CORE
Cost of Resource Exchange

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A Work in Progress
Background Thinking

- “COOPTITION*” – *cooperative competition*. “Practice where **competitors** work **with** each other on project-to-project, joint venture, or co-marketing basis.”
  (BusinessDictionary.com (http://www.businessdictionary.com/definition/cooptition.html))

- Opportunity for libraries to be part of the solution

- Vendor interest and participation
What Is CORE?

- Standard to facilitate the extraction and exchange of financial and related data from business systems for use by an Electronic Resource Management System (ERMS)

- Effort to build on the White Paper published by DLF ERMI, Phase 2
  - Norm Medeiros – Haverford College
  - Adam Chandler – Cornell University
  - Linda Miller – Library of Congress
  - Angela Riggio – UCLA
Why Is CORE Needed?

- ERMS customers need access to acquisition information within ERMS
  - Shares rather than duplicates existing workflow data
- Leverages investments in existing systems
  - Acquisition modules continue to be utilized
  - Other business systems in use (SAP, PeopleSoft, etc.)
- Single ILS hegemony is giving way to a multi-vendor environment
- CORE + SUSHI enable the ERMS to more easily calculate a cost per click analysis
Where Will It Lead?

- ‘Holy Grail’ for Resource Management Systems
  - Seeing it in Resolvers and Search applications
  - Management needs the same opportunity

- Interoperability
  - True cross-platform data exchange
  - Allow customers to choose and utilize ERMS
    - Functionality and usability
    - Core competency
    - Workflow

- Integration
  - Allow for the introduction of new services
  - Faster feature development
## Key Benefits to Librarians

- Relieve staff of maintaining multiple duplicate data entry points
  - Align priorities and behaviors with reality
- Reduce labor intensive processes
- Focus on increasing quality of service to patrons
- **Create a true best in class library**
- Bring new and appropriate technologies to staff and patrons
- Allow library to choose an ERM based on their needs and functionality required
# Key Benefits to Vendors

- **Focus on product quality** – no one-to-one solutions
- Import data from multiple sources
  - ILS / LMS
  - Consortia developed management systems
  - Jobbers
- Focus on quality service to customers
- Machine to machine data transfer (**vendor Holy Grail**)
  - Easy
  - Fast
  - Reliable
K.I.S.S.

- **KISS Principle** (Keep It Simple & Sweet)
  - “design simplicity should be a key goal and unnecessary complexity avoided” (http://en.wikipedia.org/wiki/KISS_principle)

- Focus on core data elements common to most ILS and resource management systems

- **Library participation** is CRITICAL !!

- Engage ALL vendors *and* NISO – use existing standards where applicable
  - SRN
  - SOH
  - SPS
  - ONIX
CORE Origins

- Partnership between SirsiDynix and Serials Solutions
- Desire to pull Unicorn Acq. data into VERDE
- DLF ERMI II Subcommittee
DLF ERMI II White Paper

- DLF ERMI II Subcommittee
  - Norm Medeiros, Haverford College
  - Adam Chandler, Cornell University
  - Linda Miller, Library of Congress
  - Angela Riggio, UCLA
- Questionnaire and personal interviews with ERMS and ILS product managers and librarians
- Created whitepaper with suggested elements
A Potential Standard is Born

- Analyzed white paper elements for those most frequently requested from the four libraries
- Queried other ILS and ERMS vendors on which they could supply or would expect
- Clarified data elements and focused on simplicity
- Our Goal: Keep it simple and achievable
### Proposed Data Elements

- Unique Order ID (serves as match point)
- Acq. status and Acq status date
- Fiscal Year
- Budgeted cost, fund code, & currency
- PO Line, PO Note
- Invoice amount (cost), currency, date, number and note
- Subscription start date & end dates and Reference Number
- Vendor name, ID, contact name, address, email & phone
- Selector
<table>
<thead>
<tr>
<th>Other Requested Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Discount</td>
</tr>
<tr>
<td>• Subscription type and type note</td>
</tr>
<tr>
<td>• Renewal or cancellation date, note and vendor note</td>
</tr>
<tr>
<td>• Print cancellation date and note</td>
</tr>
<tr>
<td>• Method of Acquisition</td>
</tr>
<tr>
<td>• Payment dates and instructions</td>
</tr>
<tr>
<td>• Vendor Notes</td>
</tr>
<tr>
<td>• ILS Notes</td>
</tr>
</tbody>
</table>
Some Use Cases

- Request/Response
  - ERMS user initiates request/info dialog appears
  - ERMS user initiates transfer and ILS populates ERMS with CORE data

- ILS “Push” Approach
  - Each time ILS Acq. record is updated, ILS initiates push of CORE data to ERMS
  - Batch push of ILS Acq. CORE data into ERMS
Work Yet to Do

• Complete simple use cases
  • Could drive new data elements
  • Example: Storage in ILS of ERAMS Resource ID
• Create a data element dictionary
  • Clarify all data elements
  • Example: cost = invoice amount + amounts of all supplemental invoice for subscription period
# The CORE roadmap

- Built some use cases (mentioned earlier) but we know there are more

- Had informal contacts with other ILS vendors as well as possible interested parties

- Examined existing possibly relevant standards (ONIX/Serials) for adaptability

- Realized that three guys with a good idea isn’t enough!
NISO involvement

• Wrote a description of CORE and submitted it to NISO as possible work proposal

• Was assigned to NISO Business Information Topic Committee. Had some Q&A on timing and scope.

• B I T C meets Tuesday March 18 to vote whether to accept this as a new work project and set up a standards committee
IF we get the go-ahead

• The NISO committee will:
  • Ask for participation from ERM community
  • Ask for participation from ILS vendors
  • Solicit input from other related business partners (subscription agents, payment services, for example)
  • Encourage input and participation and support from library (user) community
We suggest bifurcating the effort

• Decide upon the payload (that is, the data elements to be transferred) separately from

  *separately from*

• Selecting the means of delivery

They’re not necessarily interdependent.
As mentioned earlier, NISO will

• Identify data elements that all parties can supply: maximize interoperability, increase participation from vendors, better serve customers

• Expand and write additional use cases

• Determine internal XML structure

• Suggest delivery mechanisms
Steps in the process

- Create committee/working group
- Develop and write the draft standard
- Input from interested parties
- Draft Standard for Trial Use (DSFTU) – for testing
- Analysis of DSFTU problems; tweaks to address them
- “Final draft” which is voted on
- Official Standard
Once there’s a standard

- The data exchangers have to implement
- And test
- And deliver, document, support
- Which is where the user community (you!) comes in
Our questions to you:

- Do you perceive a need / use?
- Describe your use cases
- Level of interest?
- Would YOU participate in the standards development process? (work with the committee)
- Will you ask your ILS vendor to support CORE exchange?
Thank You!

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