



FOLIO

Community and Software

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Who we are ...





VZG: Headquarter of the GBV

- Common Library Network GBV
- One of six regional library service networks in Germany
- Headquarter „VZG“ situated in Göttingen, Lower Saxony



Quelle: Wikipedia



VZG|GBV: Common Library Network

- Host for regional union catalogue (collaborative cataloguing)
- Located in a heterogenous software environment for its libraries
- Provides ILS (SaaS), ILL, portals and other services
- FOLIO project cooperation with North Rhine-Westphalian Library Service Centre (hbz), Cologne





VZG|GBV: Common Library Network

- Using OCLC CBS since 1993 for the Union Catalogue
 - For 72 academic libraries, 400 research libraries
 - With more than 37 m bibliographic and 89 m holding records
 - 122,000 e-journals, 2,100,000 online resources (ebooks, articles)
 - Integrated ILL
- Using OCLC LBS since 1993 as ILS in 188 libraries in 30 sites
 - OPAC, acquisition, circulation, work catalogue, user management, systems administration

FOLIO





FOLIO overview

- Development since 2016
 - Founded as open source project by EBSCO, Index Data and the OLE community (Open Library Environment)
- Goal
 - Development of a Library Service Platform (LSP)
 - Open, sustainable, innovative, flexible, enhanceable
- Target Group
 - Academic and research libraries



FOLIO overview

- Conception and Development of a technical platform „Okapi“
- Development of „FOLIO“ as LMS on this platform
- Organization of end user applications = „apps“
- LMS development follows the design concept of
 - user experience design (UX)
 - user interface design (UI)
 - interaction design (IxD)



FOLIO overview

- Open for
 - Libraries
 - Commercial vendors
 - Service providers
- In 2018 apps for
 - Circulation, media type independent acquisition and management, meta data management
 - Budget control, vendor data and user data management, systems administration



FOLIO community

- New administrative home since 2016
 - [Open Library Foundation](#)
- Stakeholders
 - EBSCO, Index Data, OLE Community
- Development organizations
 - Stacks, K-Int, Qulto, @cult, FrontSide, UNAM
- Others



FOLIO funding and staff resources

- EBSCO
- Index Data
 - Hired by EBSCO
- OLE Community
 - [Andrew W. Mellon Foundation](#) and community funded
- Engagement of other development companies and libraries

OLE community



Partner Institutions





FOLIO organization

- Special Interest Groups (SIG's)
- Product Council
- Developers
- UX/UI designers
- Product owner
- Stakeholders Board



