



# FOLIO – More than a tailored library management system

**EBSLG Northern Group Meeting 2019**

Felix Hemme

ZBW – Leibniz Information Centre for Economics,  
Kiel/Hamburg

September 30 2019

**ZBW** Leibniz-Informationszentrum  
Wirtschaft  
Leibniz Information Centre  
for Economics



or

*“Traveling Along a Winding Road Full of Possibilities”*

---

Sharon Wiles-Young  
[Link to presentation](#)

Who we are ...





# Library Networks in Germany

- ZBW is part of GBV!
- Common Library Network is one of six library networks in Germany
- Host for regional union catalogue (collaborative cataloguing)
- Provides ILS, ILL, Discovery Systems + Indexes, ...

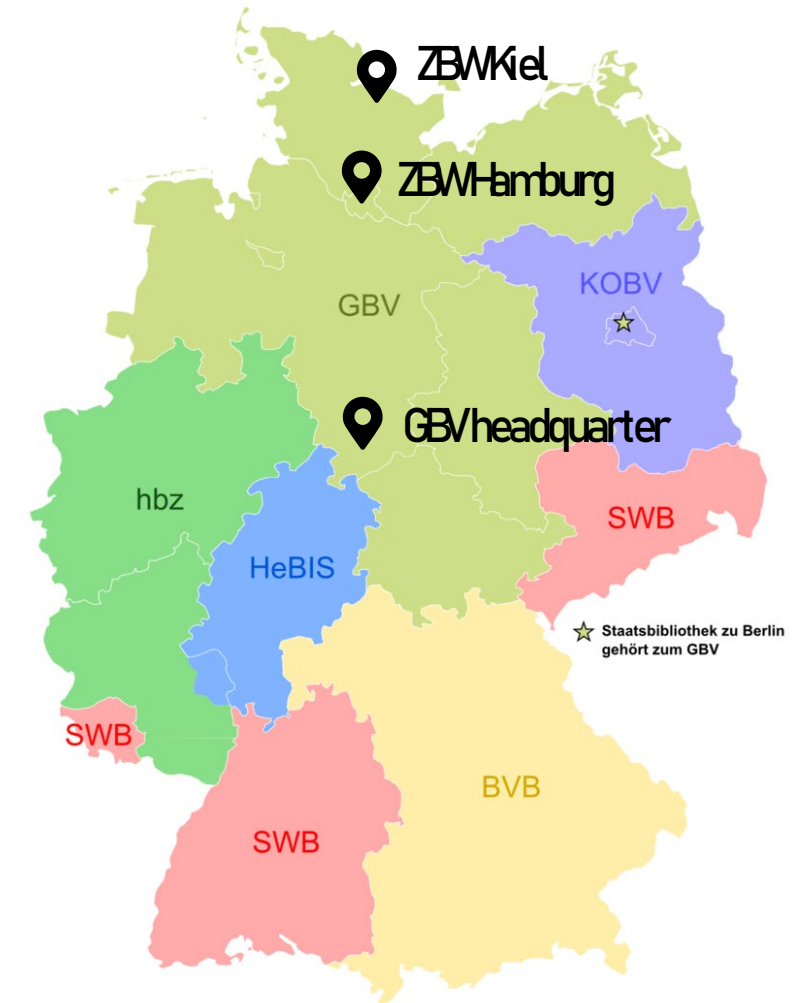


Image source: [https://de.wikipedia.org/wiki/Bibliotheksverbund#/media/Datei:Karte\\_Bibliotheksverb%C3%BCnde\\_Deutschland.png](https://de.wikipedia.org/wiki/Bibliotheksverbund#/media/Datei:Karte_Bibliotheksverb%C3%BCnde_Deutschland.png) (2019-09-23)

Map Marker by [Font Awesome](#) is licensed under [CC BY 4.0](#)

# FOLIO

## Overview and project structure





# FOLIO

- Development since 2016
- FOLIO is a product = software
- FOLIO is a community



Some of the colleagues involved in FOLIO development at Folio Days 2019 in Bremen, Germany



