# **EBSCO**



"Extensibility and Innovation with FOLIO Open Source and increased library value with PANORAMA"

More than a platform. It's about the people.

5º Encontro BES - Covilhã, July 1st, 2022

**Arturo Rodrigues** *Regional Sales Manager* - Portugal & Western Spain **Tamir Borensztajn** Vice President & Open Strategy – USA **Bernardo Pinheiro** SaaS Innovation Director/Sales, Latin Europe & Israel

#### Current EBSCO FOLIO Sites

The following institutions are currently using either **EBSCO FOLIO ERM** and/or the full FOLIO platform using **EBSCO FOLIO Services**.

#### North America

- Appalachian State University\*
- Cairn University
- California Institute of Technology
- Center for Research Libraries
- Chapman University\*
- Cornell University
- Drew University
- · East Central University
- Five Colleges
- Flagler College
- Georgetown College
- Grand Valley State University
- · Holy Family University
- Lafayette College
- LOUIS-LSU\*
- MacEwan University\*
- Michigan State University & Library of Michigan
- Middle Tennessee State University
- Missouri State University

- Okanagan College
- Roseman University of Health Sciences\*
- Skidmore College
- South College
- · St Thomas University, Florida
- St Vincent College
- · St. Michael's College
- Texas Southmost College
- Truman State University\*
- · University of Alabama
- University of Massachusetts Global (formerly Brandman University)\*
- · University of Missouri Libraries
- University of Tennessee Martin
- Warner University
- · Washington & Jefferson College
- Washington College
- Wellesley College
- Widener University



- Biblioteca Nazionale Centrale di Firenze (Italy)
- Chalmers University (Sweden)
- · Global Banking School (UK)
- Trinity College, Cambridge (UK)
- Universidad de Zaragoza (Spain)

- Università degli Studi di Ferrara\* (Italy)
- Universita di Modena e Reggio Emilia\* (Italy)
- University of Liverpool\* (UK)
- WHU Otto Beisheim School of Management (Germany)

#### Latin America

- · Universidad Adolfo Ibanez (Chile)
- Universidad de Concepción (Chile)
- Universidad Jorge Tadeo Lozano (Colombia)

#### Middle East and Africa

- Durban University of Technology (South Africa)
- Namibia University of Science and Technology (Namibia)

#### Asia

- Jio Institute (India)
- Korea University\* (South Korea)
- National Taiwan Normal University\* (Taiwan)

#### Oceania

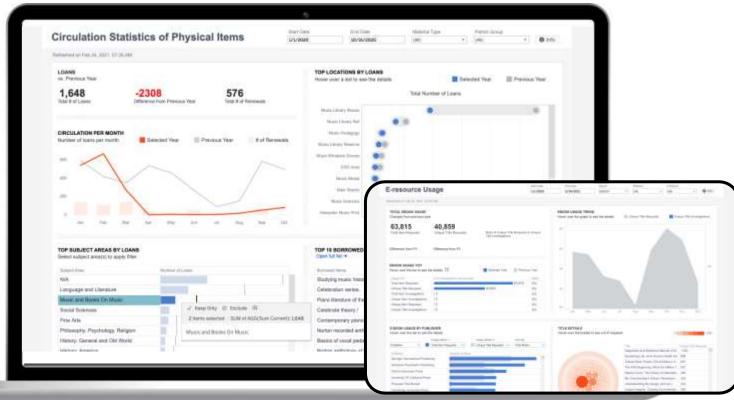
- Massey University (New Zealand)
- · University of Melbourne\* (Australia)



<sup>\*</sup>These sites are currently live on FOLIO's e-Resource Management (ERM) tool only.



Panorama is a next-generation analytics platform, combining data sets from different library and campus systems enabling insights that were not previously possible.







Bernardo M. Pinheiro
Director, SaaS Innovation/Sales, Latin Europe & Israel
EBSCO



Tamir Borensztajn
Vice President of SaaS & Open Strategy
EBSCO

"OSS ...represents a pool of knowledge, which is accessible and usable by all companies and individuals worldwide, and is therefore a public good in its purest form."



2021 study analyses the economic impact of Open Source Software (OSS) and Hardware (OSH) on the European economy

Blind, K.; Böhm, M., Grzegorzewska, P., Katz, A., Muto, S., Pätsch, S., Schubert, T. (2021). The impact of Open Source Software and Hardware on technological independence, competitiveness and innovation in the EU economy, Final Study Report. Brussels

https://op.europa.eu/o/opportal-service/download-handler?identifier=29effe73-2c2c-11ec-bd8e-01aa75ed71a1&format=pdf&language=en&productionSystem=cellar&part=

"Respondents using OSS and contributing code to OSS projects identified supporting open standards and interoperability as generating the highest benefits."

---- Choice

"Case studies reveal that by procuring OSS instead of proprietary software, the public sector could reduce the total cost of ownership, avoid vendor lock-in and thus increase its **digital autonomy**."





Open-source software

| > | 100% |
|---|------|
| > | 90%  |
| > | 80%  |
| > | 70%  |
| > | 60%  |
| > | 50%  |
| > | 40%  |
| > | 30%  |
| > | 20%  |
| > | 10%  |

## Do you support open-source in libraries?

### Open Source in libraries











ReadMETRICS











**ILS functionality & ERM** 

Interoperability

**Extensibility & innovation** 

Circulation, acquisition, cataloging, OPAC, ERM

APIs / integrations

Apps
OSS or proprietary



## Community & collaboration the Open Library Foundation

The Open Library Foundation ensures the availability, accessibility and sustainability of open source and open access projects for and by libraries.

























































Amherst College







MOUNT OLYOKE

Smith College

# Community structure Development & services

#### **Product Council (PC)**

defines the community roadmap

#### **Technical Council (TC)**

an advisory group that helps define best practices

## Special Interest Groups (SIG)

provide subject matter expertise across domains (e.g., circulation, acquisitions, etc.)

