folio

future of libraries is open

Open Source : Library Services Platform (LSP)

Owned by everyone, Owned by no one

AMICAL 2019

American University in Cairo

29 March – 1 April | Cairo - Egypt

@FOLIO_LSP

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EBSCO and others are funding the creation of an open source Library Services Platform (LSP): **FOLIO**

FOLIO will include full-featured ILS/LMS functionality and will be extensible to support add-on modules.

Why FOLIO?

Our industry has witnessed a trend toward vendor consolidation, resulting in:

- Less choice
- Closed systems
- Less innovation
- Higher costs

The FOLIO goal is

- More choice
- Open systems
- More innovation
- Lower cost

If some ILS vendors ruled the grocery store

*Cartoon inspired by
Tom Fishburn's "If Cable TV Providers Ruled the World"

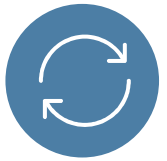
Open Source means….

OPEN INNOVATION

Open innovation means choice of vendors and applications

MICROSERVICES ARCHITECTURE

Microservices architecture means easier to develop and innovate



VIBRANT ECOSYSTEM

Vibrant ecosystem means many participants

choice + openness
=
healthy market

The FOLIO Community

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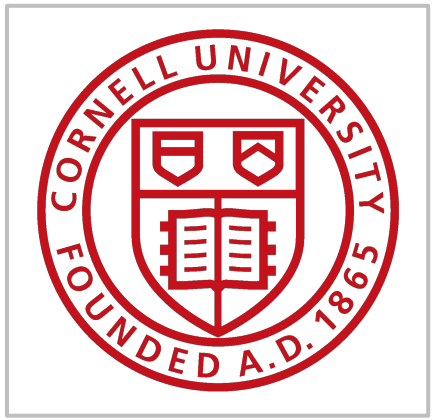
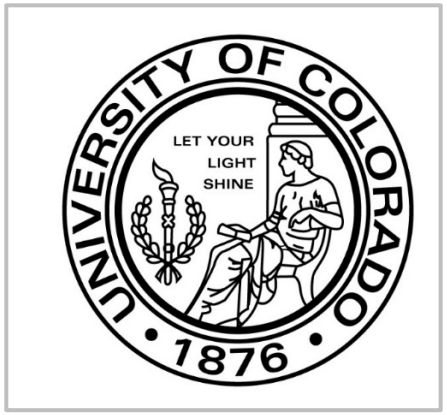
FOLIO is a
COMMUNITY
of peers including:
academic libraries,
OLE Partners,
Index Data, EBSCO
& others

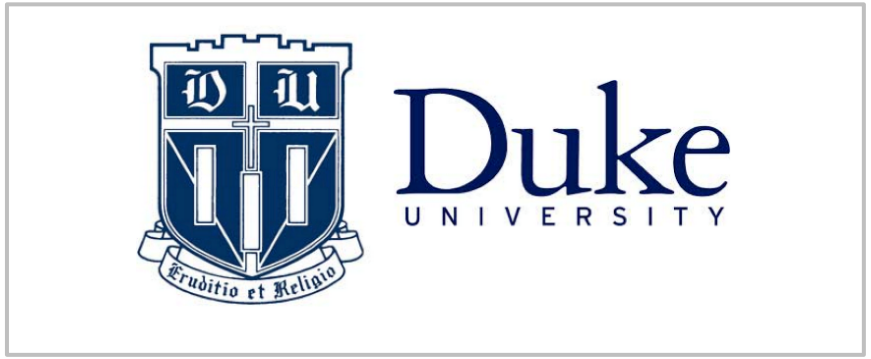
Owned by everyone, Owned by no one

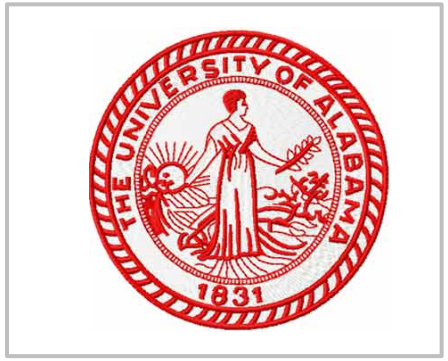
OLE Open Library Environment
Stacks
GOKb Global Open Knowledgebase
EBSCO Information Services
FRONTSIDE
SirsiDynix
qulto discovering collections
INDEXDATA
Jisc
ByWater SOLUTIONS

