

EBSCO

全国智慧图书馆平台联盟成立暨长三角智慧阅读会议

FOLIO Updates: the Global Trend and Latest Developments of Open-Source Library Services Platform

April 23

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EBSCO Information Services

什么是 FOLIO?



FOLIO 是下一代开源图书馆服务平台，由EBSCO以及全球合作伙伴提供支持。

什么是 FOLIO

- FOLIO是一个全新的图书馆服务平台;10年来第一个新的LSP
- 整合纸本资源和电子资源管理；包括来自第三方提供商的应用程序
- FOLIO 搭建在现代架构之上，以确保持续的创新
- FOLIO 功能由您的图书馆同行设计
- 开放图书馆基金会（OLF）

Open
Library
FOUNDATION

folio 
future of libraries is open



Global Trend

全球趋势



Library Perceptions 2021: Results of the 14th International Survey of Library Automation

2021年图书馆洞察报告：第14次国际图书馆自动化调查的结果

by Marshall Breeding, March 31, 2021.

Library Perceptions 2021: Results of the 14th International Survey of Library Automation

select

by Marshall Breeding, March 31, 2021.

“Though not yet implemented widely enough to gauge satisfaction, migration intentions suggest FOLIO as Alma’s strongest competition going forward”

“虽然尚未广泛实施以衡量满意度，但有意更换系统的意向表明，FOLIO是Alma未来最激烈的竞争”

Survey results show... for Alma among academic libraries generally respectable... strong loyalty scores, and top placement among migration intentions among libraries planning a change from legacy systems. Though not yet implemented widely enough to gauge

libraries continue their ongoing processes. System migrations planned or underway generally moved forward,



“The decline of legacy products accelerates...Awareness of the FOLIO library services platform continues to increase with 88 libraries mentioning it among their migration candidates”

“传统产品的衰退加速了...对 FOLIO 图书馆服务平台的认识继续提高，88 家图书馆在其迁移候选者中提到该平台”

FOLIO rather than... library sector, the... of libraries moving from legacy products will shape the next phase of implementations of the current flagship products.

Statistical ratings and narrative comments given in survey responses fill in details surrounding the broader events in the



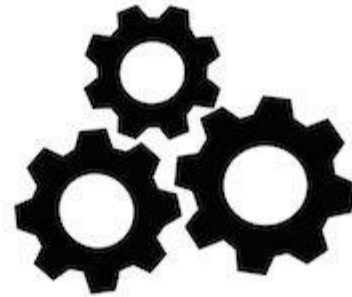
F
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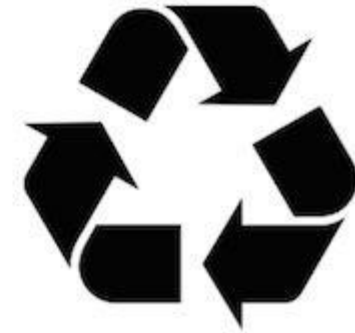
A
ccessible



I
nteroperable



R
eusable



Source: <https://www.panosc.eu/data/fair-principles/>

Latest Developments: the community

最新发展：社区

实施 EBSCO FOLIO 的图书馆



已经上线

- Full

- 瑞典查尔姆斯理工大学 – Sep 2019
- 美国密苏里州立大学 – Jun 2020

- ERM First

- 美国康奈尔大学 – Jul 2020
- 美国麻省大学五校联盟 – Jul 2020

- ERM Only

- 美国威得恩大学 – Feb 2021
- 英国利物浦大学 – Mar 2021
- 美国查普曼大学 – Apr 2021

实施 EBSCO FOLIO 的图书馆

实施中与即将上线 2021

APRIL 2021 ERM Only Go-Live

Brandman University
MacEwan University
Universita di Modena e Reggio Emilia
Università degli Studi di Ferrara
Roseman University