#### **Product management**

guides the product roadmap, 'sprint' demos, feature requirements and community development

#### Development

**EBSCO & libraries** 

#### Services

Different organizations provide implementation and support services - so you don't need to hire additional staff

## Access: Open Source as a Service





**Extensibility and Innovation** 

# Open Access in FOLIO Manage end-to-end process for publishing in OA venues

- OA module being developed by K-int in collaboration with Leipzig University
- Supports a wide variety of schemes and mechanisms
- Covers the initial search for a compatible OA funder and/or venue for a scholarly work, follows the full OA lifecycle, and ends with upstream reporting to OA aggregators
- Integrates with institutional directories for author details
- Leverages EU funding





### FOLIO developments



Building an ILL module to connect FOLIO to the British Library.



Have built and contributed a translation app that works in Arabic and other languages that switches FOLIO between languages and R 2 L formatting.



Will build a Chinese ERM app for FOLIO.

## Open standards to make your catalog better and portable Example: extending FOLIO with Library.Link



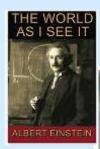
Library.Link is an EBSCO service, based on BIBFRAME, that connects and enriches library resources with open data and publishes resources anywhere on the web.

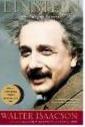
#### Addressing the challenge



### Use

item(s) within the library's catalog







### Connect

- all works by and about an author / researcher / faculty
- works within a genre,
- works about a place, etc.



### **Enrich**

with information about the author / researcher / faculty: alternative names, date of birth, occupation, areas of study, political affiliations, etc.

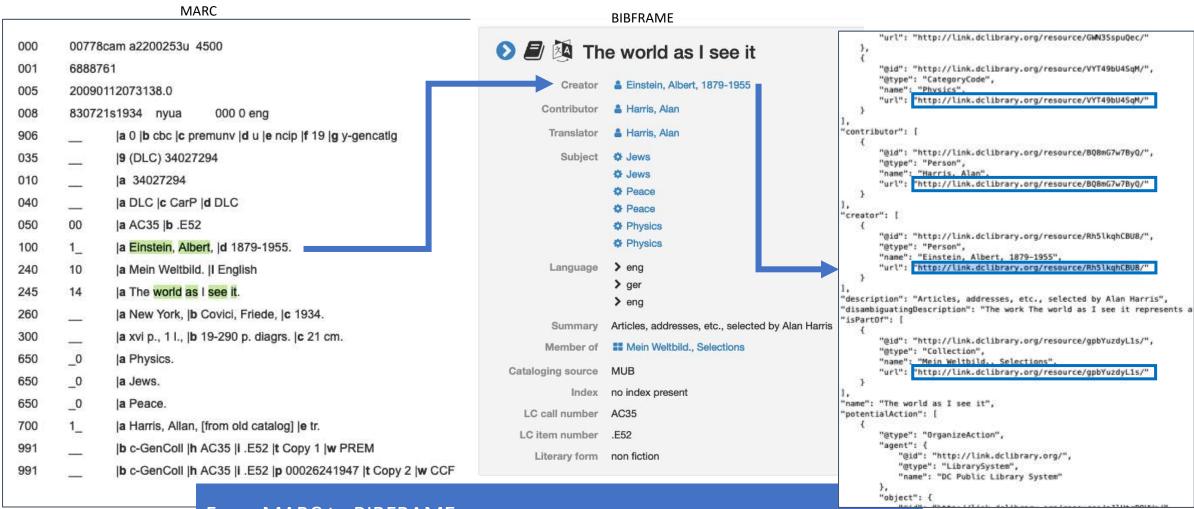


### **Publish**

anywhere on the World Wide Web:

- Learning Management System,
- IR.
- department website,
- And many more

## **Example: creating connected resources with BIBFRAME** Let's look at the Einstein example...

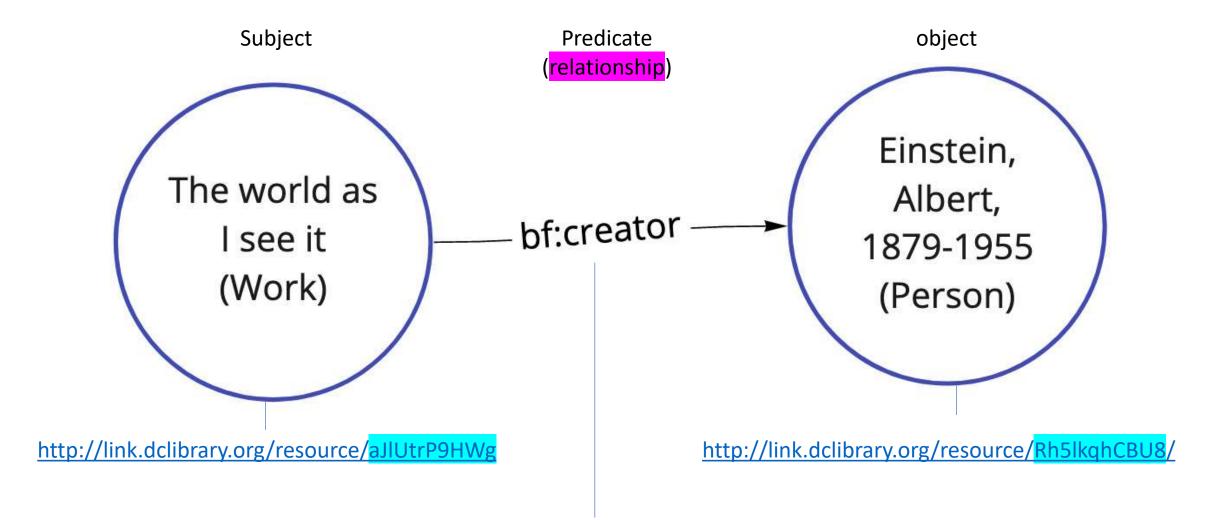


From MARC to BIBFRAME resources.

each resource becomes a link that serves as a unique identifier

### **Example: using BIBFRAME resources to create relationships**

Each resource is a link. The relationship is a link as well.



