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
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, …


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FOLIO
Overview and project structure
FOLIO

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

The photo has been removed from the published slides.

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
FOLIO Committees

Product Council

Convener

SIG

Product Owner

PO

Developer; UX/UI

Technical Council
# FOLIO Special Interest Groups

## SIGs and subgroups

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- **Metadata management**
  - Data import / export
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- **Resource management**
  - Acquisitions small group
  - App interaction group
  - ERM 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
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Speaker

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Learn more about FOLIO

- FOLIO: [https://www.folio.org/](https://www.folio.org/)
- Demo installation: [https://folio-demo.gbv.de/](https://folio-demo.gbv.de/) (diku_admin / admin)
- UI prototype: [http://ux.folio.org/](http://ux.folio.org/)
- FOLIO Wiki: [https://wiki.folio.org/](https://wiki.folio.org/)
- FOLIO developer: [https://dev.folio.org/](https://dev.folio.org/)
- Code on GitHub: [https://github.com/folio-org](https://github.com/folio-org)
- FOLIO Discuss: [https://discuss.folio.org/](https://discuss.folio.org/)
- OLE Community: [https://www.openlibraryenvironment.org/](https://www.openlibraryenvironment.org/)
Thank You.

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