MAY 2021 FULL FOLIO Go-Live

Skidmore College
Okanagan College

MAY 2021 ERM First Go-Live

Lafayette College

JUNE 2021 FULL FOLIO Go-Live

Grand Valley State University
Trinity College, Cambridge
Flagler College
Universidad de Concepción
University of Tennessee Martin

JUNE 2021 ERM First Go-Live

Villanova University

JUNE 2021 ERM-Only

LOUIS- Louisiana State University

JULY 2021 FULL FOLIO Go-Live

Cornell University
Middle Tennessee State University
Michigan State University & Library of Michigan
St. Michael's College
JIO

August 2021 FULL FOLIO

California Institution of Technology

August 2021 ERM-Only

Truman State University

Beyond – Go-live dates unconfirmed

University of Alabama
Five Colleges



目前已有 40+ 家图书馆已实施/正在实施 EBSCO FOLIO

FOLIO 是一个由许多不同类型图书馆组成的全球社区

Libraries Worldwide



FOLIO Community Council 社区理事会

最初成立于 2021 年 3 月，有以下章程

- 为 *FOLIO* 项目培养健康、高效的社区生态系统、政策和协作。
- 它扮演两个关键角色
 - 第一，确保社区强大健康，包括招聘、营销和许多面向外部的活动
 - 第二，此理事会负责社区活动的顺利进行，包括与其他理事会协调，并确保社区具有协作性和包容性
- 它是 *FOLIO* 项目中级别最高的组织机构。

Community Council Members 社区理事会成员 - FY22

- Kathleen (Kat) Berry - UMass (5 Colleges)
- Rachel Besara - Missouri State University
- Tom Cramer - Stanford University
- Mike Gorrell - Index Data
- Dracine Hodges - Duke University
- Ian Ibbotson - Knowledge Integration
- Harry Kaplanian - EBSCO Information Services
- Kirstin Kemner-Heek - GBV
- Marko Knepper - University Library Mainz
- **Keven Liu - Shanghai Library**
刘炜 - 上海圖書館
- Boaz Nadav Manes - Lehigh University
- Maïke Osters - HBZ
- Leander Siege - Leipzig University
- Paula Sullenger - Texas A&M University
- Simeon Warner - Cornell University



Open Library FOUNDATION

开放图书馆基金会

董事会成员

Dr. Yunhai Tong
童云海



Tom Cramer
President

[View Bio](#)



Elizabeth German
Senior Program Officer

[View Bio](#)



Sam Brooks
Board Member

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David Carlson
Board Member

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Dr. Deborah Jakubs
Board Member

[View Bio](#)



Chris Keene
Board Member

[View Bio](#)



Paula Sullenger
Board Member

[View Bio](#)



Dr. Yunhai Tong
Board Member

[View Bio](#)

