

FOLIO

The Future of Libraries is Open

FOLIO Roadmap: Traveling Along a Winding Road Full of Possibilities

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Greetings from Lehigh University in Eastern Pennsylvania

Linderman Library



LEHIGH
UNIVERSITY

Greetings from FOLIO Product Council

FOLIO Product Council Charge

Primary functions for the Roadmap:

- **Synthesize roadmap, establish priorities in the roadmap, assesses strategic developments for impact on the roadmap**
- **Identifies functional gaps in the roadmap and acts to ensure the gaps are filled in collaboration with SIG groups**

OUTLINE

- ✓ Building upon OLE experience
- ✓ Roadmap development
- ✓ Functional Requirements
- ✓ How roadmap is evolving in the project
- ✓ Sprint Reviews and other information
- ✓ Closing thoughts – Project changes and early implementations

Kuali/OLE Lessons to inform new roadmap

- Best practices and lessons learned from Kuali OLE
 - Inflexible middleware / technical architecture
 - UX/UI was last consideration
 - Collaboration tools – Atlassian tools- confluence wiki, JIRA and meeting tools, google drive, listservs
- Started with conversations around new Technology Platform
- UX/UI designer and collaboration around UX/UI design
- Roadmap development: Examined some of OLE Documentation and German Catalogue of Requirements along with EBSCO's documentation

Library Requirements

- OLE lists of functionality
- German Requirements Catalogue
- SIG groups around functionality starting to form
- EBSCO created a spreadsheet of initial functionality by SIG group
- Review of functionality by each SIG group
- Creation of the Roadmap with prioritized features and some future features

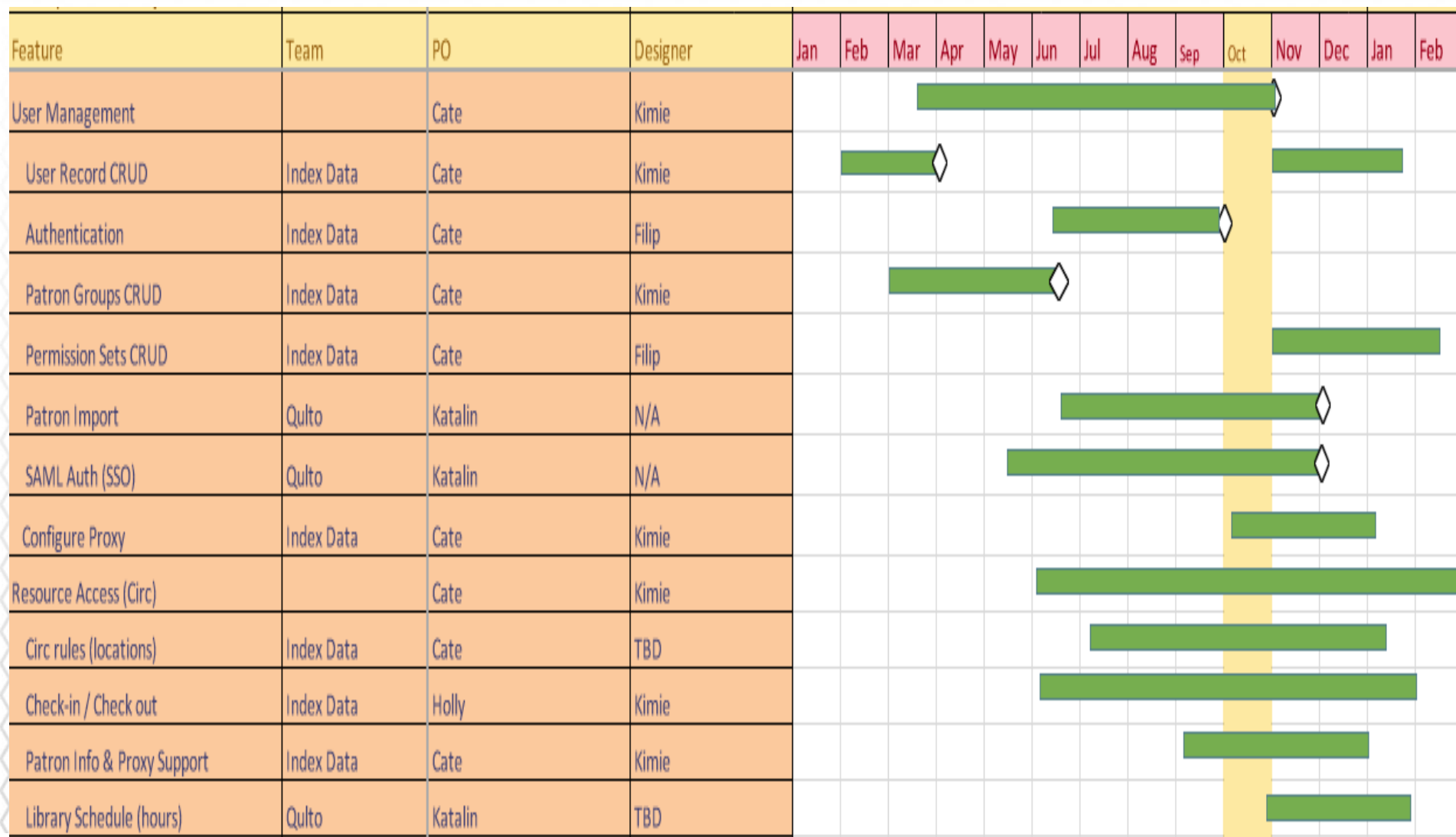
3.2 Metadata Management (print-, e- and digital resources) - Preliminary Version

