

FOLIO 101:

a new open source library services *platform*

FOLIO

The Future of Libraries is Open

Neil Block
Global Open Source Innovation
EBSCO

Why FOLIO?

CHANGE

in libraries

Emerging
Requirements

Changing Collections
and Metadata

Expanding into the
Enterprise



CONSOLIDATION

in library automation

Vendor Consolidation

Less Choice

Monolithic Systems



LSP Market



Forced packaging

Lack of choice

Platform Limitations

LSP Market



Forced packaging

Lack of choice

Platform Limitations



Market research and observation led to the FOLIO collaboration

What is FOLIO?



Community

Open Source

Modern

Modular

Supported

— FOLIO —

an open source LSP built to support ILS functions and to encourage community innovation



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FOLIO

The Future of Libraries is Open

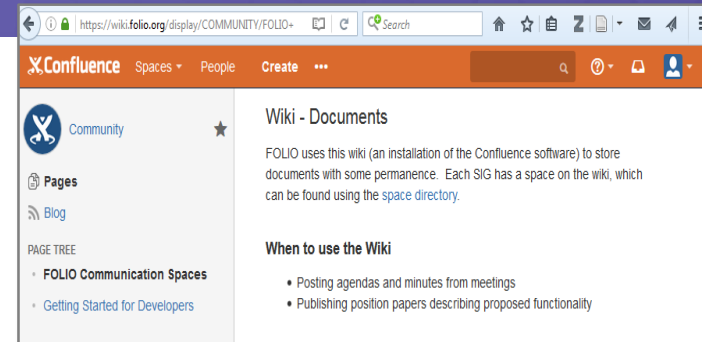
FOLIO is a diverse, global **Community** focused on innovation

- Academic Libraries
- OLE Partners
- Index Data
- EBSCO, SirsiDynix, ByWater, Stacks and other commercial service providers



Special Interest Groups (SIGs)

- Metadata Management
- Resource Access
- Resource Management
- UI / UX
- User Management
- Consortia
- Sysops and Management
- Reporting
- Privacy
- Internationalization
- Task Management



FOLIO Special Interest Group (SIG) Proposal for Engagement

Special Interest Groups (SIGs) provide a forum for FOLIO participants with similar technology needs, geographic area, or topical interest. The primary goal of some SIGs is to form consensus on FOLIO functionality through the creation of documents, reactions, and code snippets. Other SIGs will allow users to gather to exchange ideas, develop shared goals for the FOLIO project, and research and develop new interchange standards with widely used software. SIGs have space on the project wiki for meeting minutes, documents and design artifacts, forum and mailing list support, and access to conference call services. SIG members agree to abide by the [Code of Conduct](#). Each SIG appoints one or two facilitators; facilitators are responsible for coordinating meetings and ensuring that minutes are posted. Facilitators are also members of the SIG of SIGs to promote inter-SIG communication and coordination.

A SIG is created by through a Proposal for Engagement. The proposal contains the name of the SIG, a paragraph describing the purpose of the SIG, contact information for facilitators, the names of at least ten people who are members of the group, and (when appropriate) expectations for outcomes from the SIG. SIGs may revise their Proposal for Engagement at any time, and SIGs automatically renew each year when there is substantial activity in the preceding 12 months.

SIG Implementation

- Each SIG will be set up as a Confluence Space on wiki.folio.org and put into the 'SIG' category.