# FOLIO overview

- Aim
  - Develop an open source Library Service Platform (LSP) and build a new library management system *FOLIO* on this platform
  - Platform-based, open, viable, extensible, sustainable and flexible
- Organization of end user applications = Apps (microservices)
- Target Group
  - Academic and research libraries



# FOLIO overview

- Open for
  - Libraries
  - Commercial vendors
  - Service providers
- Administrative home: Open Library Foundation (OLF)
  - Umbrella organization since 2016
  - Lead by the OLF board
  - Projects: FOLIO, OLE, GOKb, ReShare





## Stakeholder – EBSCO

- Funding of contracted developer teams, e.g. 25 FTEs EPAM
- Own EBSCO human resources: product management, product owner, developer, UX/UI designer
- Financial support of OLF infrastructure
- Funding of external expert reports, e.g. technical evaluation (OTS report)



## Stakeholder – Index Data

- Software company specialized in creating products for libraries
- Provide product owner, developer and UX/UI designer
- Responsible for the basic technical architecture (LSP “Okapi”)



# Stakeholder – OLE Community

- Funding by membership fees and Andrew W. Mellon Foundation
- Funding of developers and OLE staff
- Own OLE human resources: product owner, functional experts (SMEs), developer
- Financial support of OLF infrastructure
- Support of OLE partner projects, e.g. ERM apps