Kriterium Criterion	Kriterium - Beschreibung Description of the criterion	Thema Topic	Konkrete Anforderung (deutsch) Requirement (German)	Konkrete Anforderungen (englisch) Requirement (English)	Bemerkungen Comments
		Workflow kooperative Zeitschriftenkatalogisierung work flow cooperative serial cataloguing	Workflows für die kooperative Katalogisierung von Zeitschriften (ZDB, EZB, Knowledgebase) werden unterstützt.	<i>Work flows for cooperative serial cataloguing (ZDB, EZB, Knowledgebase) are supported</i>	(vgl. auch Technik/Schnittstelle) (cf. also techniques/interfaces/
Katalogisierungsrichtlinie Cataloguing guideline	Unterstützung der RDA Support for RDA				
		RDA; Erschließung RDA; indexing	RDA (Resource Description and Access) wird unterstützt.	<i>RDA (Resource Description and Access) is supported</i>	
3.2.2 Datenformate 3.2.2 Data formats					
Metadatenformate Metadata formats	Unterstützung von Standard-Metadatenformaten - als Eingabe-, Import- und Exportformat Support for standard metadata formats as input, import and export format				
		MARC21, Eingabeformat MARC21, input format	Es wird ein benutzerfreundliches, vollständig mit MARC21 (einschließlich MARCXML) und RDA kompatibles Eingabeformat angeboten, das erweiterbar ist hinsichtlich neuer Anforderungen.	<i>It is offered an input format, which is user-friendly and completely compatible with MARC21 (incl. MARCXML) and RDA as well as extendible regarding to new requirements.</i>	
		MARC21, Dublin Core MARC21, Dublin Core	Die Austauschformate MARC21 (einschließlich MARCXML) und Dublin Core werden für Import und Export durchgängig unterstützt und sind erweiterbar hinsichtlich neuer Anforderungen.	<i>The data exchange formats MARC21 (incl. MARCXML) and Dublin Core are supported continuously for the import and export and are extendible regarding to new requirement.s</i>	