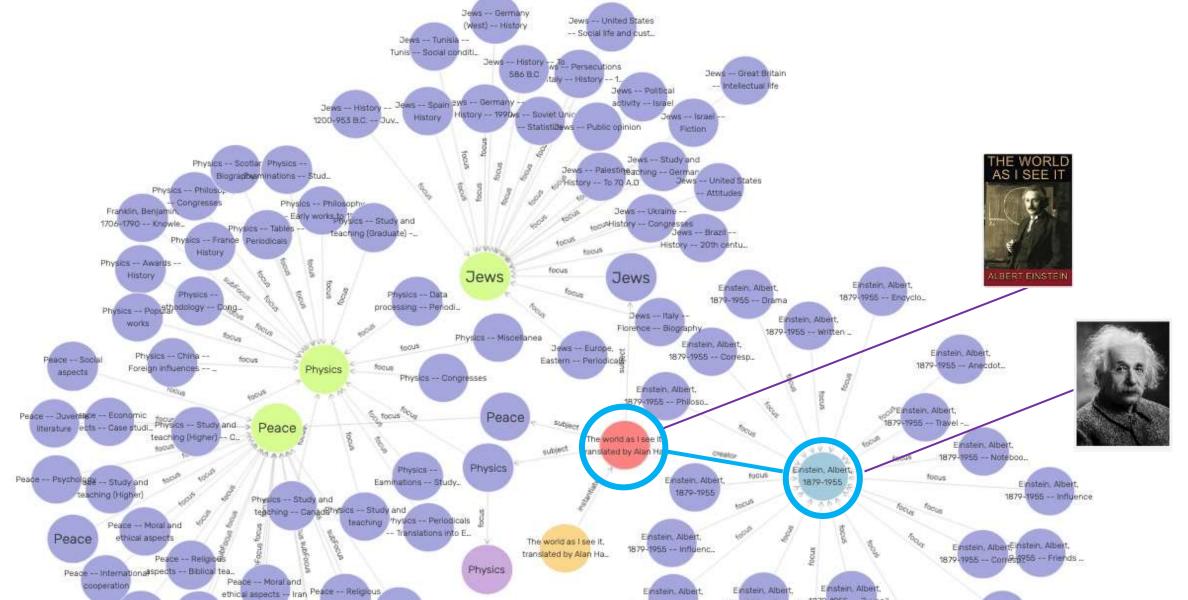
http://bibfra.me/vocab/lite/creator>;

#### **Example: Using BIBFRAME for resource enrichment**

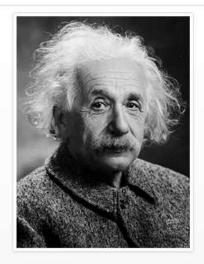
Our service intelligently maps links (local identifiers) to equivalent identifiers in other graphs.

Link Analysis We use these & Einstein, Albert, 1879-1955 Resource Description Namespaces mappings to pull in Local Identifier % http://link.dclibrary.org/resource/Rh5lkqhCBU8/ % http://www.w3.org/2000/01/rdf-schema# additional data **Network Identifier** % http://library.link/resource/Rh5lkqhCBU8/ % http://www.w3.org/1999/02/22-rdf-syntax-ns# about the person, Alternative Identifiers % http://schema.org/ % http://library.link/resource/R5unDpiqiTw % http://purl.org/dc/terms/ item, etc. % http://library.link/resource/7U2AFUyIFPc % http://ogp.me/ **Equivalent Identifiers** % https://www.wikidata.org/wiki/Q937 Example: enriching the Shared in Network Network Analysis 'person' with Inbound Links Currently shared across 680 libraries WikiData. Copy Libraries 40 link(s) based on 4 distinct link type(s) % http://link.tbpl.ca/resource/Rh5lkghCBU8 **Outbound Links** % http://sara-hightower.library.link/resource/Rh5lkqhCBU8 % http://link.library.havering.gov.uk/resource/Rh5lkghCBU8 % http://heyworthelementary.library.link/resource/Rh5lkghCBU8 % http://iennings.library.link/resource/Rh5lkghCBU8

## The Library.Link graph represents data from connected catalogs and other authoritative data sources



🛔 Einstein, Albert, 1879-1955 German-born theoretical physicist; developer of the theory of relativity (1879-1955)



Albert Einstein

German-born theoretical physicist; developer of the theory of relativity (1879-1955)

Name: Albert Einstein

AKA: Einstein, A. Einstein

Born: March 13, 1879 in Ulm

Died: April 17, 1955 in Princeton

Cause of death: Natural causes (Abdominal aortic aneurysm)

Remains: National Museum of Health and Medicine

Occupation(s): Writer, Teacher, Scientist, Professor, Physicist, Inventor, Philosopher examiner, Science writer, University teacher, Theoretical physicist, P

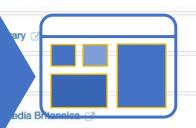
Citizenship: Cisleithania

Gender: Male

Politics: German Democratic Party

Relationships / connections and enrichments can be published on the web and embedded on website.

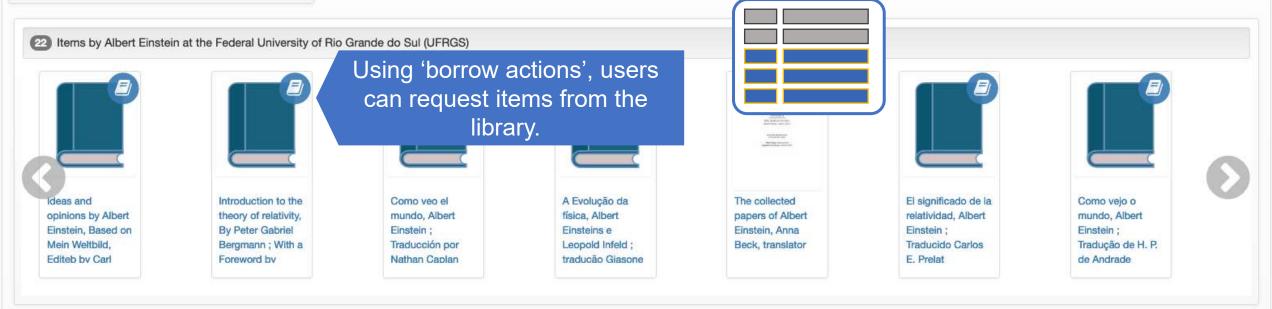
1



Learn more about Albert Einstein at

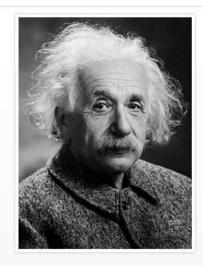
W Wikipedia

Albert Einstein Head



Manage about Albert Finatoin at the Federal Helicopite of Die Counds de Sul / HEDOS

