



FOLIO Update



Delivering features

FOLIO

Locate experience

- In progress,
due mid year

- Improved record suppression at instance, holding and item level
- Multi-item selection in RTAC allowing patrons to place a hold on multiple items for a title with multiple requestable components
- RTAC performance improvements of large holding sets
- Bulk record selection – ability to download, cite, add to project, and share multiple results from the result list and Dashboard
- Integrate additional holdings information and associated holdings notes for versions / copies to improve search and discovery for patrons
- Accessibility updates to ensure Locate is Title II compliant ahead of April 2026 deadline
- Simple chat service integration via URL
- Locate DCB – improved search and authentication flow between OpenRS and Locate DCB for SSO and PII sharing
- ILL integration support for Illiad, Aeon and Tipasa. Direct to service for any customer needing it. No OpenRS needed.
- Standardize call number browse to reference all classification systems

FOLIO

- Due mid-year

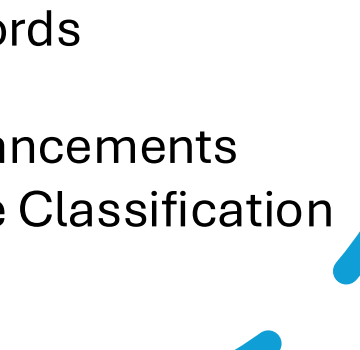
- **Acquisitions**

- Mosaic EDI integration for processing Invoices
- Mosaic API integration for creating Purchase Orders
- Allow library to set alternate external exchange rate source

- **Bulk-edit**

- Set instance/MARC bib record to delete
- Creating and Managing Bulk Edit Profiles for Scheduling Jobs (UI in following release)
- Bulk edit performance improvements

- **Cataloging**

- MARC authority : Export MARC records enhancements
 - Inventory app - Search results enhancements
 - Add Title & contributors to Instance Classification browse results
 - ECS - MARC holdings support
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FOLIO

- Due mid-year

- **Circulation**
 - Claimed returned functionality for ECS
 - Declared lost functionality for ECS
 - Marked missing functionality for ECS
 - Reading room circulation
- **Data import & export**
 - Stop processing job after cancelled by user
- **Linked Data**
 - Mapping of Work entity components | Instance entity components
 - Data Import & export - Thin Thread
 - Authority lookup
 - Profiles for Linked Data Editor (Monograph, Rare Books, Serials)

FOLIO

- Due mid-year

- **Lists**
 - Lists/FQM performance improvements
 - Create lists from user-defined entity types
 - User-defined entities with joins, created via API
 - Expanded data coverage:
 - Acquisitions
 - Fees/fines
 - Users/Orders custom fields
 - MARC bibs
 - MARC authorities
 - Access to SRS & inventory records using FQM APIs
 - Query free text repeatable fields





Roadmap

Customer Focused - FOLIO, Locate & EDS

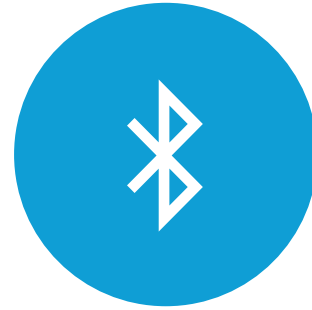
FOLIO 18 Month Roadmap



DISCOVERY EXPERIENCE



UNIFIED ADMINISTRATION &
CONFIGURATION



SHARED NETWORK
FUNCTIONALITY (CONSORTIA)
IMPROVEMENTS




REPORTING



Unified Discovery experience

- Combine Discovery, OPAC, ECS, OpenRS & ILL requesting into a single experience
- Reporting for customers to track usage of Locate & EDS.
- Configurable via FOLIO UI
 - Locate features and branding
 - FTF / Link resolver features and branding
 - Pub-Finder features and branding
 - EDS features and branding

FOLIO Reporting

- **Lists (Operational Reports)**
 - Standard set of entity types based on joins for EBSCO customers
 - Standard set of lists needed by most libraries
 - Toolkit for FOLIO development teams to add lists
 - Expanded data coverage, eliminate “in app” reports
 - Ability to save search results as lists
 - **Panorama (EBSCO FOLIO Analytics)**
 - Panorama dashboard access via FOLIO Analytics app
 - Ability to load a FOLIO list
 - Major improvement of FOLIO & Locate data coverage
 - Consortia dashboards
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Which Tool to Use?



Operational, current-state question → Lists



Trends, annual stats, comparisons → Panorama



Expert users & data engineer data access via SQL → MetaDB

FOLIO Reporting Narrative



Lists answers what is
happening now

Panorama explains what
has happened and why

MetaDB gives advanced
customers control

FOLIO

- **ERM/HLM**
 - Consortia Enhancements
 - Eliminate the need for FOLIO libraries to use HLM
 - **Workflow**
 - Improvements across Cataloging, Acquisitions, ERM & Tasks for single libraries & consortia
 - **Consortia**
 - ECS enhancements for circulation (requests)
 - ILL integration enhancements
 - Cataloging and Authority control
 - ERM & purchasing
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