ERM module in Koha

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Background

- Historically held in paper files, Excel spreadsheets and Access databases!
- Coral/CUFTS - lack of integration
- Project sponsored by PTFS Europe/ByWater Solutions/Biblibre
- Developed by Jonathan Druart
- Turns Koha from an LMS/ILS to a proper LSP (Library Services Platform)
- Most libraries now have at least some e-resources
- MVP added to 22.11

Core functionality (22.11)

- Agreements (including "related" agreements and agreements lines)
- Licences - including the storage of PDFs and other docs
- eHoldings - "resources" - what electronic materials do we hold
  - Integration with EDS HLM (via HoldingsIQ) - bi-directional API that allows you to update or read from EBSCO's KB of millions of titles
  - Local sources - manually create eHoldings records
- First use of Vue.js (JavaScript Framework) in Koha
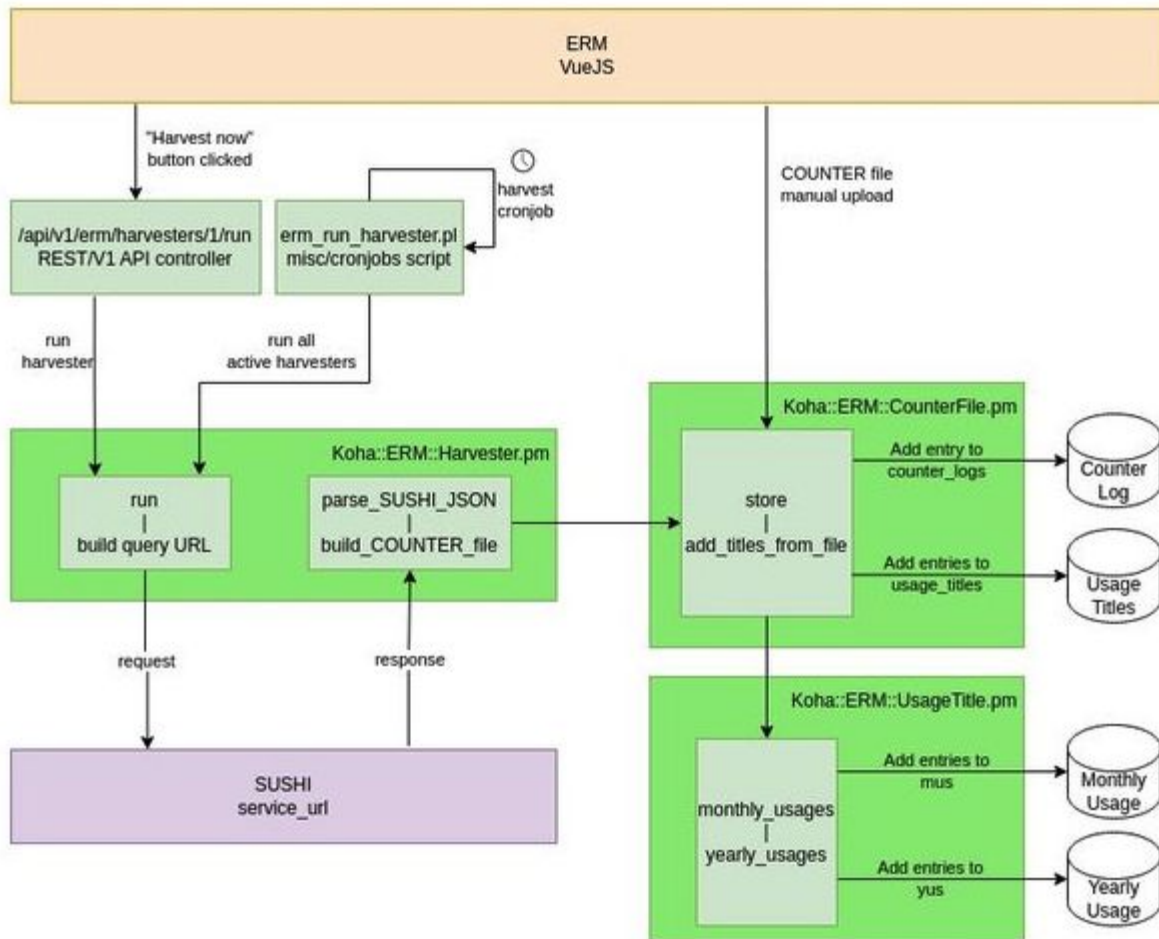
Let's take a look ....

