GUGM

May 14, 2024

Gar Sydnor, EVP Research Databases and Library Services, EBSCO
Christopher Holly, Director of SaaS Innovation, EBSCO
FOLIO Momentum Building
with new wave of implementations

“The FOLIO library services platform, based on open source software, has made rapid gains in library implementations. Following a five-year development effort, the major modules of FOLIO are complete and implementations are well underway. These implementations span multiple support arrangements and include large, mid-sized, and small libraries.”

Library Technology Newsletter [July 2022]
by Marshall Breeding

https://librarytechnology.org/document/27574
How many libraries are included?  Count

- In-Process- EBSCO: 112
- Live- EBSCO: 119
- Live- Partners: 10

Developers working on 15 teams
Product Managers, Implementers, Trainers, Support

Customers implemented in last 9 months

Dedicated Support Rep for every EBSCO FOLIO Customer
Adopters and Community
Being part of an open-source community for our first library services platform is a significant move forward that will streamline processes, manage resources and leverage modern technologies. We are eager to collaborate with the FOLIO and Project ReShare communities and hope to contribute to both projects' future developments and to work with our longtime partner EBSCO Information Services to host and implement FOLIO for the consortium.

– Donna Bacon, Executive Director, MOBIUS

Key Highlights

- **62 Libraries moving to FOLIO**
  - Sierra to FOLIO
  - Enhanced Consortial Support

- **81 Libraries moving to OpenRS**
  - all library types

- **Open-Source Orientation**

Missouri, USA
“This move will result in significant savings. As a public institution, we have an obligation to maximize our resources to meet the needs of our users. At Oklahoma State University, we embrace the open movement, and the library is a leader in this regard. We look forward to joining like-minded institutions in adopting this open source solution, and we are eager to contribute to the FOLIO community as we build our own customizations for the platform.”

- Sheila Johnson, Oklahoma State University Dean of Libraries and Clerico Family Chair for Library Excellence
Library of Congress Launches Effort to Transform Collections Management and Access

Release Date: 21 Sep 2022

EBSCO will tailor FOLIO, a community-developed open-source library services solution, to provide a library service platform that meets the Library’s IT requirements and the needs of the Library’s users.

“This is a milestone in our journey to implement a user-centered approach to connecting more people to the Library’s collections,” said Librarian of Congress Carla Hayden. “We are grateful for Congress’ generous investment in this next-generation system that is essential to the Library’s digital-forward strategy, which harnesses technology to bridge geographical divides, expand our reach and enhance our services.”

The platform will replace several legacy IT systems and provide Library staff with new, more efficient tools and workflows to manage continuously growing physical and digital collections at scale. It will offer researchers a streamlined discovery experience and new ways to access high quality metadata. It also will enable the use of BIBFRAME, a new bibliographic description standard being developed by the Library and partner organizations that uses a linked data model to make bibliographic information more useful both within and outside the library community.

Check out the “Library of Congress Plenary Session”
YouTube: WOLFcon 2023 in Chicago
### Poppy Release Highlights - Released in November, customer upgrades started

- **List App & FQM** - Users, Loans, items, instances
- **ECS** - Enhanced Consortia Support (part 1)
- **BIBFRAME** - Thin thread release to test environment and Marva development
- **Authority Control** – Automated heading validation, updates report, record deletion improvements
- **Cataloging** - Call number browsing improvements, relevance sort
- **OAI-PMH & Data export** – Reliability improvements with bad data, reporting on bad data, performance improvements, consortia support
- **Data Import** – File partitioning, multi holding/item support
- **Acquisitions** - Process invoices against previous fiscal years, batch voucher export security improvements
- **Bulk edit** - Discovery suppression, holding record suppression, item notes & improved user permissions

### Quesnelia Release Highlights

- **OpenRS** - Integration for DCB
- **List App & FQM** - organizations contacts & vendors, purchase orders, purchase order lines, holdings
- **ECS** - part 2, for MOBIUS
- **BIBFRAME** – Linked data import to inventory, launch bibliographic knowledge graph, search/browse linked data, export to MARC, MARVA editor integration
- **Inn-Reach integration** – III certification, GVSU will be live April 8th
- **Circulation** - Profile photos
- **Cataloging** - Searching, Browsing & Authority improvements. LCCN validation, MARC record validation (phase 1)
- **Data export** – Slices large exports into multiple files
- **Acquisitions** – Banking & donor info, fund restrictions by location, independent ACQ units for ordering and receiving, serials publication patterns