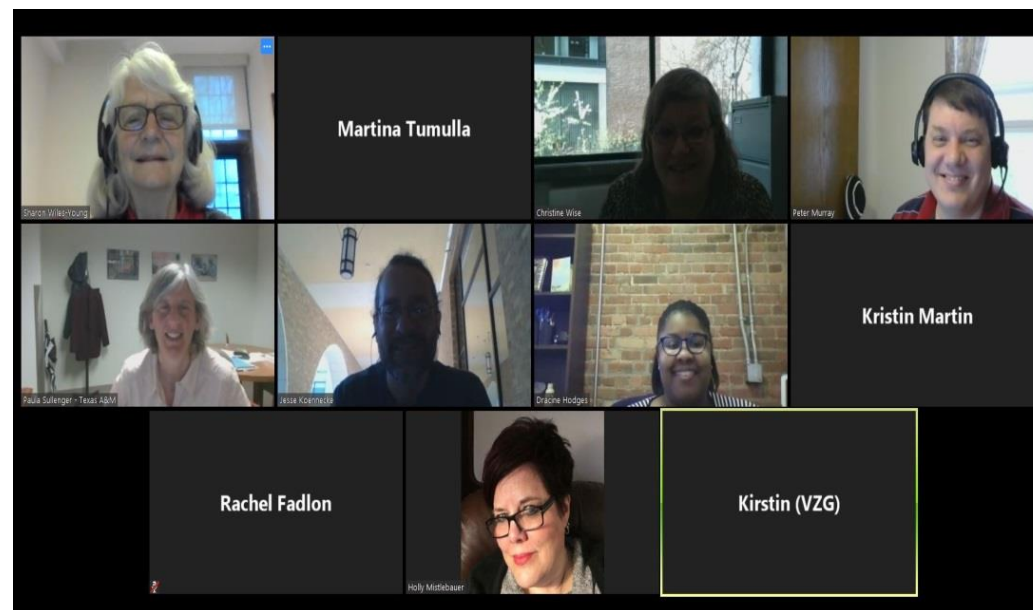
FOLIO special interest groups

SIG's	About
<ul style="list-style-type: none">• Metadata Management• Resource Access• Resource Management• User Management• Internationalization• Consortia• Reporting• Privacy• Accessibility• System Operations and Management	<ul style="list-style-type: none">• SIG's per topic/module/app• Subject matter experts• Facilitated by convener and/or product owner• Resourced by FOLIO Product Council• Weekly web conferences• Definition of requirements and use cases• Library expertise



FOLIO Product Council

- Supports and coordinates SIG work
- Information hub
- Responsible for roadmap, prioritization, and resourcing
- Comprises of OLE partner libraries, EBSCO and Index Data
- Weekly web conferences



FOLIO developers



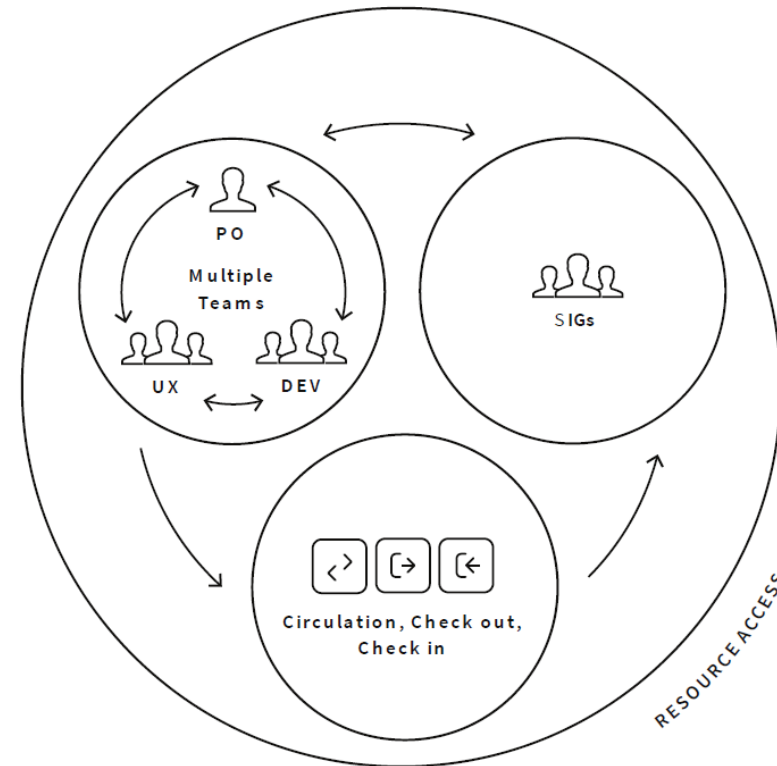
Developer teams	Task
<ul style="list-style-type: none">• Index Data• OLE developer• OLE developer / Mellon Foundation funded• EBSCO• Development companies: Stacks, UNAM, FrontSide, Qulto, @Cult, K-Int• Others	<ul style="list-style-type: none">• Development lead and organisation, core team• Core team and app development• App development for OLE community• App development• Contracted development• Independent development

„Getting started for developers“ - see „guidelines“: <http://dev.folio.org/community/>



FOLIO conceptual work

- UX/UI Designer
 - Base for app development
- Product Owner
 - Responsible for transfer of functional requirements into technical specifications
 - Connection to developer teams
 - Responsible for fulfilment of timeline and road map goals of his „product“ (= app)



