

follio



future of libraries is open



National Széchényi Library
June 25, 2018
Budapest

FOLIO Partnerships

Tamir Borensztajn
Pavel Synek
EBSCO Information Services



FOLIO 101





Cordoba, Argentina.
 Photo by Jenny Carden -
<http://beforeidie.cc/site/about/>

Stuff you
WANT.



A **COMMUNITY** focused on
innovation via collaboration:

Libraries, vendors and
service providers.



The Initial Partners



CHALMERS
UNIVERSITY OF TECHNOLOGY

THE UNIVERSITY OF
ALABAMA

UMASS
AMHERST



GBV | VZG



**China Academic Library and
Information System (CALIS)**



Universidad Nacional
Autónoma de México



LEHIGH
UNIVERSITY



Duke
UNIVERSITY



Cornell University



SOAS
University of London



University
of Glasgow



UNIVERSITY
OF ABERDEEN



Fenway
Libraries
Online
flo.org

NC STATE
UNIVERSITY



UNIVERSITÄT LEIPZIG



AUBURN
UNIVERSITY



CHARLES
UNIVERSITY
IN PRAGUE

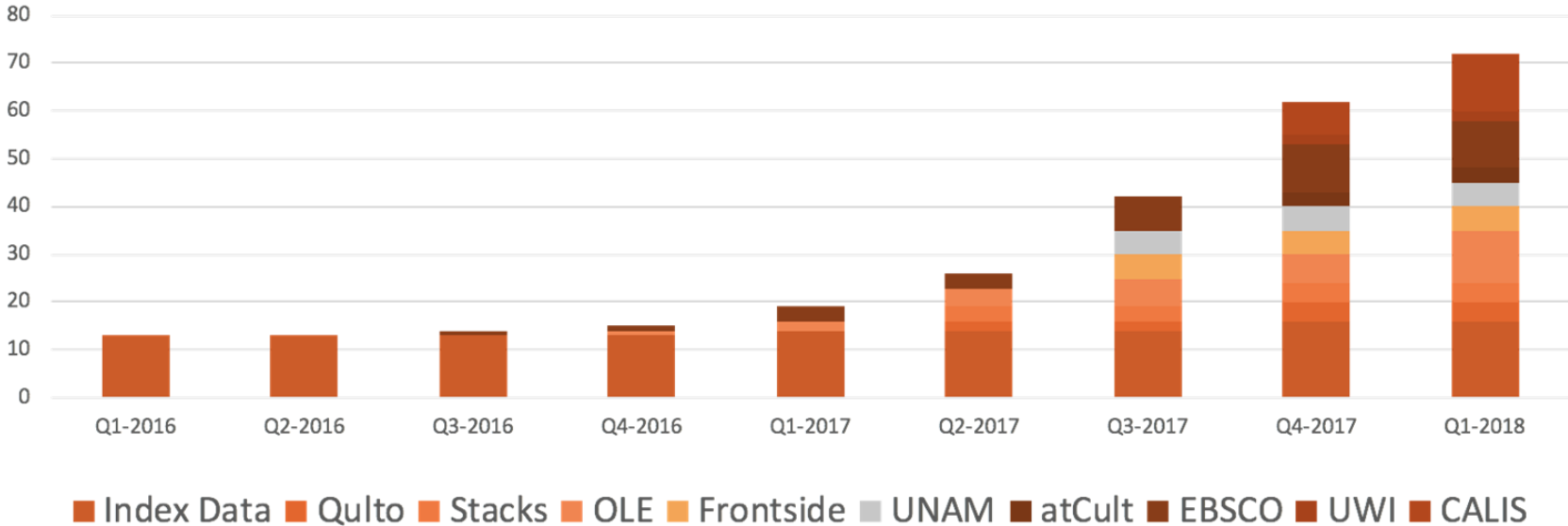


SAPIENZA
UNIVERSITÀ DI ROMA



FOLIO Development Team Ramp Up

Development Teams



Excludes Product Owners and UI designers

Libraries

Library	Focus
OLE	General Platform Features, UI Styling and Guidelines, Authentication, Permission Sets, Codex Search Implementation , Inventory Management, Record Import. Users, Circulation (Check Out/In, loan policies, Holds/recalls, proxy borrowers), etc.
OLE/hbz (Germany)	Resource management (cost, licenses), MARC Record Import,
OLE/gbv (Germany)	Loan rules etc., Licenses
OLE/Cornell	Fees/Fines, Payments, Overdues, Check-in/Checkout/Requests, Loan Policies, Items etc.
OLE/Texas A&M	User Search and select Popup
OLE/Auburn	Archives & Special Collections
UNAM (Mexico)	Fees/fines

