

# 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](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

# Other Requested Elements

- Discount
- Subscription type and type note
- Renewal or cancellation date, note and vendor note
- Print cancellation date and note
- Method of Acquisition
- Payment dates and instructions
- Vendor Notes
- ILS Notes

# 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:  $\text{cost} = \text{invoice amount} + \text{amounts of all supplemental invoice for subscription period}$

# 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*

- 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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