Latest Developments: the software

最新发展：软件

FOLIO 使用了现代化的微服务建构

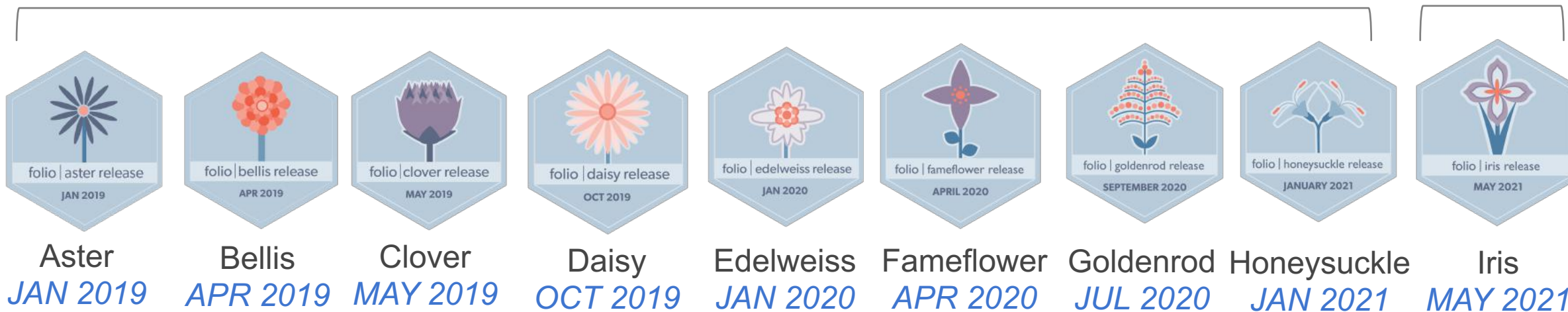
为什么重要

- 图书馆可以与在各自专业领域贡献和开发应用程序的不同供应商和团队合作
- **FOLIO** 不是单一版块，它由多个小的应用程序组成
 - 因此，图书馆可以轻松更新，从更快的程序发展中收益
- **FOLIO** 提供开发 **API**
 - 因此，它可以更容易地与现有系统整合——为图书馆的当前和未来提供更多的服务选择