Development Providers



Vendor	Focus
Index Data	FOLIO architecture, Platform (Okapi and Stripes), Codex, Search, Inventory management, test automation, UI styling and guidelines, Authentication, Permission Sets, Record Import. Stress/functional Testing, CI/CD...
Qulto (Hungary)	Single sign-on, User Import, Library Calendar, Reporting
Frontside (US)	Holdings data service
Stacks (Canada)	Acquisitions
EBSCO	FOLIO architecture and Roadmap, Project/Product Management. KB integration, Hosting, Localization, User management; Circulation (loan policies, proxy, requests)
@Cult (Italy)	Cataloging, Metadata Management,
Knowledge Integration (UK)	KB integration



**~250
Attendees**

**6 Tracks –
Multiple
Business
Meetings
Across
Communities**

**YouTube
Livestream**

**Governance
Meetings**



FOLIO Governance





The Agreement...



Future Ready

Multi-tenant, cloud-ready, knowledgebase(s), hostable by commercial entities, library networks, or institutions



Community

Design for community engagement
Modular – apps contributed by libraries or vendors

Resources

Electronic and print resource management in a single framework



Open

Open APIs, code, development process, relationships, Apache 2





The
Open
Library
Foundation

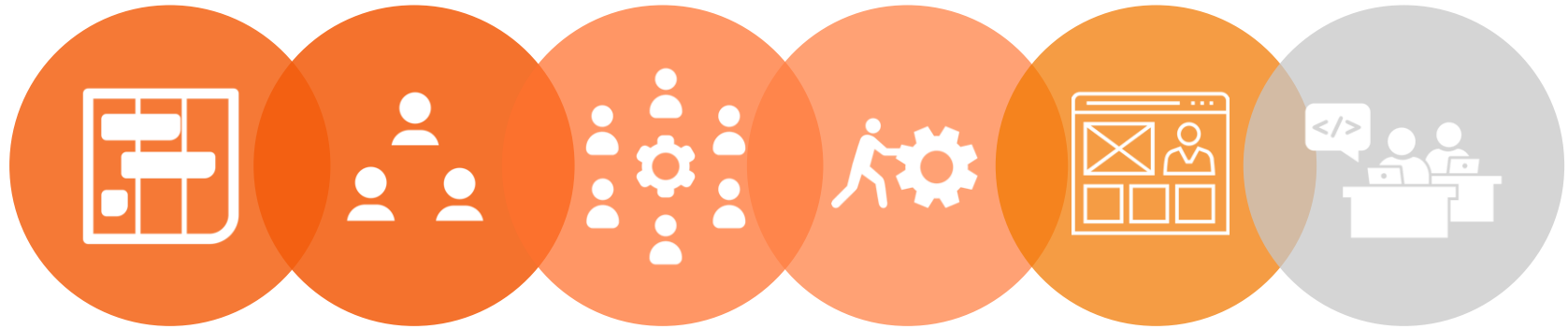
- 501(c)(3) tax-exempt status
- Administrative home for FOLIO
- Bylaws adopted and published
- Initial projects in place