PARTICIPATE IN COMMUNITY DISCUSSIONS

Today ◀ ▶ April 2017

Month Week List Timeline Add Event

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|---|-----|--|---|---|-----|-----|
| 27 3:00 PM Resource Access SIG Meeting | 28 | 29 2:00 PM User Management SIG Meeting 3:00 PM The "Kabalog" 7:00 PM Weekly Facilitators SIG Call | 30 3:00 PM Resource Access SIG Meeting 4:00 PM Metadata Management SIG Meeting | 31 12:30 PM Resource Management SIG Meeting 1:00 PM Consortia SIG Meeting | 1 | 2 |
| 3 3:00 PM Resource Access SIG Meeting | 4 | 5 2:00 PM User Management SIG Meeting 7:00 PM Weekly Facilitators SIG Call | 6 3:00 PM Resource Access SIG Meeting 4:00 PM Metadata Management SIG Meeting | 7 12:30 PM Resource Management SIG Meeting 2:00 PM Consortia SIG Meeting | 8 | 9 |
| 10 3:00 PM Resource Access SIG Meeting | 11 | 12 3:00 PM Resource Management in FOLIO: A First Look 7:00 PM Weekly Facilitators SIG Call | 13 1:30 PM Product Council 3:00 PM Resource Access SIG Meeting 4:00 PM Metadata Management SIG Meeting | 14 | 15 | 16 |

- User Management SIG ...
 - UM SIG Meeting
- Resource Managem... ...
 - RM SIG Meeting
- Resource Access SIG ...
 - RA SIG Meeting
- Reporting SIG ...
 - RPT SIG Meeting
- Product Council ...
 - Product Council ...
- Privacy SIG ...
- Metadata Manageme... ...
 - MM SIG Meeting
- Forum Facilitators SIG ...
 - Events
 - Facilitators SIG Call
- Consortia SIG ...
 - Consortia SIG M...



Community

Open Source

_____ FOLIO _____

an open source LSP built to support ILS functions and to
encourage community innovation

Open Source Choices in Libraries



Figure 1: 'Kuali OLE logo' courtesy of the Kuali Foundation

FOLIO Open Source

- FOLIO software is released under an Apache 2 license
 - This allows FOLIO to be used by other organizations
 - FOLIO software is available on GitHub
- All FOLIO discussions and decisions are made in the open with community input and involvement
- FOLIO governance is through the Open Library Foundation, a not-for-profit organization
- “Open Source as a Service” support model



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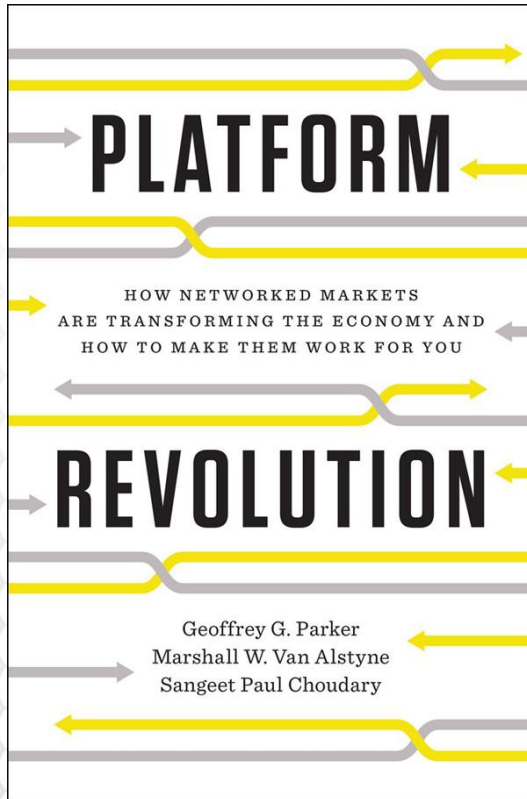
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What Makes FOLIO Modern?