# OLE Community

- OLE is a global library community



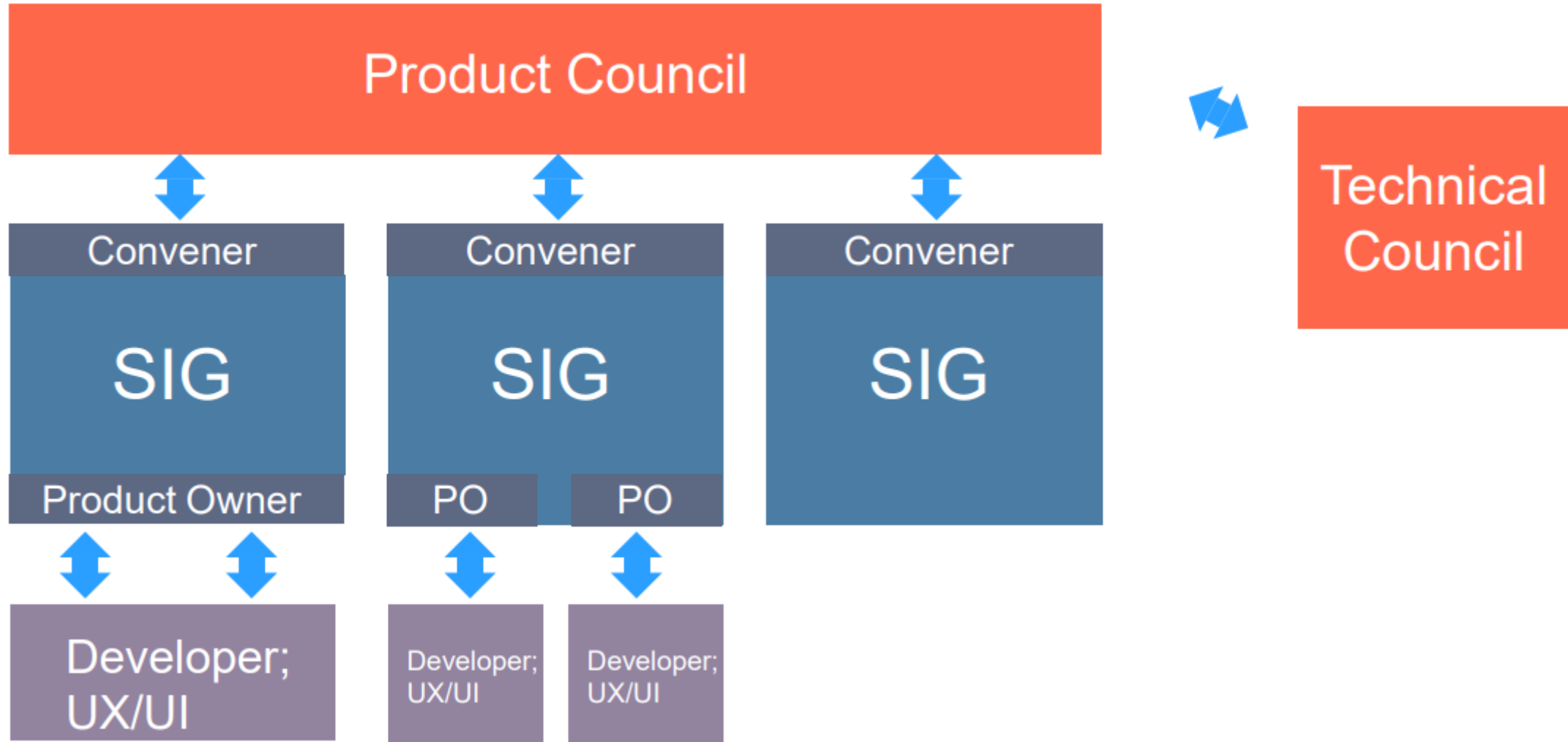
## Partner Institutions



UNIVERSITÄT  
LEIPZIG



# FOLIO Committees





# FOLIO Special Interest Groups

## SIGs and subgroups

- Metadata management
  - Data import / export
  - MARCCat
- Resource access
  - Loans, reserves, requests
  - Printing slips, Patron notices, calendar
  - Off-site integration
- Resource management
  - Acquisitions small group
  - App interaction group
  - ERM subgroup
- User management
- Internationalization
- Consortia
- Reporting
- Privacy
- Accessibility
- System operations and management
  - Data migration subgroup

# Developing an Electronic Resource Management (ERM) System





# ERM in FOLIO

- Our situation: Missing ERM systems for the German information infrastructure
- Number of heterogeneous digital publications increasing
- Isolated applications (Excel spreadsheets, email, Wiki)
- Solution: Extension of FOLIO with functionalities for the management of electronic resources
  - package management
  - license management
  - access management





# ERM project

- Generic app development in FOLIO Core
  - Initiative and funding: GBV (with the participation of the network libraries)
  - Development: K-Int, hbz, GBV, UBL, OLE
  - Subject-matter work: Participation from five networks and expertise from the ERM Sub-Group



# ERM project - goals

- Development ERM functionality in FOLIO
- Realization of the incremental implementation (current ILS + ERM)
- Evaluation
  - Software development in FOLIO
  - Professional and technical cooperation (national and international)
  - The prioritization and decision-making processes in FOLIO
  - From usage and implementation scenarios, e.g. parallel use with existing ILS, modular migration

# State of development



# State of development



- Current public release: Daisy (Q3.2)
- Enhancing basic functionalities:
  - Cataloguing, Inventory management
  - Acquisition incl. eResource management
  - User management, circulation
  - Statistical analysis

Search & filter

Search

- Reset all**
- Status**
- Inactive
  - Active
- Patron group**
- faculty
  - graduate
  - staff
  - undergrad