FOLIO 软件发布里程碑

releases to date

upcoming
release

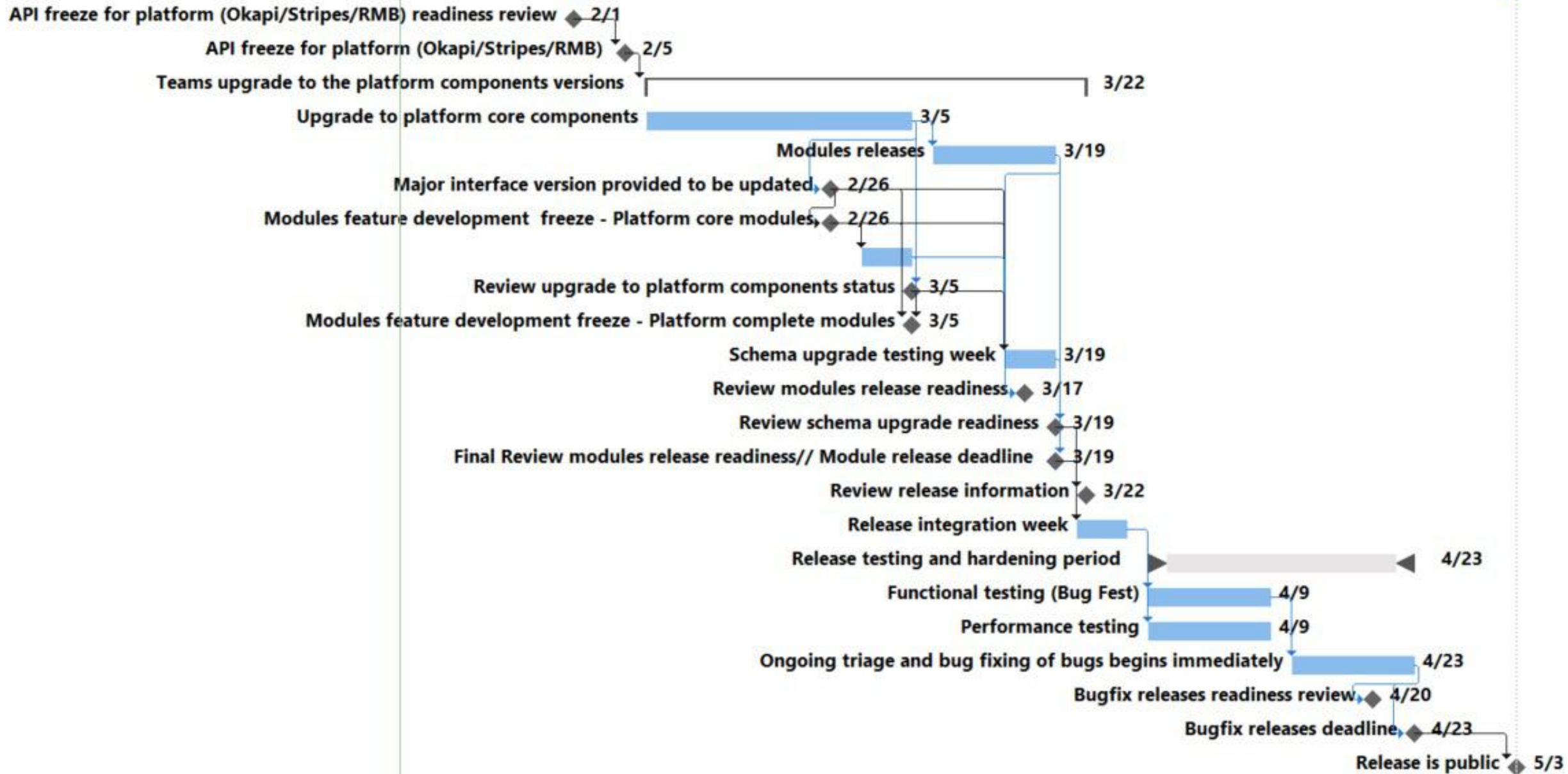


社群软件定期发布

~ 每季度增加 70 项功能
每季度发布 2 个版本
每年 4 个命名版本

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

2/1 R1 2021 Iris release May 3 2021



关于新功能的一些亮点

Data Import:

- 增强 MARC 记录处理
- EDIFACT 发票

Inventory:

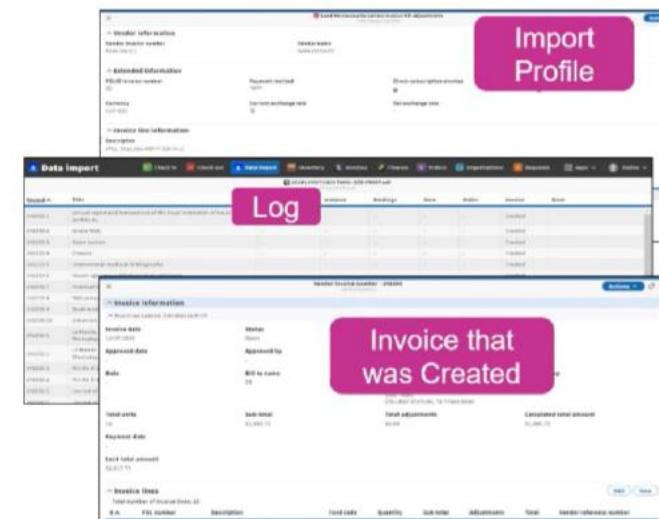
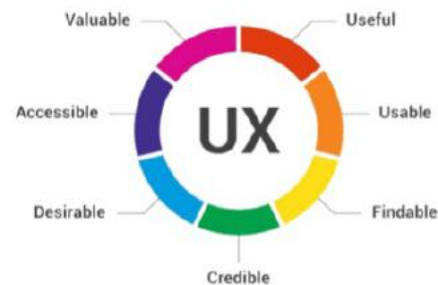
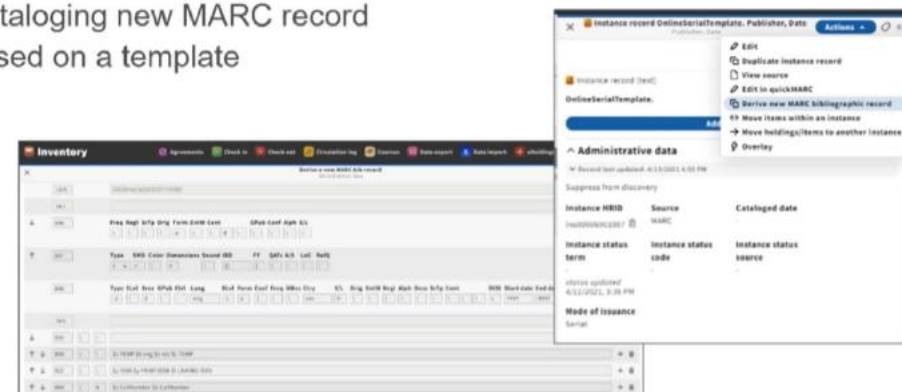
- 新来源 (source) 数据元素，支持 MARC 和 MFHD
- 标签用于 Instances、Holdings 和 Item 记录，并由它们进行筛选

Agreements:

- 新工作流程

Elasticsearch、UX Enhancements...