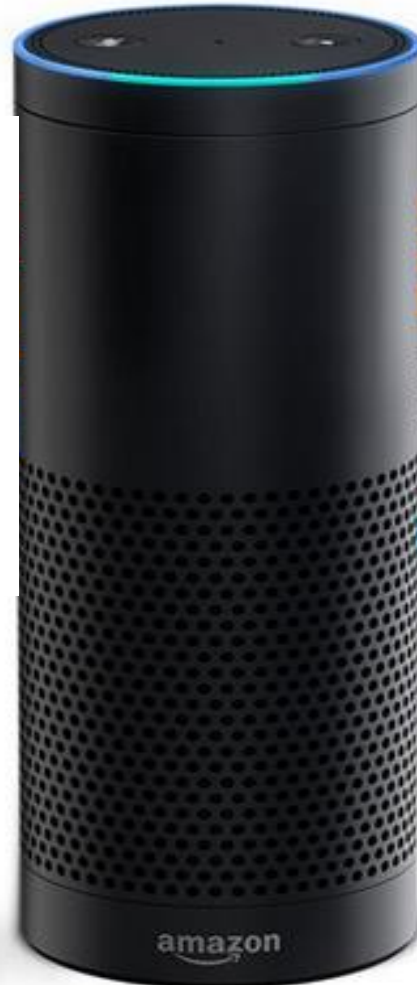
1. FOLIO is an open platform designed to facilitate engagement and contribution from partners
 - Supports many modes of implementation and deployment
2. Cloud-born, multi-tenant architecture
 1. Resource Management (e and p) is core to FOLIO
 2. First post-MARC library system, built to explore new models for bibliographic description and collaboration
 - FOLIO Codex, “Referential cataloging”

PLATFORM REVOLUTION



“a vibrant and healthy platform is dependent on the **value created by partners who are outside the platform itself**. If a platform is too closed, then partners cannot or will not contribute”

The Platform Economy



<https://developer.amazon.com/public/community/post>

The Platform Economy



<https://developer.amazon.com/public/community/post>



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App marketplace
Microservices architecture
Modules can be large or small

Modular Apps

built on an open, extensible platform



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FOLIO SERVICE BY EBSCO

- Formal Announcement later in 2017
 - Data migration
 - Cloud hosting
 - Project management
 - Implementation
 - Custom app development
 - Professional services (e.g. Value engineering)
 - Ongoing support, help desk
- Libraries can pick from multiple service providers or self-support

When will **FOLIO** be available?

FOLIO ROADMAP



2017: January-June

- Goals:
 - Onboard multiple independent development teams
 - Initial versions of apps
 - Integrate live KB
 - Workflow / UI design for apps
 - Documentation and framework
 - Resource Management workflow (e+p)
 - System operations
 - User management / Authentication

FOLIO ROADMAP



2017: July-December

- Goals:
 - Deliver Resource Management
 - Deliver System Operations
 - Deliver Systems Management
 - Deliver Authentication
 - Discovery integration
 - Kickoff selection, Workflow Management, Marketplace
 - Migrate beta library data for testing
 - User Guides
 - Begin to scale FOLIO service organizations

FOLIO ROADMAP



2018

- Goals:
 - Deliver FOLIO v.1 functionality
 - FOLIO by EBSCO Service and hosting operational
 - ILS partner service organizations trained
 - Initial libraries go live
 - Code self-sustainable by community
 - General availability

FOLIO Overview

EBSCO SaaS Suite (or others)

FOLIO LSP

Interoperability

Services

Discovery
(EDS, EDS API, FTF)

Resource Management
(HLM)

Selection & Ordering
(YBP, EBSCONET, ECM)

Analytics
(Usage Consolidation)

RPT AD
 M

CAT RM

Circ Acq

FOLIO Marketplace

ERP
Analytics
IR
ILS partners
Open Athens
LMS

FOLIO Services by EBSCO

FOLIO Services by Partners

Implementation, data migration, hosting, support

Discovery optimization

FOLIO Platform

EBSCO Knowledgebase | Third-Party KB

FOLIO

“ FOLIO represents a true partnership between libraries and vendors in which we are each making real substantive contributions based on our unique strengths.

For the first time, libraries will be not only customers but investors with vendor partners...”

David Carlson

Dean of Libraries, Texas A&M University

Thanks!

FOLIO

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Thank You !

FOLIO

The Future of Libraries is Open

Neil Block
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the *future* of libraries is

OPEN

I'd like to be a part of the community for the next generation open source library platform.

Full Name

Institution

Country

Email Address *

* Required Field

JOIN THE COMMUNITY

<https://www.folio.org>