Ramsons development has started...
FOLIO Milestones

*Revised Oct 2019

Aster: early Beta
- Early versions of core features
- Orders & Vendors
- Circulations
- Inventory
- Patron management
- License, contracts & Package management
- Usage Statistics

Bellis: 1st Library Beta
- Core feature focus
- Cataloging
- Discovery Interoperability
- Import
- Orders & Receiving
- Usage Stats

Clover: 1st Library Release
- 1st library roll out
- Stabilization, Performance, Defects
- Continue work on:
  - Invoicing & Funds
  - Add
  - Additional Import features
  - External integrations

Daisy: Early adopter dev
- Circulation advanced features
- Acquisitions
- License, contracts & Package management
- External integrations
- Batch Operations
- Reporting & Analytics
- Migration tools

Edelweiss: Early adopter Beta 1
- Focus on next libraries
- Stabilization, Performance & Defects
- Integrations
- Reporting & Analytics
- Migration tools
- Metadata export
- Multi-tenant Consortia Features

Frameflower: Beta 2
- Feature improvements
- Stability, Performance & Defects
- Migration tools
- Metadata export
- Multi-tenant Consortia Features

Goldenrod: General release
- Advanced features (TBD)
Open Source means....

OPEN INNOVATION
Open innovation means choice of vendors and applications

MICROSERVICES ARCHITECTURE
Microservices architecture means easier to develop and innovate

VIBRANT ECOSYSTEM
Vibrant ecosystem means many participants
“Close relationships, more than money or fame or [career], are what keep people happy throughout their lives.”

Not all technological advances equal innovation.

“We wanted flying cars, instead we got 140 characters.”

*Peter Thiel, 2013*
The Capacitor Plague

A $1,499.00 Problem that needed a...

a $.04 Solution
FOLIO
What we’re excited about!
The Future Platform Core

**AuthN/Z**
- mod-login-keycloak
- mod-roles-keycloak
- mod-users-keycloak

**Module Sidecars**
- Tenant
- Directory
- Discovery
- Application Manager
- Tenant Manager
- Tenant Entitlement Manager
- Entitlement
- TenantPermissions
- Timer
- mod-scheduler
- mod-configuration
- mod-users

**Gateway**
- Kong
- Metrics
- Proxy
- Filters (?)
- Caching (?)

**Env**
- Deployment
Enhanced Consortial Support (ECS)

A New Consortial Architecture

Local Tenants per Member Library

FOLIO has multiple ways to handle library consortia
### New Lists App!

<table>
<thead>
<tr>
<th>List name</th>
<th>Record type</th>
<th>Records</th>
<th>Status</th>
<th>Source</th>
<th>Last updated</th>
<th>Visibility</th>
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<tr>
<td>Open Loans due prior to August 1, 2023</td>
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<td>0</td>
<td>Active</td>
<td>admin, admin</td>
<td>7/12/2023 3:16 PM</td>
<td>Shared</td>
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</table>
Evolution and Transition: EBSCO Research Services & A Focus on the Future
Building a new Query for Item Record data, the available fields AND data are relevant fields from within Item Records, Holdings Record and Inventory Instance Records.
## List information

- **List name**: Expired Patron Loan
- **Description**: Expired Patron Loan List
- **Visibility**: Shared
- **Status**: Active
- **Source**: System

**Query**: (loan_status == Open) AND (user_active == false)

### 1,121 records found

<table>
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<tr>
<th>User full name</th>
<th>User barcode</th>
<th>User expiration date</th>
<th>User patron group</th>
<th>Loan due date</th>
<th>Instance title</th>
<th>Item status</th>
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<tr>
<td>Arend, Chris</td>
<td>0000036260</td>
<td>2023-04-01T19:59:59.000+00:00</td>
<td>Alum, Quarter 25</td>
<td>2021-11-28T11:48:38.000+00:00</td>
<td>Grundzüge des Eisenbetonbaus von Otto Henkel</td>
<td>Aged to lost</td>
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</table>