ERM Demo system

What do we do next?

- Cleaning up code
- Fixing a few bugs
- Some links into Acquisitions
- Adding more granular permissions for ERM (Bug 32968)
- Add help link to ERM manual
- Usage Statistics
  - Usage providers
  - SUSHI Harvester
  - Storage of COUNTER files
  - Statistics on monthly and yearly usage (using COUNTER 5)
  - Add a reporting interface for usage statistics

Agreement search   [Enter search keywords   ]   →   ⊘ Search agreements   ▤ Search packages   ↓₂ Search titles

🏠 › *E-resource management* › *eUsage* › *DataProviders*

E-resource management

- ⊘ Agreements
- 🔧 Licenses
- ✧ eHoldings
  - 📍 Local
    - ▤ Packages
    - ↓₂ Titles
- ✧ eUsage
  - ✧ **Data providers**
  - ✧ Reports

+ New data provider

Showing 1 to 1 of 1 entries

Show [20 ▾] entries   « First   ‹ Previous   Next ›   Last » | Search: [   ]   ✖ Clear filter   ⚙ Columns   ⬇ Export   🔧 Configure

Name ▲	Description ⇅	Actions
[Name search]	[Description search]	
Test provider (#2)	A test provider for demo purposes	Run now | ✏Edit | 🗑Delete

Showing 1 to 1 of 1 entries   « First   ‹ Previous   Next ›   Last »

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E-resource management

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- ✧ eUsage
  - ✧ Data providers
  - ✧ Reports

Data provider #2 ✎ 🗑

Detail   Titles   Manual upload   Import logs

Data provider

Data provider name:	Test provider
Description:	A test provider for demo purposes
Status:	Active
Service Type:	test_service_type
Harvest Start:	2022-01-01
Harvest End:	2023-06-01
Report types:	

Sushi credentials

Service URL:	www.test-url.com
Report Release:	test_report_release
Customer Id:	11111
Requestor Id:	22222
API Key:	
Requestor Name:	test_requestor_name
Requestor Email:	test_requestor_email

Close

- ❖ **Platforms**
- ❖ **Reports**

Harvester status: Active ✕ ⌄

Service type: test_service_type

Harvest start date: 01/01/2022

Harvest end date: 06/01/2023

Requestor name: test_requestor_name

Requestor email: test_requestor_email

Report types: TR_J1 - Journal requests (excluding OA_Gold) ✕ ⌃ *Required*

Sushi credentials

PR - Platform master report	
PR_P1 - Platform usage	
DR - Database master report	
DR_D1 - Database search and item usage	
DR_D2 - Database access denied	
TR - Title master report	
TR_B1 - Book requests (excluding OA_Gold)	
TR_B2 - Book access denied	
TR_B3 - Book usage by access type	
TR_J1 - Journal requests (excluding OA_Gold)	

Service URL: *Required*

Report release: *Required*

Customer Id: *Required*

Requestor Id: *Required*

API key: *Required*

Requestor

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- ⬥ eUsage
  - ⬥ Data providers
  - ⬥ Reports

Data provider #2 ✎ 🗑

| Detail | **Titles** | Manual upload | Import logs |

Showing 1 to 20 of 1,294 entries

Show 20 entries   « First   ‹ Previous   Next ›   Last »   Search: [ ]   ✖ Clear filter   ⚙ Columns   ⬇ Export   🔧 Configure