#### Einstein, Albert, 1879-1955 German-born theoretical physicist; developer of the theory of relativity (1879-1955)



#### Albert Einstein

German-born theoretical physicist; developer of the theory of relativity (1879–1955)

Albert Einstein Name: AKA: Einstein, A. Einstein March 13, 1879 in Ulm Born:

Cause of death: Natural causes (Abdominal aortic aneurysm) Remains: National Museum of Health and Medicine

Writer, Teacher, Scientist, Professor, Physicist, Inventor, Philosopher Occupation(s):

examiner, Science writer, University teacher, Theoretical physicist, P Cisleithania

Citizenship: Gender: Male

Died:

Politics: German Democratic Party

April 17, 1955 in Princeton

Relationships / connections and enrichments can be published on the web and embedded on website.

10

Albert Einstein Head





opinions by Albert Einstein, Based on Mein Weltbild. Editeb by Carl

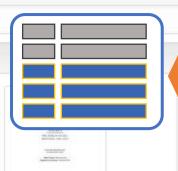


Introduction to the theory of relativity, By Peter Gabriel Bergmann: With a Foreword by

Using 'borrow actions', users can request items from the library.



A Evolução da física, Albert Einsteins e Leopold Infeld: traducão Giasone



The collected papers of Albert Einstein, Anna Beck, translator

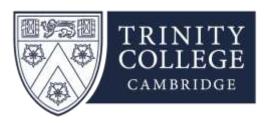
Enrichments can also be sent back to the library's FOLIO catalog and added to the original records.

Learn more about Albert Einstein at

W Wikipedia

El significado de la relatividad, Albert Einstein: Traducido Carlos E. Prelat

Como velo o mundo, Albert Einstein: Tradução de H. P. de Andrade



- Turn their mostly print resource collections into e-resource focused and accessible collections
- Focus the system only on the aspects of library management Trinity required



Migrated from Millennium
Live since June 2021



1000 FTE



300K volumes, 610K bib records



Full FOLIO, HoldingsIQ, EDS



- Vendor-neutral hosted service
- Support for electronic resource management
- Support for EBSCO Discovery Service & Open Athens singlesign-on





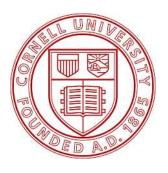
90K items, 60K e-resources



1000 FTE



Full FOLIO, EDS, Open Athens



- Facilitate deep collaboration and move into a new direction
- Avoid single vendor dependency / lock-in
- Support an ever-evolving system that will develop as the library's needs develop
- Start with ERM first, phased approach





8 million volumes, 1.7 million e-books



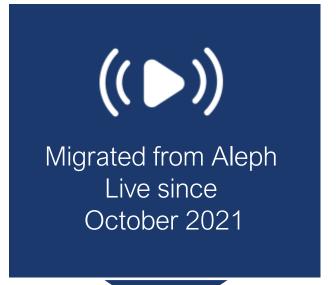
25K FTE



Full FOLIO, EDS, GOBI *ILLiad, financial* systems, archives



- Ensure continuous innovation and support integrations between systems
- Be more adaptable to changes and respond in a timely manner to users' needs
- Modernize the work processes, manage and optimize UdeC Libraries data handling
- Improved support (including local language)





445K volumes, 750K e-holdings



27,5K FTE



Full FOLIO, EDS, Open Athens, integrations





- "e-preferred" strategy, ERM is paramount
- Start with ERM, full FOLIO by end of 2022
- FOLIO as a flexible basis for the development of new service projects at the WHU
- Support of the application and development of new projects by AT-CRIS





30K print books, 120K e-books, 72K eJnls



1800 FTE



Full FOLIO, HoldingsIQ, EDS, FTF, Open Athens







#### Open-source software

OSS provides choice & digital autonomy



- OS LSP
- ILS functionality
- interoperable and extensible



- sustained by the community
- EBSCO, libraries and other organizations
- provides for a choice of service providers