FOLIO Requirements: Metadata Management

Metadata Management	1	Create internal Folio metadata format	Define and establish internal data model for Folio metadata. This includes the ability to maintain a link to an original (rich) native metadata format which may have been used to create a record.	NC@Cornell: so do we need to clarify use cases the internal data model needs to support? Is this also where we discuss mappings from native formats? Add link here.
Metadata Management	1	Support for MARC record format	Import, parse and link to original MARC21 format data records. Includes support for MARC21 character sets as well as Unicode.	Do we need to be careful for other versions of MARC? JS@Duke: Yes, I think we will need to support other versions of MARC for internationalization. Also, I need to point out that even MARC21 encompasses more than one record type.
Metadata Management	1	Manual creation & edit of metadata record	User interface to manually create a metadata record - basic CRUD operations. Includes insertion and removal if fields and sub-fields. Record created based on selected template.	We also need suppress from display. Only catalogers can view and edit. This needs to happen at the holdings, title and item level. Needs to provide the ability to edit all records in the system. Patron, order, etc...NC@Cornell: ease of linking/relinking bib/holdings/item data also important (e.g. to support efficient remote storage operations). Merge into item 7. Move linking up as well. ss@Duke: another area is linking multiple bib records to a single holdings records (and the reverse, multiple holdings to a single bib.

FOLIO MILESTONES WITH ASSIGNED POs

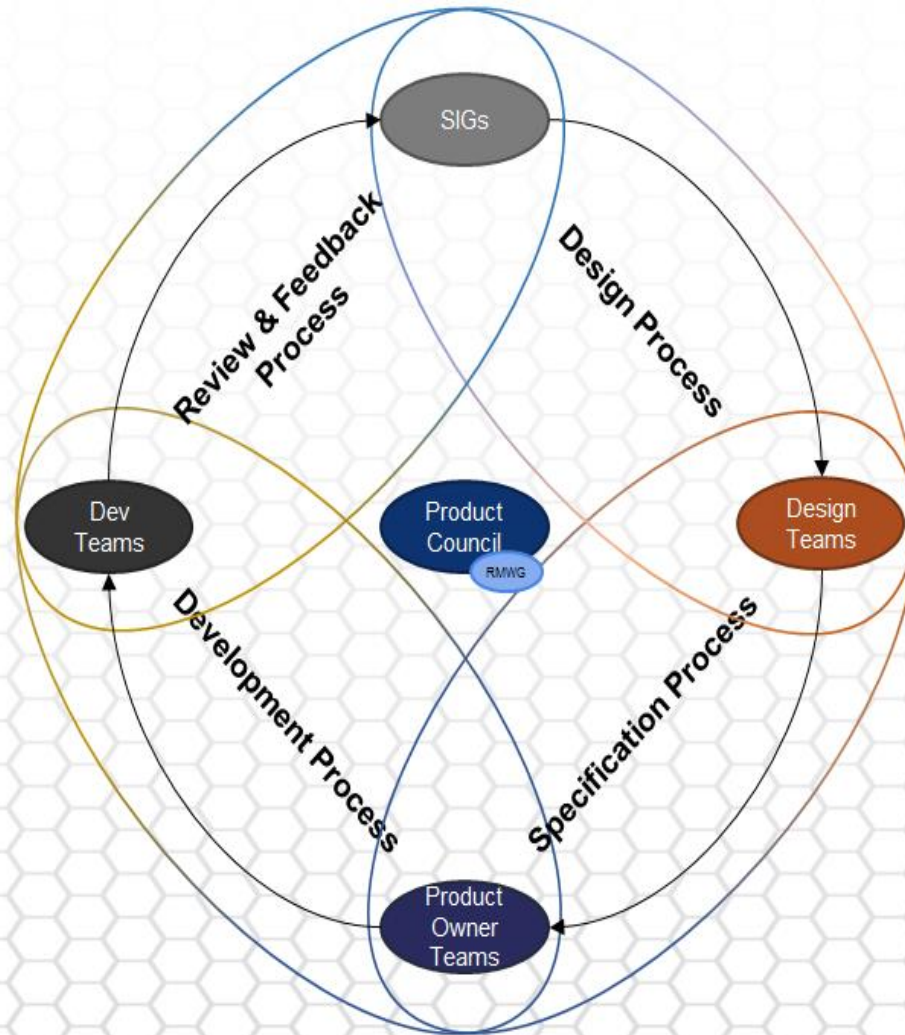


ROADMAP SCREEN

Requirements

Roadmap and Milestones

Product Owners (POs) & Agile Development



Development Teams

Team	Current Focus
Core Teams	User Management, Inventory, Codex Search, Resource Access & FOLIO Platform
OLE Team/K-Int (Knowledge Integration)	ERM Development: KnowledgeBase Integration, license, package and access management
Qulto	Calendar, Translation management tool
Frontside	eHoldings
Stacks	Acquisitions
UNAM	Fees and Fines (within Resource Access)
@Cult	Cataloging
EBSCO	Performance Testing, Usability Testing