Cataloging new MARC record based on a template



EBSCO FOLIO Services & Beyond

EBSCO FOLIO 服务与更进一步

EBSCO FOLIO Services

我们提供什么服务



Implementation

部署与实施



Hosting

托管



Support

支持

EBSCO FOLIO Services — Partners

- Bywater, Portland, OR, USA
- Gest Info Services, Mexico City, Mexico
- Ignite, Mexico City, Mexico
- Kamanage Consulting, Lima, Peru
- Infoestrategica, Mexico City, Colombia
- Dossier Soluciones, Bogotá, Colombia
- Via Appia, Brasilia, Brazil
- Theke, Cordoba, Argentina
- IWA, Helsinki, Finland
- PTFS Europe, Woking, UK & Ireland



- Mygrator, Voorthuizen, Netherlands
- Sygnity Business Solutions, Zielona Gora, Poland
- AT CRIS, Karlsruhe, Germany
- BibLibre, Marseille, France
- IBAI-Scanbit, Vitoria, Spain
- Harmony Technology, Rabat, Morocco
- The Implementers, Beirut, Lebanon
- Knowledge E, Dubai, UAE
- KnowledgeWare Technologies, Riyadh, Saudi Arabia
- UKS, Johannesburg, South Africa



Panorama™

Insights Through Analytics

EBSCO



Panorama and FOLIO

Panorama 是下一代数据分析平台，结合了来自不同图书馆和校园系统的数据集合，帮助图书馆获取前所未有的分析见解。

- 采用现代分析技术搭建
- 搭配最高级可视化工具
- 为图书馆员提供一个集中平台选择馆内数据进行分析，并在一个安全的环境中显示有关图书馆及其服务的用户的信息

Panorama 将数据简化为集中式报告

图书馆
馆藏数据

图书馆管理系
统数据 (包括
FOLIO)