#### **EBSCO Services**

EBSCO FOLIO

Implementation, support and hosting of the FOLIO LSP

Library.Link

Syndication & enrichment of library resources

**ERM** 

**Electronic Resources Management** 

Panorama

Data visualization & analytics

## Panorama<sup>™</sup> Insights Through Analytics

Analytical data for decision-making

#### Panorama Features



A self-service platform for data discovery



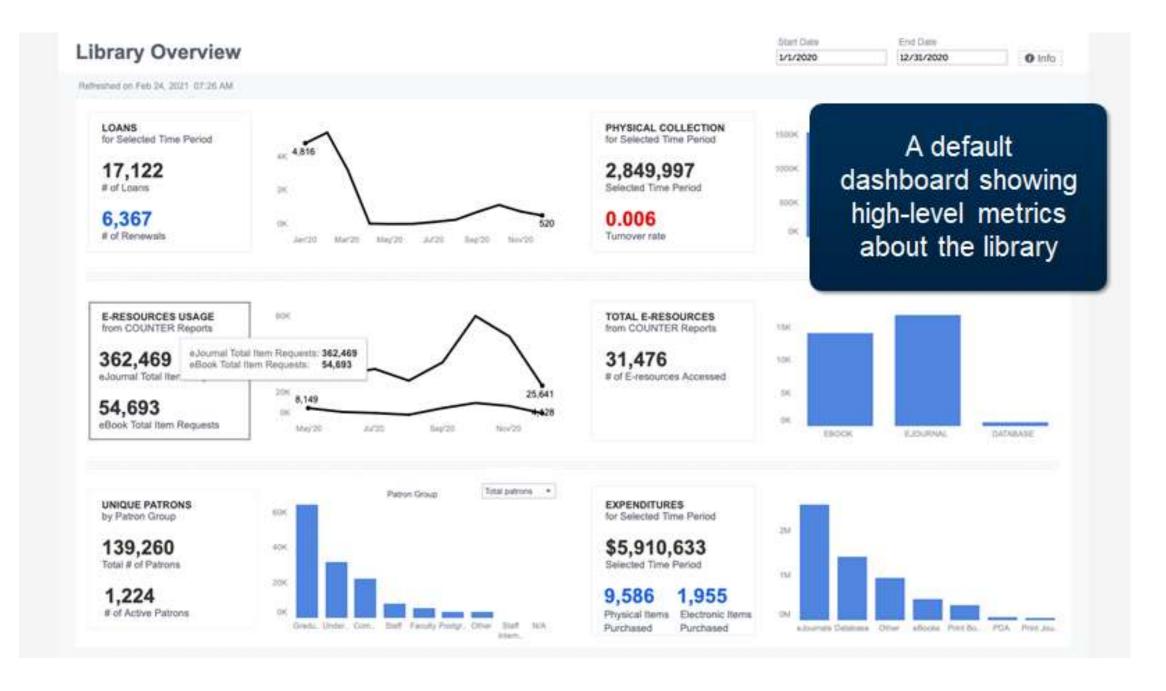
Default and custom visual dashboards

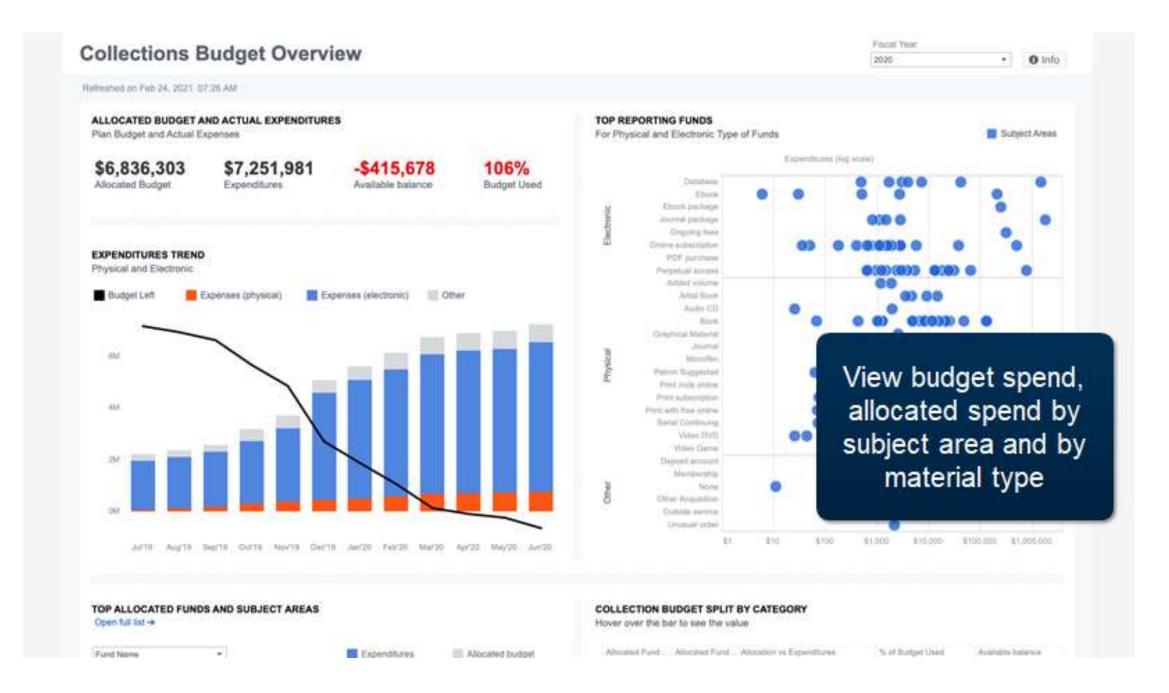


Automated data connections

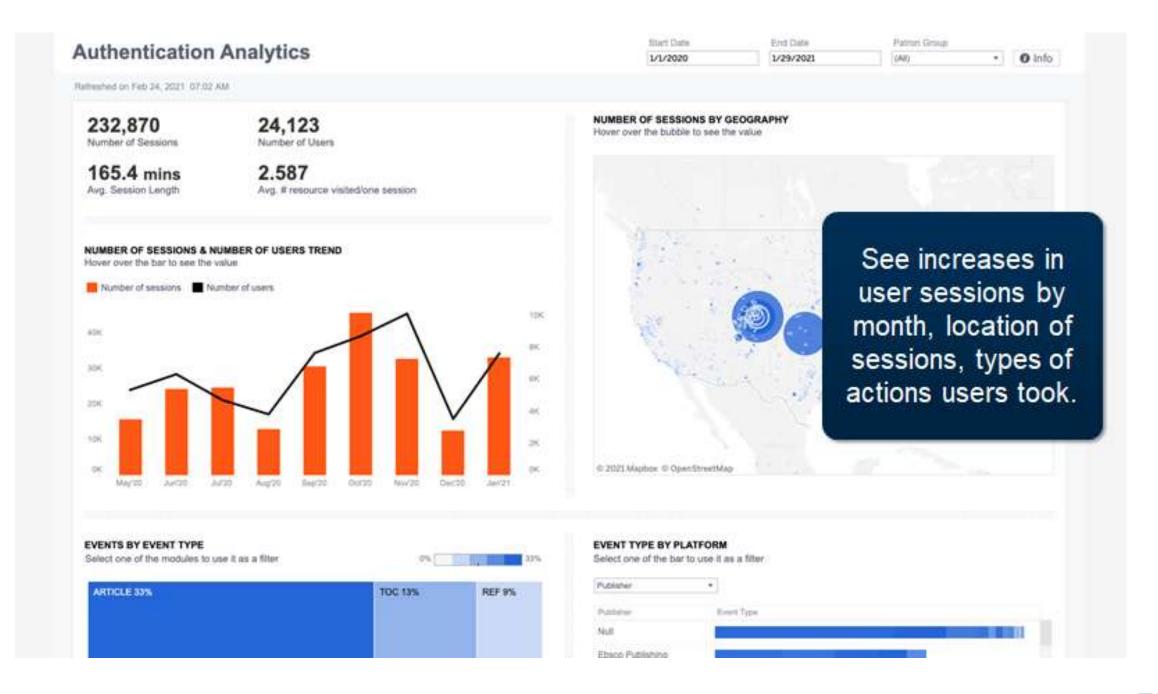


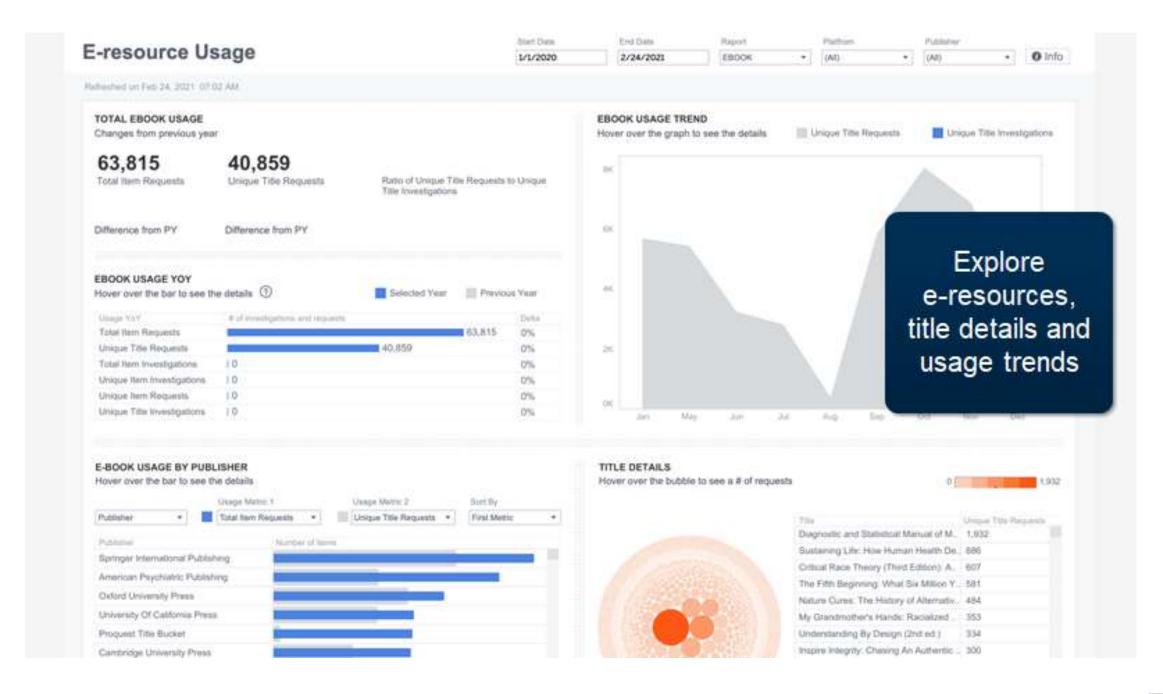
Customizable data sources

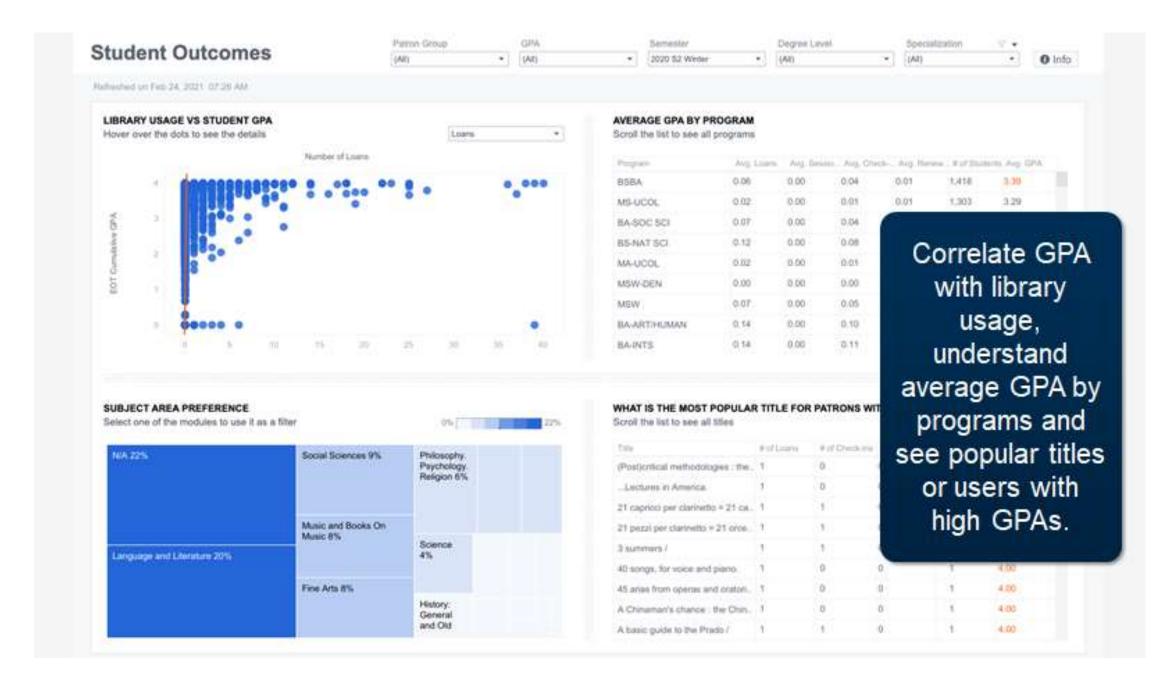


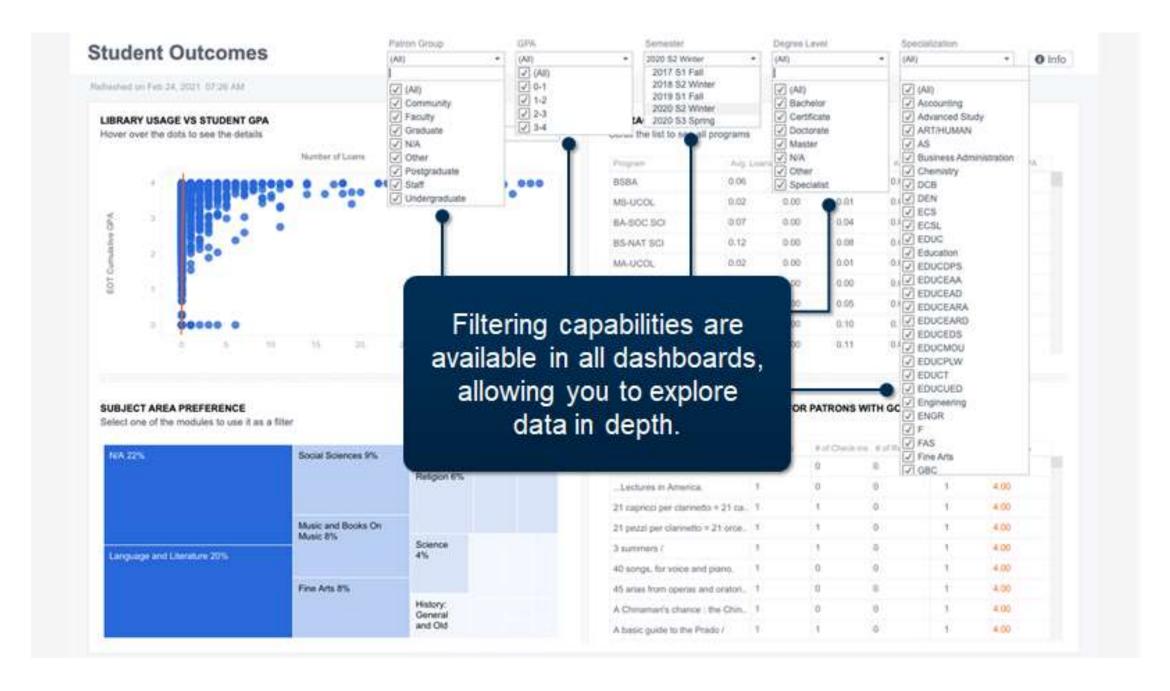


















#### FOLIO apps span domains

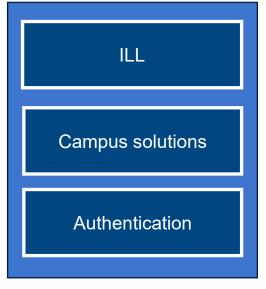
