Unleashing latent data, linked data and library partnerships: EBSCO technology day, Manchester (UK)

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I was delighted to be able to attend my first in-person library event for nearly five years at EBSCO's Technology Day in Manchester. EBSCO organised this event, which included an overview of their latest products and wider developments around open-source software.

Latent data

The first session focused on EBSCO's relatively new Panorama tool. This is a data analytics product designed to solve the many challenges related to gathering and interpreting user analytics (e.g. footfall data, online resources usage and borrowing patterns).

The presenter observed that librarians are excellent at collecting data, but less effective at transforming it into something meaningful. The data which libraries collect tends to require intensive harvesting and manipulation, which is a challenge when library professionals have limited time. In a straw poll, which EBSCO conducted with some libraries, staff highlighted that they experienced various problems in harnessing user analytics. These included a lack of staff expertise, a lack of time and disparate data sources.

In this context, the goal of Panorama is to "unleash latent data". The product is around 18 months old, and so far, 24 libraries are using it. The tool is primarily designed for academic libraries, and EBSCO have worked with Lancaster University to develop and refine the tool.

The solution is built on the Tableau business intelligence tool and includes 26 standard dashboards. Libraries can create bespoke dashboards by editing the underlying system. Panorama is built on a data lake and data warehouse. EBSCO are developing a "data glossary" to create metadata which will help structure and organise the underlying data.

The tool can display data from library management systems including Alma and worldShare management services (WMS), and can integrate with Open Athens single sign-on. The presenter's advice was that libraries using Open Athens should make the most of any attribute data they can collect (e.g. the user's team and location). This then enables tools like Panorama to extract and analyse usage data across various attributes. Integrations between Panorama and the various data sources can be completed in a couple of weeks. It sounds like the main challenge is securing access to all the relevant data.

Linked data

BiblioGraph is a new EBSCO tool which they acquired just before the pandemic. This is a tool originally developed by online computer library center (OCLC) and includes capabilities to "link data" between different sources. The tool enables librarians to translate MARC records to "BIBFRAME" bibliographic standards, to link library catalogue data to the web or – crucially – Google. BIBFRAME is a relatively new metadata standard which may eventually replace MARC standards. Incidentally, I subsequently located the provocatively titled "MARC must die" article (Tennant, 2002), which is worth a read to understand some issues with MARC.

Linked data can enable libraries to enrich their collection visualisation and use data from sources like WikiData when displaying online carousels books. This has been used by the European Parliament Library (who use an Ex Libris catalogue) on their LibGuide page on artificial intelligence.

Linked data enables libraries to switch on Google Syndication, which means library catalogue information can appear on Google search results. Google can do this if the library collection can be accessed by more than 50% of a local population. The tool also enables the automatic translation of MARC records into other languages, as well as enabling better understanding of collection gaps. It integrates with EBSCO's existing product GOBI.

FOLIO

While I was interested to hear about the latest EBSCO products, I found the sessions on the open-source FOLIO (Future of Libraries Is Open) project equally interesting. It highlights how libraries and suppliers are now working in a partnership, rather than simply on a transactional basis.

FOLIO is a project in the library community to develop an open-source library management system. This is in response to a limited marketplace and library systems not always meeting library needs. FOLIO is overseen by the Open Library Foundation, which is a charity. Partners include JISC in the UK.

FOLIO includes special interest groups and encourages librarians to participate by making suggestions on future developments. There are now 60 libraries globally using the full FOLIO system, including Cornell University, Trinity College (Cambridge), Open Window Institute and Global Banking School and Library of Congress.

Lisa Sjogren is an implementation specialist at EBSCO and led on the implementation of the first FOLIO

implementation at Chalmers University of Technology (Sweden). For their library management system (LMS), they were previously using a combination Sierra, Intota and Summon. Issues included: paying for features they never used; lack of development in these systems; and lack of integration with other tools and old-fashioned interfaces. Overall, it took two years to implement FOLIO at Chalmers University and was finished in September 2019. The typical implementation is now much quicker, and takes six to nine months.

The presenter highlighted how it was important to use the new system to rethink current workflows and processes and use the opportunity to make changes. Moving LMS was also an opportunity to tidy up data or to enrich previously missing data. A key part of the implementation was to test the system with library specialists. They engaged a team of subject librarians and system librarians to test the system and gradually refine it. A major benefit of moving to an open-source system is that it gives libraries "digital autonomy", by not being tied to one vendor.

FOLIO electronic resource management

FOLIO has a sub-product called an electronic resource management (ERM) system. This captures records of licences, agreements and expiry dates in a single place – it also has a finance module. EBSCO can act as a consultant to help implement this.

York St John University and Lincoln University (both in the UK) shared their experiences. They previously used spreadsheets and SharePoint sites to manage the information on online resources, which they found time consuming and unwieldy. There was a collective recognition around the room that library colleagues tended to use Excel and SharePoint for this information.

When transferring to FOLIO ERM, they conducted details data mapping work and were able to customise the system to suit their needs. For example, York St John added in a new field showing "Faculties" or "Schools". I am not familiar with ERM systems so was interested to hear about how they are used in practice, particularly how they could save time for library professionals.

Partnerships

EBSCO presented how they are working with various partners in the sector to support with open-source software. These include PTFS Europe, who support both Koha and FOLIO and have recently developed an inter-library loan module integrating with the British Library. They briefly touched on direct consortia borrowing which is where libraries share resources and purchasing power. The benefits of this are that it is high volume, low cost and impacts on a high number of library users.

Summary

Overall, I found this to be a valuable and informative day. I was interested to hear about some of the technical detail around EBSCO's new products. I must confess I did not know about BIBFRAME before the day, so felt I learnt something new in this area. I was also interested in how open-source software in libraries is continuing to develop and evolve. The day highlighted how the library–supplier relationship is shifting towards a situation where a supplier acts more as a partner or consultant providing value-added services.

REFERENCE

Tennant, R. (2002), "MARC must die", *Library Journal*, Vol. 127 No. 17, pp. 26-27.

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