Title ▲	DOI ⇕	Print ISSN ⇕	Online ISSN ⇕	URI ⇕
Title search	DOI search	Print ISSN search	Online ISSN search	URI search
Abacus	10.1111/(ISSN)1467-6281	0001-3072	1467-6281	
Academic Emergency Medicine	10.1111/(ISSN)1553-2712	1069-6563	1553-2712	
Accounting & Finance	10.1111/(ISSN)1467-629X	0810-5391	1467-629X	
Accounting Perspectives	10.1111/(ISSN)1911-3838	1911-382X	1911-3838	
Acta Anaesthesiologica Scandinavica	10.1111/(ISSN)1399-6576	0001-5172	1399-6576	
Acta Neurologica Scandinavica	10.1111/(ISSN)1600-0404	0001-6314	1600-0404	
Acta Obstetricia et Gynecologica Scandinavica	10.1111/(ISSN)1600-0412	0001-6349	1600-0412	
Acta Ophthalmologica	10.1111/(ISSN)1755-3768	1755-375X	1755-3768	
Acta Paediatrica	10.1111/(ISSN)1651-2227	0803-5253	1651-2227	
Acta Physiologica	10.1111/(ISSN)1748-1716	1748-1708	1748-1716	
Acta Psychiatrica Scandinavica	10.1111/(ISSN)1600-0447	0001-690X	1600-0447	
Addiction	10.1111/(ISSN)1360-0443	0965-2140	1360-0443	
Addiction Biology	10.1111/(ISSN)1369-1600	1355-6215	1369-1600	
Adultspan Journal	10.1002/(ISSN)2161-0029	1524-6817	2161-0029	
Advanced Electronic Materials	10.1002/(ISSN)2199-160X	2199-160X	2199-160X	
Advanced Energy Materials	10.1002/(ISSN)1614-6840	1614-6832	1614-6840	

Agreement search   Enter search keywords   →   ⊘ Search agreements   ▤ Search packages   ↓ᴬᵤ Search titles

E-resource management

- ⊘ Agreements
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  - ▾ 📍 Local
    - ▤ Packages
    - ↓ᴬᵤ Titles
- ✛ eUsage
  - ✛ **Data providers**
  - ✛ Reports

Data provider #2 ✎🗑

| Detail | Titles | **Manual upload** | Import logs |

Manual import:

File:
Select a file
[Choose file] No file chosen

Report type: [_____ ▾]

[Submit]   Clear form

Close

Agreement search   Enter search keywords   →   ⊘ Search agreements   📦 Search packages   ↕ Search titles

🏠 › E-resource management › eUsage › DataProviders

E-resource management

➕ New data provider

- ⊘ Agreements
- 🔧 Licenses
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  - 📍 Local
    - 📦 Packages
    - ↕ Titles
- ✥ eUsage
  - ✥ **Data providers**
  - ✥ Reports

Showing 1 to 1 of 1 entries

Show [20 ▾] entries   « First   ‹ Previous   Next ›   Last »   Search: [   ]   ✖ Clear filter   ⚙ Columns   ⬇ Export   🔧 Configure

Name ▲	Description ⇅	Actions
Name search	Description search	
Test provider (#2)	A test provider for demo purposes	Run now ✏Edit 🗑Delete

Showing 1 to 1 of 1 entries   « First   ‹ Previous   Next ›   Last »

...anagement

+ New data provider

Showing 1 to 1 of 1 entries

Show [20 ▾] entries   « First   ‹ Previous   **1**   Next ›   Last »

...ages

Are you sure you want to run the harvester for this data provider?

data provider name

| ✔ Yes, run | ✖ No, do not run |

Name		Run now
Name search	Description search	
data provider name (#1)	data provider description	Run now

Showing 1 to 1 of 1 entries   « First   ‹ Previous   **1**   Next ›   Last »

Agreement search   Enter search keywords   →   ⊘ Search agreements   ▤ Search packages   ↕ Search titles

E-resource management

- ⊘ Agreements
- 🔨 Licenses
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    - ↓ᴬ Titles
- ✧ eUsage
  - ✧ Data providers
  - ✧ **Reports**

Usage Statistics Reports

Build custom report

Monthly or yearly totals?:	Monthly ☒ ▾
Choose data provider:	▾
Choose report:	▾
Start year:	▾
End year:	▾
Start month:	▾
End month:	▾
Title:	▾

Submit

Select default report

Choose report:	▾

Submit

Agreement search | Enter search keywords   → | ⊘ Search agreements   ▤ Search packages   ↕ Search titles

🏠 › *E-resource management* › *eUsage* › *Reports* › View report

E-resource management

- ⊘ Agreements
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    - ↓ Titles
- ⬦ eUsage
  - ⬦ Data providers
  - ⬦ Reports

Showing 1 to 20 of 1,294 entries

Show [20 ▾] entries   « First   ‹ Previous   Next ›   Last »   Search: [_____]   ✖ Clear filter   ⚙ Columns   ⬇ Export   🔧 Configure