图书馆服务
数据

用户行为
和结果数据

图书馆的
具体数据

- COUNTER
- GOBI
- EBSCONET
- EDS
- EBSCOhost

- 用户人口统计
- 书目
- 馆藏
- 流通
- 采购

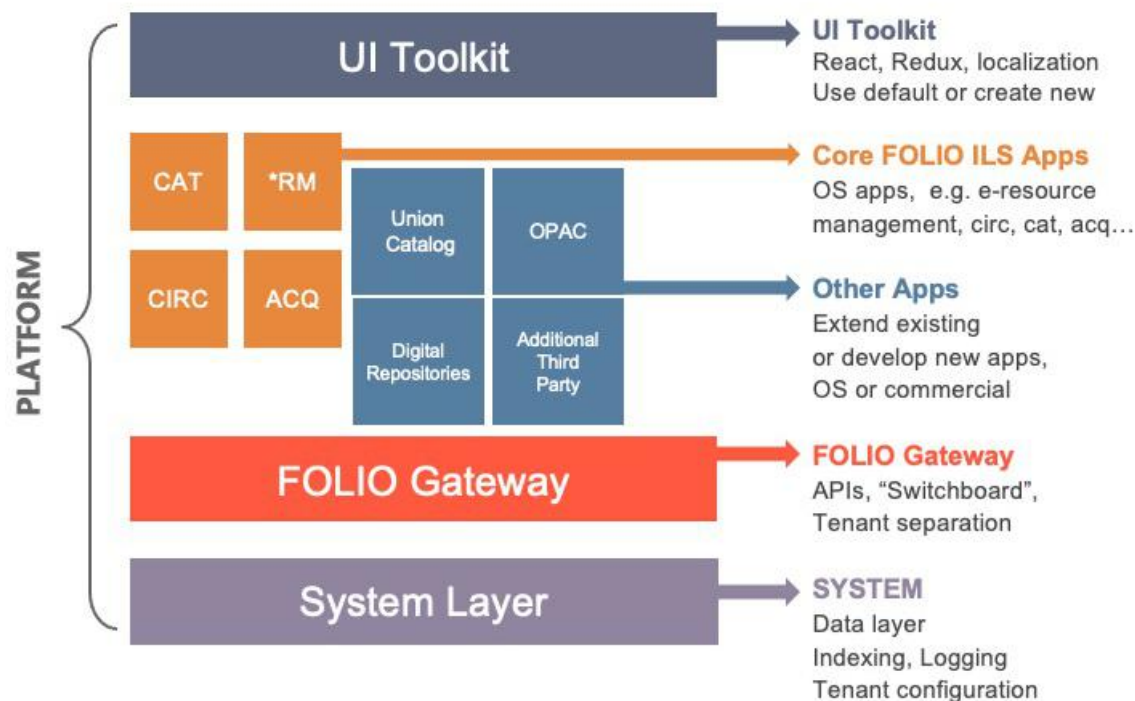
- 指南
- 参考
- 设施

- 认证
- SIS
- CRIS
- 资源管理数据

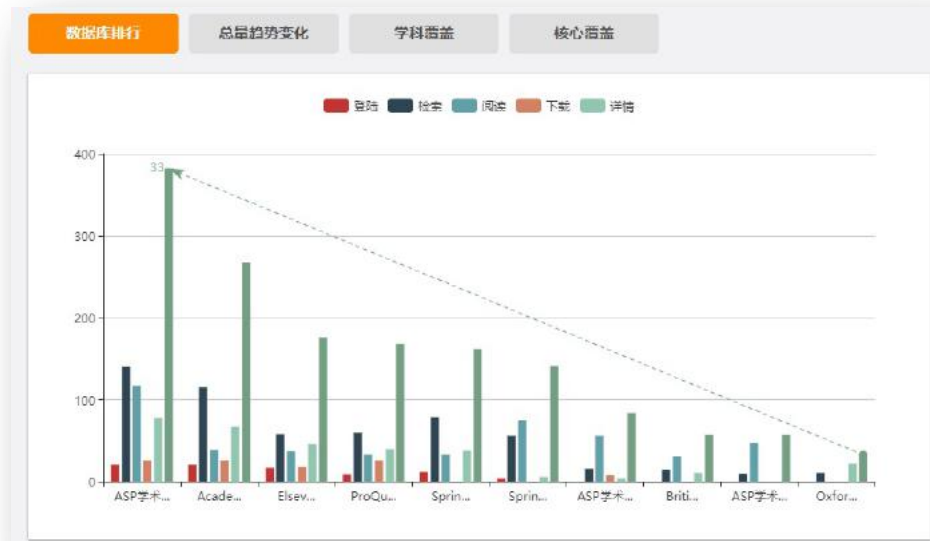
您可以选择要分
析的本馆数据

FOLIO ERM First 解决方案

- FOLIO 开放架构
- ERM 电子资源管理模块
 - EBSCO Knowledge Services 知识库
 - YIT FOLIO ERM 电子资源管理
- Discovery 发现层模块
 - EBSCO Discovery Service & API
 - YIT 学科服务平台/数据库导航
- 验证与访问数据框架模块
 - EBSCO
OpenAthens/Shibboleth/CARSI/YITLink
 - 资源智能网关访问