- Circulation,
- Acquisitions,
- e-resources management,
- Etc.

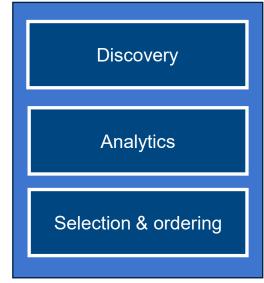


### Open integrations & interoperability: EBSCO and 3<sup>rd</sup> party services





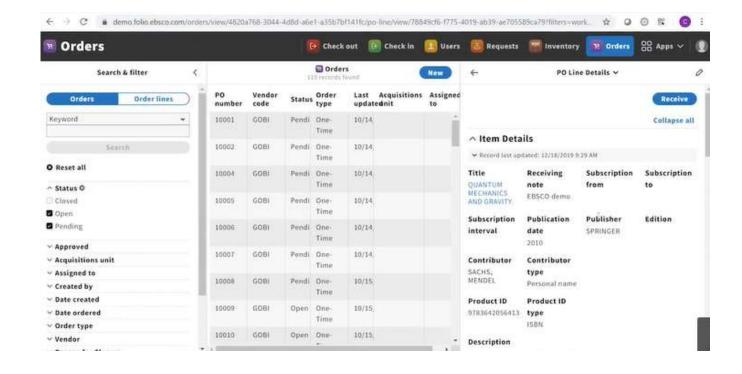




#### Open integrations & interoperability: **FOLIO Services**

FOLIO offers seamless order integration between ILS/LSP and content procurement platforms via "Open" APIs