Governance / Lazy
Consensus

Workflow within the FOLIO Community

external projects also exists outside of this construct



01 Product Manager
Person who proposes roadmap

02 Product Council
Management that looks at ways to move the process forward. Resource via SIGs

03 SIGs
Subject mater experts in functional areas who help with requirements and design

04 Product Owners
Decompose charge into requirements

05 Designer
UX/UI first approach to define FOLIO design

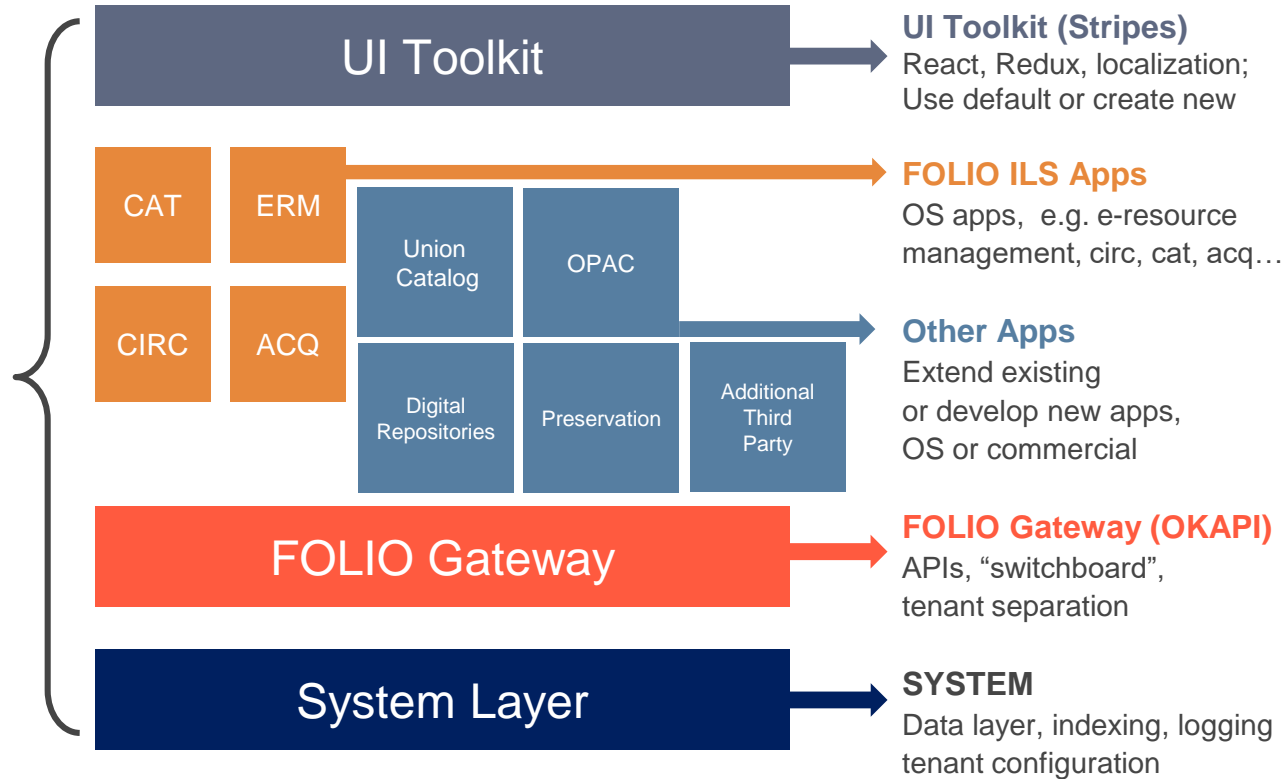
06 Development
Uses requirements defined by PO, Designer and SIGs. Fast feedback loop



