custom <b>1,951,827</b> Managed	Packages <b>240</b>	3 Custom <b>237</b> Managed	Vendors <b>135</b>
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### Quick Actions

- Create Custom Resource
- Manage Your Links
- Upload Your Holdings
- Root Proxy Setting
- Create Custom Package
- Manage Your Notes
- Download Your Holdings
- Full Text Finder Reports
- Match Custom Titles to EBSCO's Global Knowledge Base
- Submit a Knowledge Base Content Inquiry

### Holdings Upload/Download Status

File Name	Status	Date	Matching
Usage2020	Download Completed (685 B)	06/12/2020	
KBART 06122020	Download Completed (576 KB)	06/12/2020	



# Usage Consolidation



Load usage and cost data

Access to COUNTER Release 5 usage reports

Capture Cost per Use details

Title Name <b>Nature</b>					
Package Name	Content Type	Coverage	Available Titles	Current Holdings	# of Titles Selected
Springer Nature Journals	E-Journal	01/01/2010 - Present *	4,114	✓	2,271

[View Other Packages](#) ▾

- [Details](#)
- [Links \(4\)](#)
- [Notes \(0\)](#)
- [Cost Records \(2\)](#)
- [Usage Analysis](#)
- [Holdings Changes from GOBI \(0\)](#)

Analysis Year: 2018 ▾

Total Cost:	10,898.74	AUD
Usage:	44	↑
Cost per Use:	247.70	AUD

Platform	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total	Publisher Platform?
OvidSP	0	0	15	27	0	2							44	Y
EBSCOhost	7	3	7	9	17	3	22	37	35	53	19	16	228	N
ProQuest				72	145								217	N
<b>Total Non-Publisher Platform Usage</b>	<b>7</b>	<b>3</b>	<b>7</b>	<b>81</b>	<b>162</b>	<b>3</b>	<b>22</b>	<b>37</b>	<b>35</b>	<b>53</b>	<b>19</b>	<b>16</b>	<b>445</b>	
<b>Total Publisher Platform Usage</b>	<b>0</b>	<b>0</b>	<b>15</b>	<b>27</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>44</b>	
<b>Total Usage for All Platforms</b>	<b>7</b>	<b>3</b>	<b>22</b>	<b>108</b>	<b>162</b>	<b>5</b>	<b>22</b>	<b>37</b>	<b>35</b>	<b>53</b>	<b>19</b>	<b>16</b>	<b>489</b>	

# Usage Consolidation



Overview **Titles** Packages Vendors Platforms [Links](#) [Notes](#) [Upload](#) [Download](#) Languages ▾

[« Back](#)

Title Name  
**Nature**

Package Name	Content Type	Coverage	Available Titles	Current Holdings	# of Titles Selected	
Springer Nature Journals	E-Journal	01/01/2010 - Present *	4,114	✓	2,271	<a href="#">View Other Packages ▾</a>

[Details](#) [Links \(4\)](#) [Notes \(0\)](#) [Cost Records \(2\)](#) **Usage Analysis** [Holdings Changes from GOBI \(0\)](#)

Analysis Year: 2018 ▾

Analysis

Total Cost:	10,898.74	AUD	
Usage:	44		↑
Cost per Use:	247.70	AUD	



# Orders

Create/View POs and POLs

Create bibliographic and item records

Track order status

**Orders** 5,350 records found New

Search & filter <

**Orders** **Order lines**

Keyword

Search

Reset all

**Status**

- Closed
- Open
- Pending

**Approved**

**Acquisitions unit**

**Assigned to**

**Created by**

**Date created**

**Date ordered**

**Order type**

**Vendor**

**Tags**

**Reason for closure**

**Re-encumber**

**Renewal date**

PO number	Vendor code	Status	Order type
msl8987	MAJORSC	Open	Ongoing
msl8986	MAJORSC	Open	Ongoing
msl8786	MAJORSC	Open	Ongoing
msl8754	MAJORSC	Open	Ongoing
msl8753	MAJORSC	Open	Ongoing
msl5613	HRSW	Open	Ongoing
msl5413	HRSW	Open	Ongoing
msl5400	HRSW	Open	Ongoing
msl2AAH0905	MAJORSC	Open	Ongoing
msl2AAA5403	MAJORSC	Open	Ongoing
msl2AAA4242	HRSW	Open	Ongoing
msl2837	MAJORSC	Open	Ongoing
msl2835	MAJORSC	Open	Ongoing
msl2727	HRSW	Open	Ongoing
msl1AAH6532	MAJORSC	Open	Ongoing
msl1AAH5394	MASLAP	Open	Ongoing
msl1AAH5393	CVM_TAMU	Open	Ongoing
msl1AAH2489	HRSW	Open	Ongoing

**Purchase order - msl5413** Ongoing Actions

Note

**Ongoing order information**

Subscription	Review date	Notes
<input type="checkbox"/>		

**PO summary**

Total units	Approved	Workflow status
1	<input checked="" type="checkbox"/>	Open

**Total estimated price** \$0.00

**Total encumbered** \$0.00

**Related invoices**

The list contains no items

**PO lines** Add PO line

POL number	Title or package name	Product ID	Vendor
msl5413-1	American journal of veterinary research.		

# Organizations



Create/View Organizations and Contacts

Setup admin details

**Organizations** | Users | eHoldings | Agreements | Licenses | **Organizations** | Orders | Codex Search | Settings

Search & filter < | **Organizations** (6 records found) | **New** | **EBSCO** | **Actions** (0)

All | ebsco | **Search** | **Reset all**

**Organizations status**

- Active
- Inactive
- Pending

**Tags**

**Is vendor**

**Country**

**Languages**

**Payment method**

**Acquisitions unit**

Name	Code	Description
EBSCO	ZEBSCO	Monographs vendor
EBSCO	DBEBSCO	Database vendor mransom@ebSCO. (Accounts Receivable, Texas) lwalker@ebSCO.com
EBSCO Books	EBSCO_BK	Continuations vendor
EBSCO Information Services Inc.	ESS	
EBSCO SUBSCRIPTION SERV	SREBSCO	Serials vendor EP@EPNET.COM JMA
GOBI Library Solutions from EBSCO	GOBI	Electronic resources vendor

End of list

**EBSCO** | **Actions** (0)

**Name**: EBSCO | **Code**: DBEBSCO | **Accounting code**: 1234

**Organization status**: Active | **Default language**: en | **Vendor**:

**Acquisition units**

**Description**: Database vendor mransom@ebSCO.com Lena Walker (Accounts Receivable, Texas) lwalker@ebSCO.com

**Alternative names**: The list contains no items

**Contact information**

**Contact people**

**Interface**

**Type**: Admin

**Name**: EBSCOadmin | **URI**: https://eadmin.ebscohost.com/eadmin/login.aspx

**Show credentials**



# Questions?