Title ▲	Data provider ⇅	Year ⇅	Jan ⇅	Feb ⇅	Mar ⇅	Apr ⇅	May ⇅	Jun ⇅	Jul ⇅	Aug ⇅	Sept ⇅	Oct ⇅	Nov ⇅	Dec ⇅	Metric ⇅
Title search	Data provi	Year se	Jan se	Feb se	Mar se	Apr se	May se	Jun se	Jul se	Aug se	Sept se	Oct se	Nov se	Dec se	Metric search
Abacus	Test provider	2022	3	3	7	0	2	0	1	0	0	0	11	6	Total_Item_Requests
Academic Emergency Medicine	Test provider	2023	18	17	11	13	21	20	28	16	6	11	2	4	Total_Item_Requests
Accounting & Finance	Test provider	2022	2	4	4	13	8	1	0	2	2	1	9	6	Total_Item_Requests
Accounting Perspectives	Test provider	2023	3	1	2	1	3	0	1	0	0	0	0	0	Total_Item_Requests
Acta Anaesthesiologica Scandinavica	Test provider	2022	29	20	19	5	15	4	19	6	5	6	4	0	Total_Item_Requests
Acta Neurologica Scandinavica	Test provider	2022	2	1	2	0	5	0	1	1	0	2	2	0	Total_Item_Requests
Acta Obstetricia et Gynecologica Scandinavica	Test provider	2022	1	0	0	0	0	0	0	0	0	0	0	0	Total_Item_Requests
Acta Ophthalmologica	Test provider	2022	0	0	0	0	0	1	0	1	0	0	0	0	Total_Item_Requests
Acta Paediatrica	Test provider	2022	23	26	14	12	8	45	22	6	10	8	3	9	Total_Item_Requests
Acta Physiologica	Test provider	2022	2	1	0	1	1	8	0	0	0	0	0	0	Total_Item_Requests
Acta Psychiatrica Scandinavica	Test provider	2022	5	9	28	28	15	18	4	1	2	4	13	14	Total_Item_Requests
Addiction	Test	2022	59	19	28	74	46	15	20	14	1	27	24	18	Total_Item_Requests

Add Vendor [Interfaces](#)

Add [Link to Licences]{.underline} in Vendor record

🏠 › *E-resource management* › *Licenses*

E-resource management

- ⊘ **Agreements**
- 🔨 **Licenses**
- ✛ **eHoldings**
  - 📍 **Local**
    - 🏷 **Packages**
  - ↓ᴬᵤ **Titles**

➕ New license

Showing 1 to 1 of 1 entries (filtered from 4 total entries)

Show [20 ⌄] entries   « First   ‹ Previous   Next ›   Last »   Search: [＿＿＿＿＿＿＿]   ✖ Clear filter

Name ▲	Vendor ⇕	Description ⇕	Type ⇕	Status ⇕	Sta
Name search	Oxford University Press ⌄	Description search	⌄	⌄	Sta
OUP (#4)	Oxford University Press	Oxford	alliance	active	

Showing 1 to 1 of 1 entries (filtered from 4 total entries)   « First   ‹ Previous   Next ›   Last »

New ERM [Permissions](#)

| Patrons | Search | ▼ | More ▼ | 🛒 |

Agreement search   Enter search keywords

🏠 › *E-resource management*

E-resource management

♜ Licenses

☐ **Recalls** *(recalls)*

☐ **Manage the electronic resources module** *(erm)*   ⊟ Hide details

☑ Create, edit and delete licenses *(erm_licensing)*

☐ Create, edit and delete all ERM related content *(erm_admin)*

☐ Create, edit and delete agreements. Grants read-only access to licenses and eHoldings *(erm_agreement)*

☐ Create, edit and delete EHoldings local titles and local packages. Grants read-only access to agreements *(erm_eholdings)*

☐ Read-only access for all ERM related content *(erm_show)*

What could it still do?

- Workflow/task management (like Coral)
- Support for other KBs, e.g. GOKb, KB+ (JISC), Swedish Open Access Journals?
- Allocate licence "seats"
- A-Z Journal listing (like Publication Finder) in OPAC
- .... ?

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