FOLIO Platform



FOLIO Architecture



FOLIO core apps

**Resource Access
(Circulation)**

**Metadata Management
(Cataloging)**

User Management

**Resource Management
(E+P)**

Acquisitions

Operations Management





FOLIO core apps

**Resource Access
(Circulation)**

**Metadata Management
(Cataloging)**

User Management

**Resource Management
(E+P)**

Acquisitions

Operations Management

**Discovery and data
services**

**OPAC/Discovery
(EDS)/Union Catalog**

Knowledgebase

Data Services APIs



FOLIO core apps

**Resource Access
(Circulation)**

**Metadata Management
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User Management

**Resource Management
(E+P)**

Acquisitions

Operations Management

Discovery and data services

**OPAC/Discovery
(EDS)/Union Catalog**

Knowledgebase

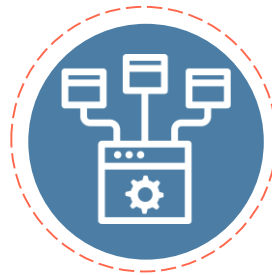
Data Services APIs

Extended apps

Digital Repositories

Long-term Preservation

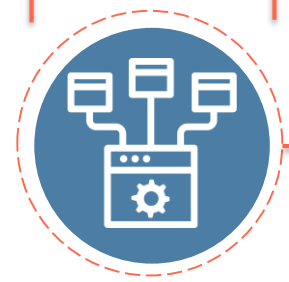
FOLIO platform



APIs
Microservices architecture
and the OKAPI framework
connect data and systems



FOLIO platform



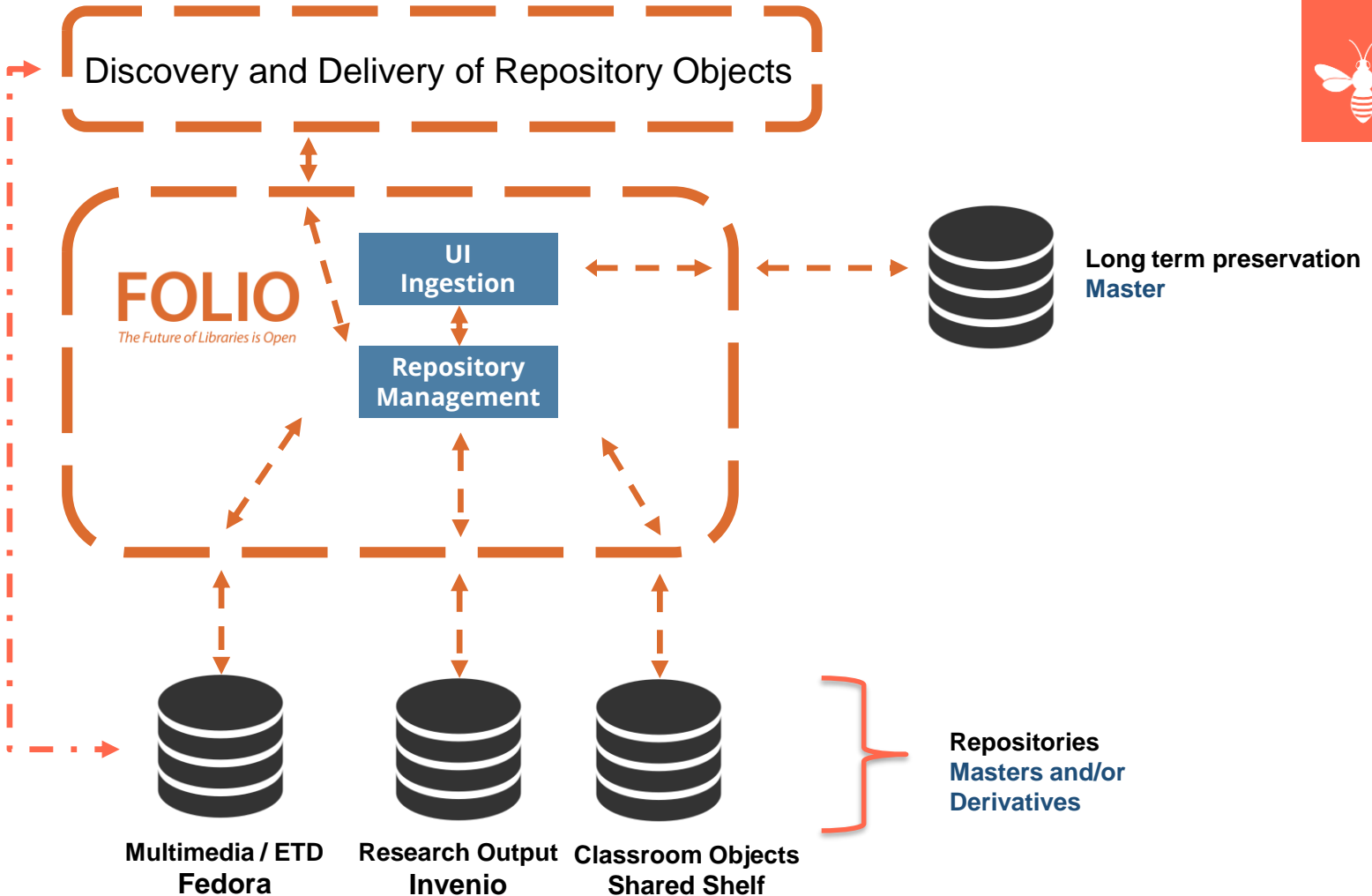
Resource management
Electronic and physical
EBSCO KB for ERM
Codex unified repository

Union catalog
Common shared catalog
Resource sharing

APIs
Microservices architecture
and the OKAPI framework
connect data and systems

Digital repositories
Support digital collections,
repositories and the
library's digitization needs

Long-term preservation
Long-term data
management and
digital preservation
requirements