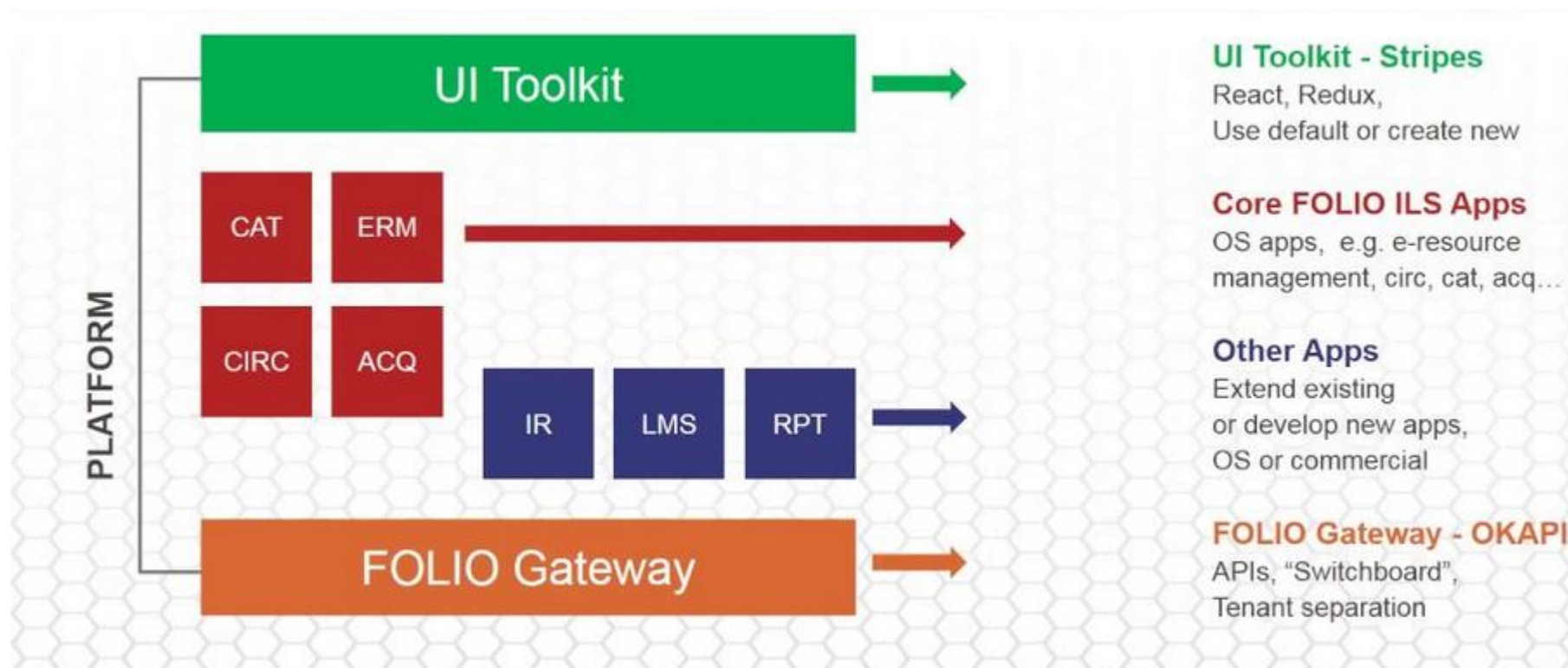
SIGs = Special Interest Groups
UX = User Experience Designer
DEV = Developer = Softwareentwickler
PO = Product Owner



FOLIO communication



FOLIO technical architecture



FOLIO software - users



The screenshot displays the FOLIO software interface on a laptop screen. The browser address bar shows the URL: <https://folio-demo.gbv.de/users/view/50fb08c1-08bf-422d-9c18-429a623ac9e7?filters=active.Active&query=&sort=Name>.

The interface is divided into two main sections:

- Left Panel (Search & Filter):** Contains a search bar and filter options. The "Status" filter is set to "Active". The "Patron group" filter is set to "faculty".
- Main Table:** A table listing users. The table has columns: Aktiv, Name, Barcode, Nutzergruppe, Benutzername, and E-Mail. The first row is highlighted, showing the user "Abbott, Scottie" with barcode "641332826549945" and email "everette@mcdermott-schulist.gst".
- Right Panel (User Details):** Displays detailed information for the selected user "Abbott, Scottie". It includes sections for "Benutzerinformationen", "Erweiterte Informationen", and "Kontaktinformationen".