<table>
<thead>
<tr>
<th>User full name</th>
<th>User barcode</th>
<th>User expiration date</th>
<th>User patron group</th>
<th>Loan due date</th>
<th>Instance title</th>
<th>Item status</th>
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<tbody>
<tr>
<td>Arend, Chris</td>
<td>0000036260</td>
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<td>Alum, Quarter 25</td>
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</tbody>
</table>

**Item barcode**: 480380061
## Lists

### Status
- **Active**
- **Inactive**

### Visibility
- **Shared**
- **Private**

### Record types
- **Holdings**
- **Instances**
- **Items**
- **Loans**
- **Organizations — contact info**
- **Organizations — vendor info**
- **Purchase order lines**
- **Users**

### List Details

<table>
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<tr>
<th>List name</th>
<th>Record type</th>
<th>Records</th>
<th>Status</th>
<th>Source</th>
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<td>Inactive patrons with open loans</td>
<td>Loans</td>
<td>0</td>
<td>Active</td>
<td>System</td>
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<tr>
<td>Missing items</td>
<td>Items</td>
<td>0</td>
<td>Active</td>
<td>System</td>
<td></td>
</tr>
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<td>testpo</td>
<td>Purchase order lines</td>
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<td>Active</td>
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Open Access SIG

<table>
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<tr>
<th>Name</th>
<th>Focus of Work</th>
<th>Organization / Job Title</th>
<th>OA Project Role</th>
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</thead>
<tbody>
<tr>
<td>Owen Stephens</td>
<td>Product Owner Agreements, Licenses, and Open Access business functionalities</td>
<td><a href="http://www.oastephens.com/">http://www.oastephens.com/</a></td>
<td>Product Owner</td>
</tr>
<tr>
<td>Ian Ibbotson (Use this one)</td>
<td>Development Lead of Agreements, Licenses, and Open Access business functionalities</td>
<td><a href="https://www.uk-lst.com">https://www.uk-lst.com</a></td>
<td>Dev Lead</td>
</tr>
<tr>
<td>Gill Cieguthorpe</td>
<td>UX/UI Designer Agreements, Licenses, and Open Access business functionalities</td>
<td><a href="https://www.uk-lst.com">https://www.uk-lst.com</a></td>
<td>UX/UI Lead</td>
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<tr>
<td>Björn Muschall</td>
<td>Digital Services, Application management; Local Folio implementation lead</td>
<td>Leipzig University Library, Deputy Head Digital Services</td>
<td>Convenor, Project Manager</td>
</tr>
<tr>
<td>Martin Bauschmann</td>
<td>Open Access Manager</td>
<td>Leipzig University Library</td>
<td>Subject Matter Expert</td>
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<tr>
<td>Björn Muschall</td>
<td>Digital Services, Application management; Local Folio implementation lead</td>
<td>Leipzig University Library, Deputy Head Digital Services</td>
<td>Convenor, Project Manager</td>
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<td>Martin Bauschmann</td>
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<td>Christina Proll</td>
<td>Open Access Manager</td>
<td>University Library of Regensburg</td>
<td>Subject Matter Expert</td>
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<tr>
<td>Peter Sbrzesny</td>
<td>Systems Librarian, ACQ SIG member</td>
<td>VZG - Headquarter of Common Library Network (GgW)</td>
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<td>Peter McCracken</td>
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<td>Cornell University</td>
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<tr>
<td>Jasmin Heuer</td>
<td>Open Access Team Member</td>
<td>Goethe University Frankfurt Library</td>
<td>Subject Matter</td>
</tr>
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New Open Access App for FOLIO

Request number: oa-00000001-7
Request date: 4/30/2024
Status: Closed
Publication title: Evaluation of an inertial measurement unit (IMU) based tracking system for monitoring physical demands in German junior female and male national handball players: agreement with an established local positioning system and application during training.
Linked Data App

Product roadmap

**ALPHA**
MAY 2024
Focus on linked data app and basic workflows for monograph cataloging
- Create / Edit Work
- Create / Edit Instance
- Search / search results
- Preview

**BETA**
SEP 2024
Focus on interoperability with FOLIO platform
- Data governance
- Synchronization w/Inventory
- Synchronization w/SRS