Discovery and Delivery of Repository Objects

FOLIO
The Future of Libraries is Open

UI
Ingestion

Repository
Management

Long term preservation
Master

Multimedia / ETD
Fedora

Research Output
Invenio

Classroom Objects
Shared Shelf

Repositories
Masters and/or
Derivatives



Content

From EBSCO or other source



Subscriptions
Digital repository
Legal deposits



FOLIO
Ingest
Describe
Manage





Content

From EBSCO or other source



Subscriptions
Digital repository
Legal deposits

FOLIO
Ingest
Describe
Manage



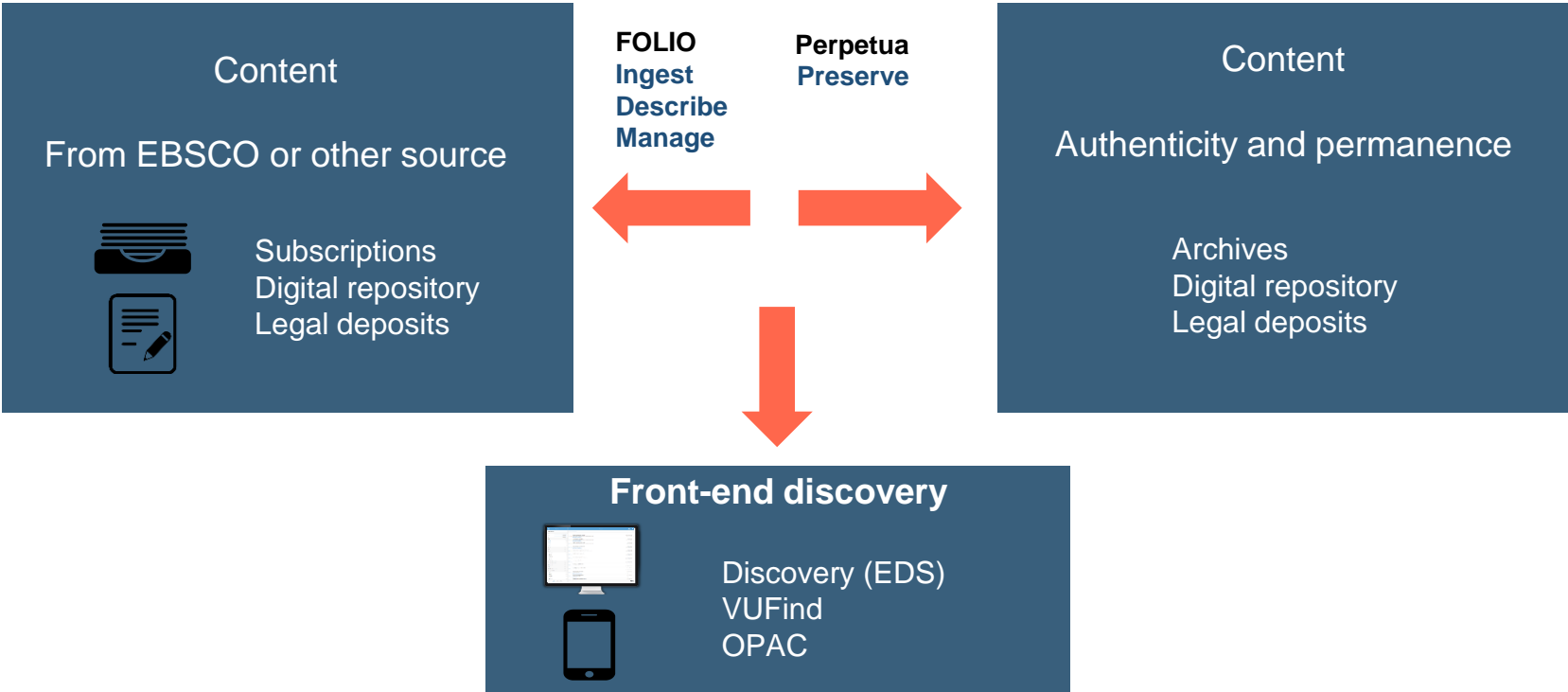
Perpetua
Preserve



Content

Authenticity and permanence

Archives
Digital repository
Legal deposits



Content

From EBSCO or other source



Subscriptions
Digital repository
Legal deposits

FOLIO
Ingest
Describe
Manage

Perpetua
Preserve

Content

Authenticity and permanence

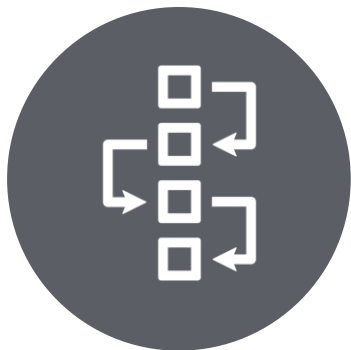
Archives
Digital repository
Legal deposits

Front-end discovery



Discovery (EDS)
VUFind
OPAC

Extending FOLIO



Workflow Engine

- Driven by FOLIO libraries
- Cross-cutting automation
- Response to market need
- More open than current offerings

Visit:
UX.FOLIO.ORG



Got
Developers?



Contribute
strategy or
expertise?



Not sure?



Write apps.
Join dev groups

dev.folio.org
folioproject.slack.com

Join a SIG
Participate in
strategy

wiki.folio.org
discuss.folio.org

Join the community;
follow progress,
chime in, host or
partake in a meetup

folio.org



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Get in touch, get involved!
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