Benutzerinformationen:

Nachname	Vorname	Weiterer Vorname	Barcode
Abbott	Scottie		641332826549945

Erweiterte Informationen:

Aufnahmedatum	Externe System-ID	Geburtsdatum	Folio-Nummer
2.4.2017		18.6.1971	50fb08c1-08bf-422d-9c18-429a623ac9e7

Kontaktinformationen:

E-Mail	Telefon	Mobiletelefon	Bevorzugte Kontaktmöglichkeit
everette@mcdermott-schulist.gst	(479)814-0762 x02883	804.492.8252	E-Mail

Addresses:

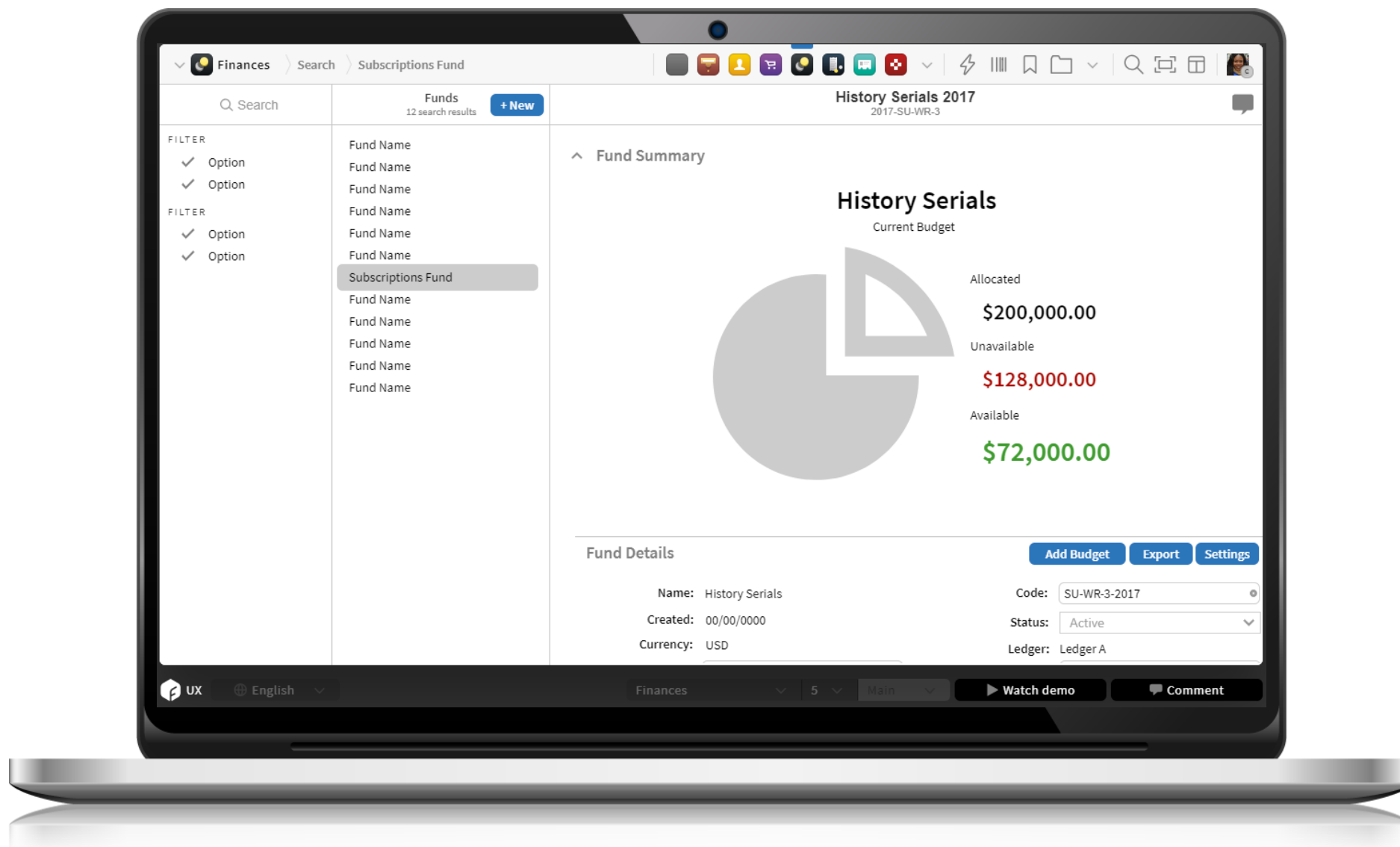
Vollmachtgeber: 1

Ausleihen:

- 4 Aktuelle Ausleihen
- 4 Ausleihhistorie

Benutzerberechtigungen: 0

FOLIO software - finances





FOLIO team in VZG and hbz

- Active cooperation in FOLIO project
 - Functional experts and developers
 - FOLIO Product Council, Stakeholders Board, SIGs, subgroups (incl. convener)
- Active cooperation in OLE community
 - Board, Steering Committee
- Joint representation of network interests
 - Workshops, presentations, documentations
 - Developement project → electronic resource management
 - Organization of German FOLIO community
 - German web side „<https://www.folio-bib.org/>“
- Continuous evaluation of software and requirements during development process



FOLIO opportunities and risks

- Systems concept: modular, flexible, and customizable
- Integration in higher education structures
- Possibility of „step by step“ implementation of single modules
= less fractions, less risk
- Systems architecture strictly open api's
 - Platform internal between the apps
 - External to 3rd party systems
- Enhanceable by localization and extra services, e. g. 3rd party services, local developed apps (self check app, open access app, ...)



FOLIO opportunities and risks

- Connection of various data sources
 - Standard metadata sources, e. g. union catalogues
 - Knowledge bases: commercial, cooperative
 - Linked open data
- Integration of future requirements
- Modern software stack
 - Recent technologies
 - Freedom of choice
 - Positive evaluation through OLE community – technical review team



FOLIO opportunities and risks

- Open Source
 - Open api's: quick, non proprietary addons possible
 - No vendor lock-in
 - Cooperative, transparent participation and developement – community owned
 - „Save haven“ of code (Apache 2.0 license) under the Open Library Foundation
- Data security, data safety, data ownership
- Self determination in information supply
 - Public service hosting possible
 - Library networks - proven, strong, collaborative partners in international cooperation



FOLIO opportunities and risks

- Cooperative development
 - „from libraries for libraries“
 - Comprehensive functional knowledge
 - Knowledge about recent and future requirements
 - Responsibility for development
 - In cooperation with commercial partners
 - Financial and management support
 - „Outcome oriented“ target settings ensure the necessary pressure for success and reliability



FOLIO opportunities and risks

- Achievement of an implementable version
 - Definition and prioritization of requirements and realization
 - Reliable and timely delivery of
 - Funding
 - Staff: developer and functional experts
 - Product owner, project manager / leadership
 - Planned software in scope and quality
- Consideration and realization of increased efforts in coordination and communication
- Security for sustainable development continuation



FOLIO opportunities and risks

- The platform in focus!
 - Isolated module migration possible
 - Open api architecture (internal and external)
 - Recent software stack
 - Microservice idea embedded in technology concept
 - Compatibility of public service and commercial interests
- = sustainable development possibilities of functionality and services for libraries in an innovative, self contained, consolidated concept!



FOLIO implementation

- FOLIO partner libraries as „early adopters“ in 2019
 - Texas A+M, Chicago, Lehigh, Chalmers, ...
 - Data migration concepts
 - OLE partner libraries will support each other
- Choice of business model
 - Local
 - Hosted / SaaS by public service providers, e.g. network headquarters or regional centers of excellence
 - Commercial SaaS, e.g. by EBSCO, Index Data, ...



FOLIO learn more

- Code on GitHub
<https://github.com/folio-org>
- UI prototype
<http://ux.folio.org/>
- Demo installation
<https://folio-demo.gbv.de/> + <http://folio-dev.hbz-nrw.de>
(diku_admin / admin)



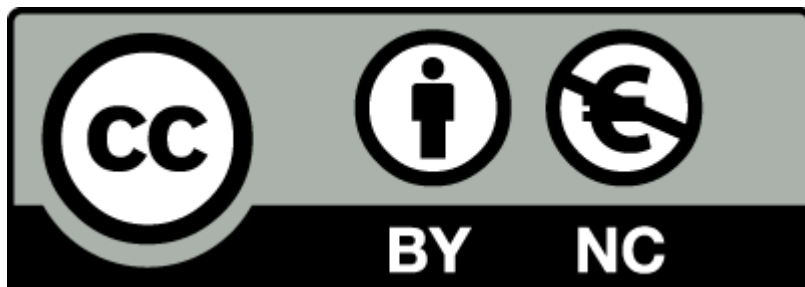
FOLIO learn more

- FOLIO Wiki
<https://wiki.folio.org/>
- OLE community
<https://www.openlibraryenvironment.org/>
- Open Library Foundation
<http://www.openlibraryfoundation.org/>
- FOLIO
<https://www.folio.org/>



Questions?

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Decisive for this presentation is the spoken word.