- Current integrations include **EBSCO GOBI**
- Other integrations possible



Libraries can start with

**Electronic Resource Management** 

then implement the full FOLIO Library Services Platform

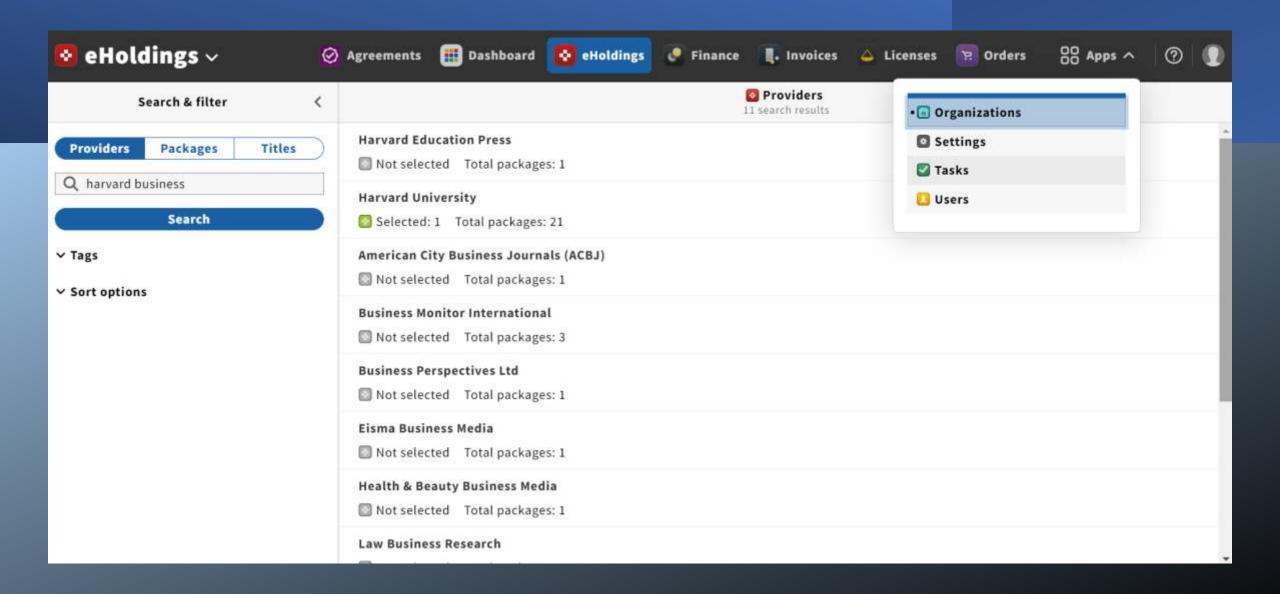
×+

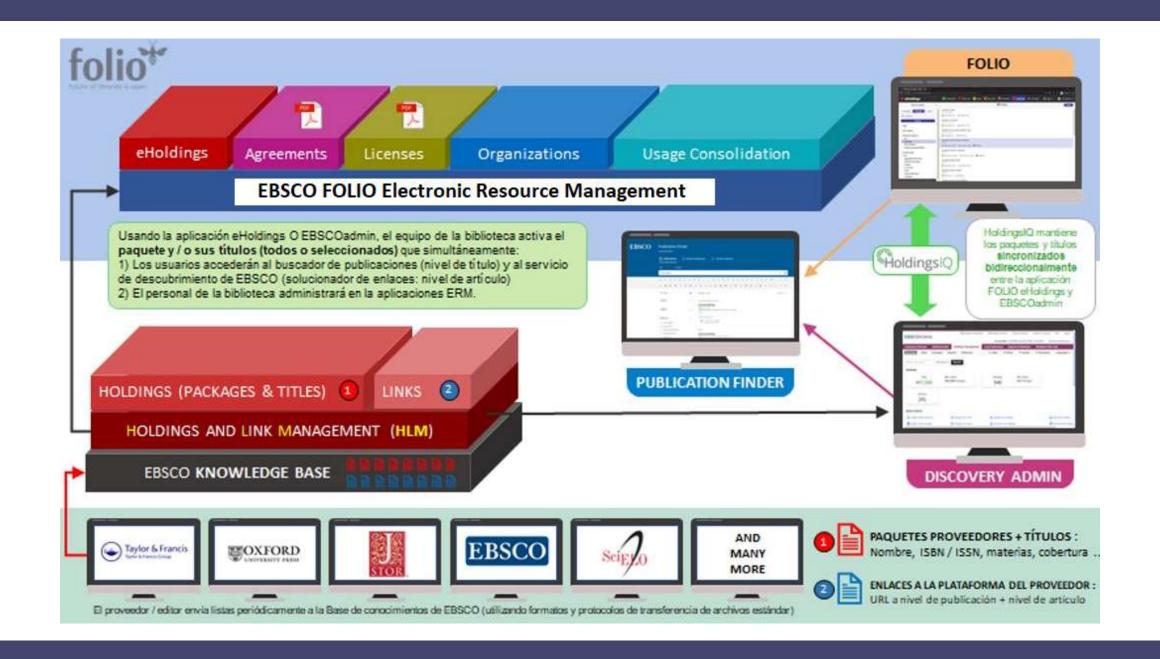
Replace your legacy library system

Supplement your legacy library system

Implement ERM as the first step toward full FOLIO or as way to improve your eresources management

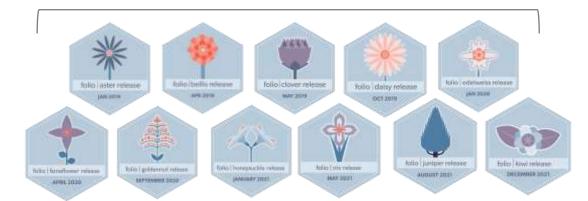
A phased FOLIO implementation





#### FOLIO software releases

#### releases to date



Aster, Bellis, Clover, Daisy, Edelweiss, Fameflower, Goldenrod, Honeysuckle, Iris, Juniper, Kiwi *Jan 2019 – Dec 2021* 

current release



Lotus *Apr 2022* 

upcoming release



Morning Glory

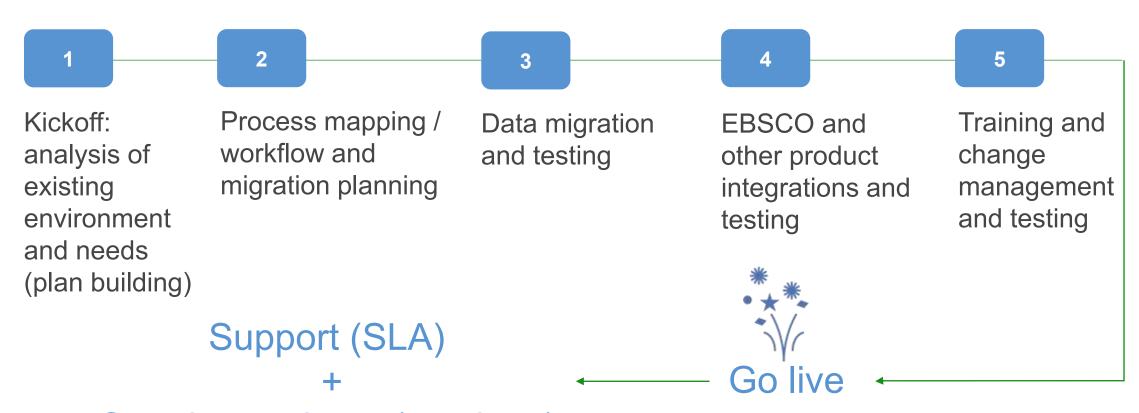
Aug 2022

#### software releases happen regularly

~ 70 features added per release 3 named releases per year

https://wiki.folio.org/display/COMMUNITY/Release+Notes

#### **FOLIO** implementation



Ongoing updates (versions)

# Obrigado! EBSCO