**RAMSONS**
NOV 2024
TBD; focus on upgrading infrastructure to support linked data
eReserve Plus in the EBSCO Ecosystem

GOBI Library Solutions

EBSCO Discovery Service

licences

resource metadata

resource availability

discovery

acquisitions

analytics

EBSCO | folio
Works with all Library & Learning Systems

library and copyright staff

students

faculty

EBSCO

Library System
FOLIO Roadmap Dashboards

https://folio-org.atlassian.net/jira/dashboards
Key BiblioGraph Linked Data Functionality

- Transform MARC to create linked data
- Curate collections and ‘living lists’ of items
- Enrich resources with data from authoritative sources
- Drive more usage of the library’s catalog from anywhere on the Web
- Show up as an option in Google Search
- Join an expanding network of trusted library metadata
Bibliograph Project Status

- UGA and Georgia Gwinnett College
- Tips & Tricks Videos Coming
- Data Updated Monthly
- Last Refresh Date on “Types” page
Populating Subject Guides

updated with each refresh or custom with ISBN

• It can be in reference to a person, topic, subject
• Example: Black Authors

(each tab has the authors full collection held at the library)
Mixes for your Subject Guides

Art example at GGC
Embeds to Enhance LibGuide topics or Site Visuals

GGC example
• We want to help each librarian tell their story
• Visual dashboards with reporting tools useful within and outside the library
• Show the value of the library to larger institution
Panorama gives you time to make good decisions

Without Panorama
- Analysis requested
- Harvest data
- Manipulate data
- Analyse data
- Report

With Panorama
- Analysis requested
- Analysis requested
- Analysis requested
- Analyse data
- Report
- Report
A default dashboard showing high-level metrics about the library.
View budget spend, allocated spend by subject area and by material type
Explore e-resources, title details and usage trends.
Drill down into subject areas by loans, top loan locations and top borrowed items.
Panorama Implementations

July 1 Deliverables:
• 17 Institutions completed
  • Alma
  • Alma Counter
  • EDS
  • LibGuides, LibCal, & LibAnswers (variations)
  • Tipasa, Worldshare ILL, or ILLiad
• 7 Institutions’ deliverables will be completed by June 9

Acceptance testing:
• 14 institutions completed
• 7 institutions in progress and to be completed May 21
• 7 institutions start June 10

Note: All Critical and High Priority issues are being resolved as part of Implementation completion.
<table>
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<tr>
<th>Site</th>
<th>LibCal</th>
<th>LibGuides</th>
<th>LibAnswers FAQ</th>
<th>LibAnswers RefAnalytics</th>
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**Legend:**
- **WS**: WesCat
- **Iliiad**: Iliad
- **Tipasa**: Tipasa
- **NA**: Not Applicable
Course reserves

Browse by department

Browse by instructor

Name

Ruijie Liu

Chris Pearl

Martin Burg
Locate Development Roadmap

Locate’s Development Roadmap reflects our vision of providing the best catalog discovery experience for FOLIO’s partner libraries.

Current Development Priorities
• Functionality to support users of the Library of Congress and academic libraries
• Functionality to support lending between members of consortia (OpenRS Union Catalog)
• Replacement of authorities.loc.gov

Examples of development in progress:
• Additional metadata display on record detail context
• Initial UI work for the enhanced bookshelf and bookmark organization
• Support for storing recent items/recent searches, saved items/saved searches
• Security/compliance work for user authentication
# Recent UX Research and Design Priorities

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<th>Section</th>
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<tbody>
<tr>
<td>Search Results</td>
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<td>Search</td>
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<td>Detail Page</td>
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<td>Dashboard/Personalized Tools</td>
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<td>Browse</td>
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<td>Authorities</td>
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<td>Contextual Help</td>
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<td>Consortia Support</td>
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<td>Patron Registration / Authentication</td>
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<td>Authorities Discovery (authorities.loc.gov)</td>
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<td>Technical Enablers (API architecture)</td>
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<td>Core Workflow Improvements</td>
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Locate Development Tracks

Core Workflow Improvements: Search Functionality

Basic Search:

• Discovery SMEs are reviewing which metadata fields need to be added to Locate’s basic search functionality. We expect to make significant additions to the basic search, including various identifiers, notes, place of publication fields, and title fields.