USER MANAGEMENT

- User record CRUD (Create, Read, Update & Delete) functionality
- Proxy functionality
- Permissions CRUD
- Patron Group CRUD
- Patron Import
- Patron Authentication

Resource Access

- Loan Policies and Rules
- Check in and Check out with transactional data
- Renewals
- Fees and Fines
- Requests/holds
- Calendar integration for checkout/loan rules
- Patron notes, overrides, print slips

Metadata Management

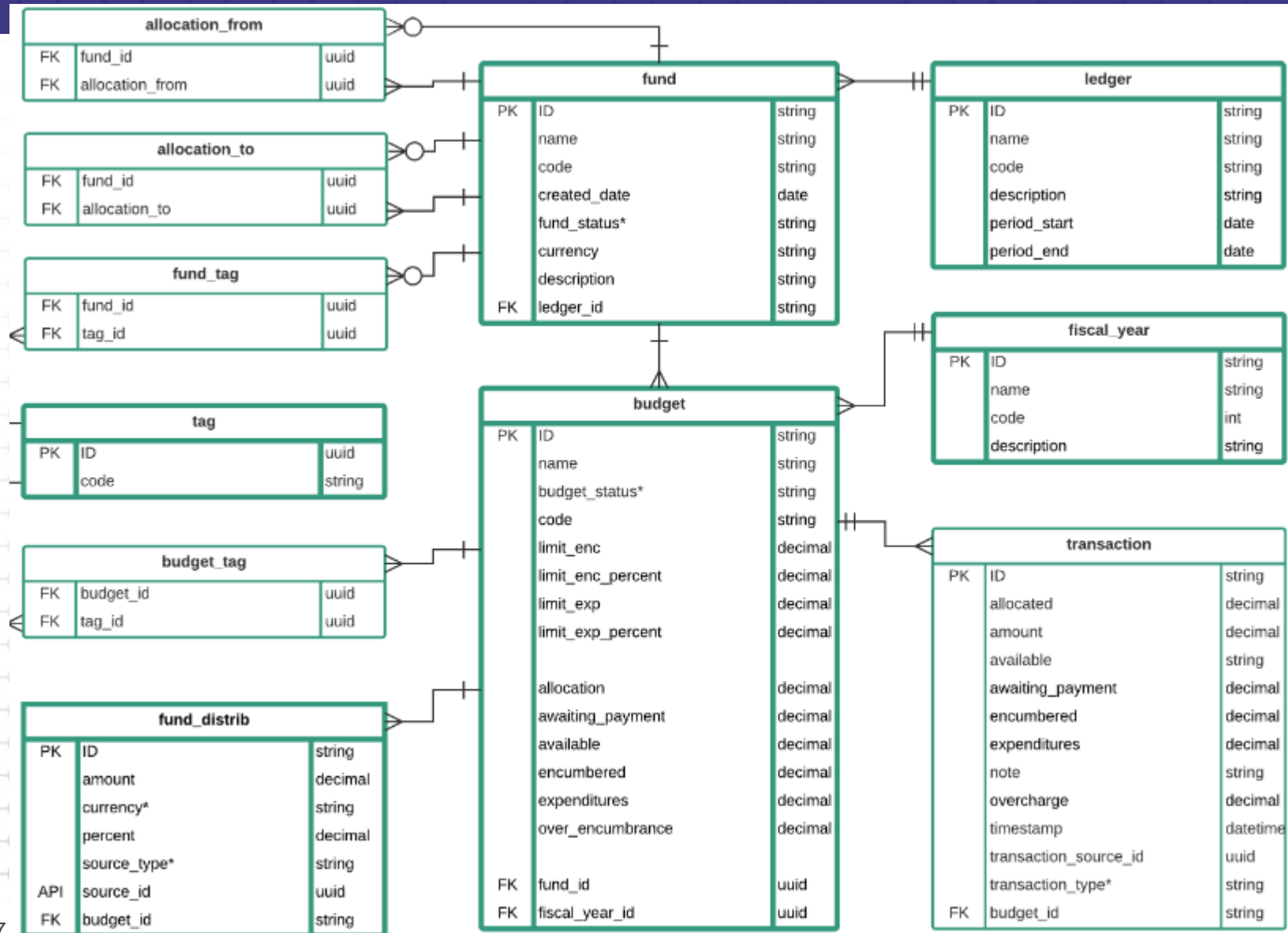
- Metadata management for MARC and support of all formats
- Import and export records
- Instance- items and holdings
- Search and filter
- CRUD for managing records
- Batch editing capabilities