ERM电子资源管理



ERM powered by EBSCO Knowledge Services



The EBSCO KB:

used by over

7,200

libraries

includes

4 million

unique titles and

13,500

databases and packages

2.8 Billion

holdings managed

发现层 - EBSCO Discovery Service & API

UGA LIBRARIES
University Libraries
UNIVERSITY OF GEORGIA

Elizabeth Enduser
Undergraduate

Search Climate change

EBSCO Discovery Service

Services and Methods

Login

EDS API

- GET CreateSession ?
- POST CreateSession ?
- GET Info ?
- POST Info ?
- GET Search ?
- POST Search ?
- GET Retrieve ?
- POST Retrieve ?
- GET EndSession ?
- POST EndSession ?
- GET ExportFormat ?
- GET CitationStyles ?

Authentication

- POST UIDAuth ?

Publication API

- GET Search ?
- POST Search ?
- GET Retrieve ?
- POST Retrieve ?

Open in new window

```
<SearchResponseMessageGet xmlns="http://epnet.com/webservices/EbscoApi/Contracts" xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
  <SearchRequestGet>
    <QueryString>query-1=AND,nature&sort=relevance&includefacets=y&searchmode=all&autosuggest=n&
    amp;autocorrect=n&view=brief&resultsperpage=20&pagenumber=1&highlight=y&includeimagequickvie
    w=n</QueryString>
    <SearchCriteriaWithActions>
      <QueriesWithAction>
        <QueryWithAction>
          <Query>
            <BooleanOperator>AND</BooleanOperator>
            <Term>nature</Term>
          </Query>
          <RemoveAction>removequery(1)</RemoveAction>
        </QueryWithAction>
      </QueriesWithAction>
    </SearchCriteriaWithActions>
  </SearchRequestGet>
  <SearchResult>
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    </Statistics>
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        <Label>Academic Search Complete</Label>
        <Status>0</Status>
        <Hits>935919</Hits>
      </Database>
      <Database>
        <Id>edsovi</Id>
        <Label>Journals@OVID</Label>
        <Status>0</Status>
        <Hits>147797</Hits>
      </Database>
      <Database>
        <Id>edsswf</Id>
        <Label>Academic Conferences in China (Wanfang)</Label>
        <Status>0</Status>
        <Hits>511</Hits>
      </Database>
    </Databases>
  </SearchResult>
</SearchResponseMessageGet>
```

学科服务平台/数据库导航/资源智能网关访问

The image displays a collage of four overlapping screenshots from the Shanghai Library website and its associated services:

- Top Left:** The Shanghai Library website header, featuring the logo and navigation menu (Home, Resource Navigation, Special Topics, Service Guide, Search, Login, Chinese).
- Top Right:** A search interface for 'big data' with filters for sorting, document type, and source type. It also shows search conditions and expansion options.
- Middle Left:** An 'Authorization Login' (授权登录) form with fields for username (p000454184), password, and a 'Remember me' checkbox. It includes a 'Login' button and a 'QQ Login' option.
- Middle Right:** The Engineering Village search results page for the query 'lca'. It shows 3 records found in Compendex for 1884-2020. The first record is 'Laird commercial LCA-A' from Western Flying (1929). A tooltip indicates 'Access provided by Shanghai Library'.

与其他 EBSCO 服务和第三方解决方案集成



EBSCO
Discovery Service

Full Text Finder
Link Resolver

EBSCONET
Subscription
Management

Arkivum Digital
Preservation

GOBI Book Ordering
& Collection
Development

Stacks Library
Websites

ILL / Resource
Sharing

OpenAthens
Authentication

Panorama

EBSCO Usage
Consolidation

EBSCO Usage
Loading Service

Campus
Solutions

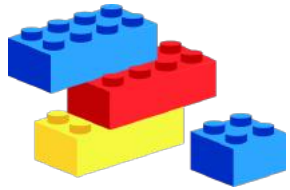


EBSCO FOLIO can support your library today and future
EBSCO FOLIO 现在就可以支持您图书馆今天和未来的各项智能与智慧服务

EBSCO



谢谢



Thank You