Esploro – From Vision To Reality

Nadav Doron, VP Research Information Management Solutions
Adi Alter, Director of Product Management, Research Solutions
Vision
The Research Solutions Landscape: Current Challenges

- Disjoint point solutions with lots of duplicative and manual work
- STEM focused
- Reliance on researcher’s deposits & manual work
- Lack of integration with library workflows
- Incomplete researcher’s profiles & analytics
- Limited built-in collaborations and open APIs
Paving the way to greater impact of academic research by maximizing visibility, efficiency, and compliance of research activities, leveraging library expertise and technology
Increased impact of research activities

- Data exposure via discovery & institutional portals
- Automated update of researcher profile
- Research metrics and benchmarks

A next-gen research repository

- All research assets in one place, connected
- Intelligent capture
- Enrichment of metadata
Creating the Next-Generation Research Repository

A wide range of research assets

- **Publications**: Articles, pre-prints, thesis, dissertations, etc.
- **Creative Works**: Performing art, media installations, drawings, compositions, etc.
- **Research Data**: Datasets, raw data, computations, Software, ELNs, etc.
- **Activities**: Achievements, Awards, Social & Media mention, etc.

Systematic and sustainable data management

- Automated curation
- Metadata enrichment
- Discoverability & accessibility
- Linking research assets and metadata
- Data safeguarding

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Getting the Data – a Changed Paradigm

More streamlined author archive/deposit interwoven into work process

- Simple, embedded and integrated
- Automated metadata (when possible) and notifications

Intelligent Migration & Capture Process

- Automated author matching and deduplication processes based on advanced algorithms
- Customizable crosswalk for metadata
- Process tailored to the institutional needs and systems
- Flexible integration options – OAI-PMH, CSV, APIs
Guiding Principles for Esploro

**We will not change researchers’ habits**
- Will be seamless to the researchers’ flow
- The service will still work even if researchers don’t fully engage with the system

**We will not create more work for librarians**
- Eliminate redundant and manual processes
- Rule-based workflows

**We will not be yet another point solution**
- Open, interoperable and integrated with other systems
- Intuitive out-of-the-box, yet highly configurable per institution
The Reality
The Framework: Research Services Platform

Information Exposure
- Researcher
- Librarian/Admin
- Discovery

Researcher Profiles

Analytics & Reports

Research Assets Management
- Publications
- Creative Works
- Research Data
- Activities

Metadata curation and enrichment

Intelligent capture of research assets

APIs & tools for community collaboration

- Mediated Deposit
- Automatic Capture
- Migration

Intelligent capture of research assets
Intelligent Capture

Information Exposure
- Researcher
- Librarian/Admin
- Discovery

APIs & tools for community collaboration

Researcher & Mediated Deposit
- Descriptive metadata forms tailored per asset type
- Metadata auto-population
- Author matching
- Access rights and licenses on asset and file levels
- Deposit policies
- Asset relationships

Automatic (External) Capture
- Demonstration of capabilities
- Publications and datasets
- Author matching
- Assets deduplication
- Summon Index content

Migration
- OAI-PMH harvester
- Digital Commons import
- CSV bulk loader
- Author matching
- Assets deduplication
- Delivery usage migration

Intelligent capture of research assets
Research Assets Management

Deposit Management
- Deposit task list
- Deposit management screen
- Deposit search
- Deposit curation and approval workflows
- Author matching and deduplication on deposit
- Communication flows with the researcher

Research Assets Management
- Metadata editing forms
- Basic and advanced search
- Bulk metadata management tools
- DOI minting – DataCite and Crossref
- Grants metadata management

Metadata curation and enrichment

Supported Asset Types
- Journal articles
- Book chapters
- Conference proceedings
- Data sets
- Books
- Presentations
- Posters
- ETDs
- Posted content
- Conferences
- Creative works
- Generic

Publications | Creative Works | Research Data | Activities
Research Portal, Discoverability and Researcher Profiles

Information Exposure
- Researcher
- Librarian/Admin

Discovery

Researcher Profiles

Analytics & Reports

Research Assets Management
- Publications
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Metadata curation and enrichment

Intelligent capture of research assets

APIs & tools for community collaboration

Mediated
- Deposit

Automatic
- Capture

Researcher Deposit

Migration

Discoverability on Primo / Primo VE
- Discoverability on Google & Google Scholar
- Dedicated research discovery portal
- Public profile – controlled release
- OAI-PMH publisher
- Viewer for documents, images, and audiovisual content
Analytics

Information Exposure
- Researcher
- Librarian/Admin
- Discovery

Researcher Profiles

Research Assets Management
- Publications
- Creative Works

Metadata curation and enrichment

APIs & tools for community collaboration
- Repository analytics
- Usage analytics
- Researchers analytics
- Deposit analytics
- Analytics displayed on the Librarian Portal and via APIs

Intelligent capture of research assets
Researcher Center

Information Exposure

- Researcher
- Librarian/Admin
- Discovery

APIs & tools for community collaboration

- Intelligent capture of research assets
- Mediated Deposit
- Automatic Capture
- Migration

Metadata curation and enrichment
- Publications
- Creative Works
- Research Data
- Activities

- Deposit wizard with auto-population
- Deposit drafts
- Assets management
- Edit deposits
- Communication with the library
- Researcher settings management

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Librarian/Admin View

Information Exposure

- Researcher
- Librarian/Admin
- Discovery

- Research Assets Management
- Intelligent Capture Management
- Organization Management
  - Organizations upload – onetime
  - Manual organizations management
- External Organization Management
  - Periodically updated by Ex Libris
  - Extendable by the institution
- Researcher Management
  - Automated upload – onetime and ongoing
  - Researchers management screens (affiliated and nonaffiliated)
  - Researchers search
APIs & Tools for Community Collaboration

- Research Assets Management APIs
- Analytics APIs
- OAI-PMH publishing
- OAI-PMH harvesting

Information Exposure
- Researcher
- Librarian/Admin
- Discovery

Researcher Profiles

Analytics & Reports
- Research Works
- Research Data
- Activities

Metadata curation and enrichment

Research Deposit

Mediated Deposit

Automatic Capture

Migration

Intelligent capture of research assets
Now Available in the Knowledge Center
When is Esploro Available?
A Growing Community Worldwide
Esploro Timeline

- **Development started**
- **Development Partners implementation & migrations**
- **Early Adopters implementation & migrations**

- **Q3** to **Q4** 2017: Dev Partners kickoff
- **Q1** to **Q4** 2018: Monthly Releases
- **Q1** to **Q4** 2019: U. Iowa Go Live

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The Esploro Difference

1. Integrated & Unified
   Integrated workflows & discovery for research assets

2. More Content
   Content is linked and connected, including non-STEM, creative work & data

3. Professional Curation
   Including advanced and automatic Metadata enhancements

4. New & Innovative Model
   Intelligent capture, automatic metadata population

5. Open & Extensible
   open APIs and easily customizable solutions

6. Integrated Analytics
   Cross functions analytics & Metrics
Want to Learn More?

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THANK YOU!

Nadav.Doron@exlibrisgroup.com
Adi.Alter@exlibrisgroup.com