Resource Management & ERM

- Orders and receiving
- Vendors
- KnowledgeBase integration
- Invoicing
- Finance- ledgers, funds and budgets, financial dashboard
- Renewal and cancellation
- Workflow management
- Packages and access management
- Holdings CRUD and import/export

FOLIO FORUM: [Acquisitions](#)
Openlibraryenvironment.org

Acquisitions: Ledger, Fund and Budget Model



Reporting

- Define data needs in reporting with SIGS and test report needs
- Data Lake concept
- Integrate reporting within apps

System Operations: Sys Ops

Platform and stripes configuration

Test KnowledgeBase integration

Meet accessibility requirements

Tenant level time zones across apps

Removal of hard-coded UI string, introduce HTML formatting for translation messages

Controlled Vocabulary component to consistently display settings for things like Patron Groups, Material Types, etc.

Accessibility & Testing

- Manual testing
- Automated testing
- Accessibility testing

ROADMAP Process

- Current review of Roadmap by Product Council
 - Identify gaps
 - Identify priorities
 - Scope of project
- Early implementers setting priorities with the Product Council
- Opportunities for others to develop code and features
 - ERM development- K-Int and OLE community
 - GOKb- German initiative to develop a new user interface and GOKb Steering Committee
 - Examining API to connect with existing tools
 - Innovative thinking: Resource Sharing and Research data

Roadmap enhancements using tools

[UXPROD Epics - Kanban](#)

(Jira Login requested)

[UX PROD Features – Kanban](#)

(Jira Login requested)

Sprint Reviews and FORUMS

[FOLIO Forums](#)- Quarterly update and the latest Roadmap update included the POs providing demos of the code development

Available on: www.openlibraryenvironment.org

Sprint Reviews are recorded and slides are available to the FOLIO project

What is coming

- Core Team

- Loan rules/policies continued (reference calendar opening days/times)
- Location assignment and CRUD UI
- Service Point (e.g. circ desks) CRUD UI
- Tags
- Hold slip (first print slip)
- Cancel fee/fine with override (first override)
- Export loans to csv (first table export)
- Open and closed loans (complete and bring inline with fee/fines UX)
- Extract hardcoded labels (continued work to support translation)
- Permanent and temporary locations on both holdings and items

What is coming

Stacks

- UI Orders
- Item Status Analysis
- EDIFACT invoices import analysis continued
- Finance Import/Export analysis
- Frontside – Development with EBSCO KB for now
 - Feature: Package Detail: Search within list of titles
 - Feature: Custom Packages to EBSCO KB
 - Feature: Custom Titles

What is coming

- UNAM

- Complete development of Open/Closed/All Fees/Fines (more changes have been identified)
- Complete development Fee/Fine Details (more changes have been identified)
- Start developing paying/waiving/cancelling fees/fines (user stories for paying and waiving should be ready for Sprint 37)
- Start developing fee/fines settings (user story should be ready for Sprint 37)

- @Cult

- Continue working on the UI module- cataloging app
- Continue services layer development

- Qulto

- Support creating multiple calendars & connect calendars with service points

Concluding thoughts

- Collaboration with development teams and resource growth=innovation
- Implementation plans will drive more prioritization of the roadmap and code development
- Outreach and Innovation grants allowing others to think about building Apps and APIs
- Micro-services encourages flexibility in implementations

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THANK YOU

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