• Most of the MARC fields that have been identified are currently mapped to FOLIO Inventory, where Locate pulls our data, lowering the level of effort for this work.

• Additional support for Boolean operators
Locate Development Tracks

Core Workflow Improvements: Search Functionality

Advanced Search:

- Update to search types: (Keyword, Title, Author/creator, Identifiers, Subjects, Names)
- Additional search limiters including date range, source type, language, place of publication, location
- Search logic updates/refinements to the indexing of various searches
Locate Development Tracks

Core Workflow Improvements: Result List

Result Card:

- Updates to expose additional metadata
- Additional hyperlinks to enhance search opportunities

Book

The Lord of the Rings

By: Tolkien, J. R. R. (John Ronald Reuel), 1892-1973
Published: Boston; Houghton Mifflin, c1965-
Edition: 50th anniversary one-volume ed.
Genre: Fantasy fiction
Subjects: Baggins, Frodo -- Fiction; Middle Earth (Imaginary place) -- Fiction; Fantasy fiction, English
An extensive overhaul of the record detail page is underway to better meet user and staff needs:

- Substantial additions to the metadata displayed on the detail page to support the workflows of patrons and reference librarians, including descriptors, identifiers, access information and notes.
- Reorganization of metadata to move fields most likely to be used by patrons closer to the top of the page.
Locate Development Tracks

Core Workflow Improvements: Patron tools

New tools for patrons

- Citation generation
- Saved searches
- Activity history
- Send emails
Locate Development Tracks

Core Workflow Improvements: Browsing

Call number browse improvements

- Filter for LCCN
- More emphasis on exact matches
- Location information on browse list

![Image of call number browse interface](image-url)
Locate Development Tracks

Core Workflow Improvements: Browsing

Subject browse

- New Locate functionality
- Continuing to refine the experience to account for the depth and breadth of various thesauri

Title browse

- New Locate functionality
- Critical for Reference/Reading Room workflows
OpenRS - Direct Consortial Borrowing

What is it?
A new platform-agnostic FOLIO application that provides patron-initiated request and delivery of resources seamlessly between libraries in a network using FOLIO's (and other ILS's) circulation interface.

Who can use it?
Any Consortium regardless of ILS

What features for CY24?
• Union Catalog
• Automated harvesting of catalogs
• Patron authentication and eligibility/pickup rules
• Item selection and messaging
• Standard circulation capabilities (hold, loan, cancel, renew)
• Supports FOLIO, Sierra, Polaris, Alma-CY25

High first-to-fill rate (90 – 95%)
Fast turnaround (2–3 days)
Low total cost ($1–2 per transaction)
Platform agnostic
Directly integrates into existing ILS capabilities
Most importantly, very high levels of customer satisfaction
# Direct Consortial Borrowing vs. Traditional Resource Sharing

<table>
<thead>
<tr>
<th>Direct Consortial Borrowing</th>
<th>Traditional Resource Sharing</th>
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<tbody>
<tr>
<td>Accommodates mediated and unmediated resource sharing</td>
<td>Requires mediation by library staff</td>
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<tr>
<td>Uses typical ILS workflows (circulation functionality)</td>
<td>Uses specialized workflows/ specialized requirements</td>
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<td>Detailed configuration leads to quick delivery and first-to-fill times</td>
<td>Quick configuration, slow fill times</td>
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<tr>
<td>Integrates with multiple ILSs and discovery platforms</td>
<td>Standalone interface</td>
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<td>Users search and request using a central index that provides access to the shared holdings of all participating institutions of a consortium</td>
<td>Users make local requests that go through the interlibrary-loan office at their institution</td>
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</table>
MOBIUS will be the first consortium in the world to go live with OpenRS for use with returnables.

- This manifests as direct consortial borrowing, allowing MOBIUS libraries to accommodate interlibrary requests within MOBIUS, across different systems, as part of local circulation workflows.

OpenRS is designed to minimize staff burden when responding to interlibrary requests within MOBIUS.

- OpenRS leverages local circulation rules and record attributes to ensure expected circulation behavior within the local ILS.
Thank You!

Gar Sydnor, EVP Research Databases and Library Services, EBSCO
Christopher Holly, Director of SaaS Innovation, EBSCO