**Users** 155 records found New

Status	Name	Barcode	Patron group	Username
Active	ADMINISTRATOR, DIKU		?	diku_admin
Active	Auer, Darius	997383903573496	undergrad	leslie
Active	Auer, Luther	680311830975018	staff	graham
Active	Bayer, Zora Shea	737503980446128	graduate	austin
Active	Becker, Jazmin	194710970216014	faculty	cedrick
Active	Bednar, Albin Gail	720909484081527	undergrad	gilbert
Active	Bernhard, Cordell Mafalda	631888472578232	faculty	sunny
Active	Block, Araceli Avery	217874037910807	graduate	josefa
Active	Block, Madyson	33336807737811	undergrad	quentin
Active	Boehm, Elyse Misty	979553133418729	staff	dominic
Active	<b>Borer, Dagmar</b>	<b>509575459201574</b>	<b>undergrad</b>	<b>zena</b>
Active	Bosco, Ronny Rolando	685625879486391	graduate	alberto
Active	Braun, Aleen	548755241194417	staff	johan
Active	Brown, Pietro Brigitte	236964750970123	undergrad	vida
Active	Cartwright, Katrina Jean	591740048987109	faculty	cleta
Active	Champlin, Darrell	503862344388601	staff	leone
Active	Christiansen, Katlynn May	775849269788032	faculty	winnifred
Active	Cole, Evalyn Randy	539526509780788	undergrad	justen
Active	Conn, Ceasar	775671613439016	undergrad	federico
Active	Cronin, Claud Ilene	517661950521777	staff	mathew
Active	Crooks, Ryder	251565120881853	graduate	amy
Active	Dach, Colt Alford	322526636349373	graduate	maymie
Active	Denesik, Domenick Maybelle	592809378069983	faculty	kathryn
Active	Denesik, Doug Alf	693787594998493	staff	kayla
Active	Denesik, Geovanni Columbus	555048703191946	faculty	elinor
Active	Denesik, Laurianne	865397063334345	undergrad	julio
Active	Denesik, Leonor Lyric	937814009886828	faculty	imelda

**Borer, Dagmar**

**User information**

Record last updated: 9/25/2019 1:25 AM

**Last name**: Borer  
**First name**: Dagmar

**Patron group**: undergrad  
**Status**: active

**Patron blocks**

**Extended information**

**Contact information**

**Proxy/Sponsor**: 0

**Fees/Fines**: 0

**Loans**: 0

**Requests**: 0

**User permissions**: 0

**Service points**: 3

**Notes**: 0

- Agreements
- Check in
- Check out
- Data import
- eHoldings
- eUsage
- Inventory
- Invoice
- Finance
- Licenses
- Local KB Admin
- Orders
- Organizations
- Requests
- Codex search
- Users**
- Settings

# Speaker

Felix Hemme

works as a metadata and systems librarian at the ZBW – Leibniz Information Centre for Economics in Kiel, Germany. He supports FOLIO's development as member of the Metadata Management SIG and the ERM Sub Group.

[f.hemme@zbw.eu](mailto:f.hemme@zbw.eu)



# Learn more about FOLIO

- FOLIO: <https://www.folio.org/>
- Demo installation: <https://folio-demo.gbv.de/> (diku\_admin / admin)
- UI prototype: <http://ux.folio.org/>
- FOLIO Wiki: <https://wiki.folio.org/>
- FOLIO developer: <https://dev.folio.org/>
- Code on GitHub: <https://github.com/folio-org>
- FOLIO Discuss: <https://discuss.folio.org/>
- OLE Community: <https://www.openlibraryenvironment.org/>
- Open Library Foundation: <http://www.openlibraryfoundation.org/>
- Martina Tumulla and Julian Ladisch: Improving FOLIO Architecture. Presentation from the ELAG Conference, Berlin 2019: [https://www.gbv.de/Verbundzentrale/Publikationen/publikationen-der-vzg-2019/pdf/Ladisch\\_Tumulla\\_190508\\_Improving\\_FOLIO\\_Architecture.pdf](https://www.gbv.de/Verbundzentrale/Publikationen/publikationen-der-vzg-2019/pdf/Ladisch_Tumulla_190508_Improving_FOLIO_Architecture.pdf)



## Thank You.

The text of this presentation is published under the Creative Commons Attribution 4.0 International (CC BY 4.0) license: <https://creativecommons.org/licenses/by/4.0>

Excluded are graphics, screenshots and images from other authors, whose respective rights and license conditions continue to apply.

The spoken word is authoritative for this presentation.