FOLIO: The Engaged Community is Growing









FOLIO: The Engaged Community is Growing

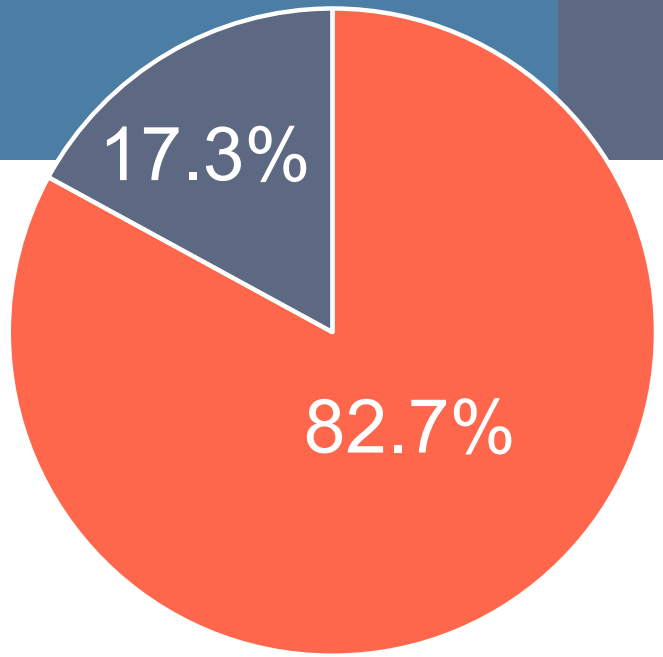
FOLIO Community Involvement

as of May 2018

Website Metrics

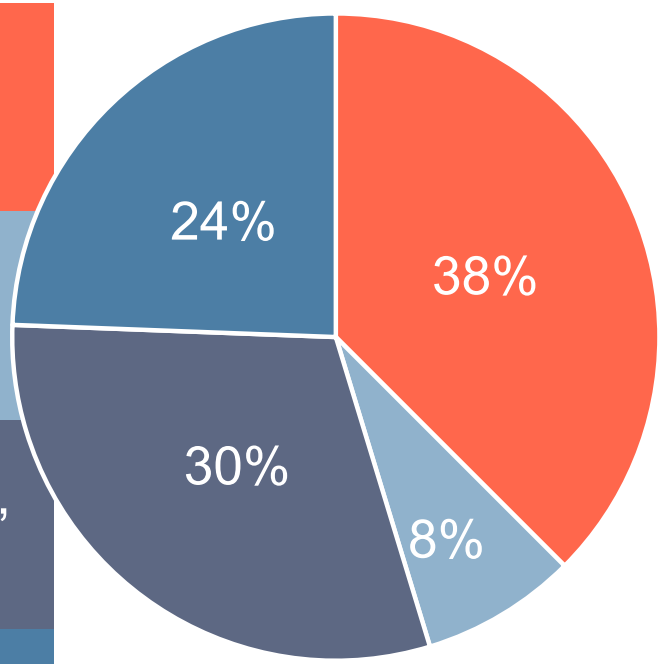
45,782 users

169,445 page views



Newsletter Signups

- North America
- Latin America
- Europe, Middle East, Africa
- Asia, Australia, Oceania



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Development Team

Core development team:
Index Data, Knowledge Integration, OLE and EBSCO

Collaboration through open tools:
issue tracker, wiki, forums, Slack, GitHub

Biweekly check-ins and coordination:
“lightweight agile”

Other Development Groups

- Auburn University, USA
- China Academic Library and Information System (CALIS), China
- Frontside, USA
- Instituto Brasileiro de Informação em Ciência e Tecnologia (IBICT), Brazil
- QULTO, Hungary
- SirsiDynix, USA
- Stacks, Canada
- The University of the West Indies (UWI), Jamaica
- Universidad Nacional Autónoma de México (UNAM), Mexico

FOLIO Development Languages

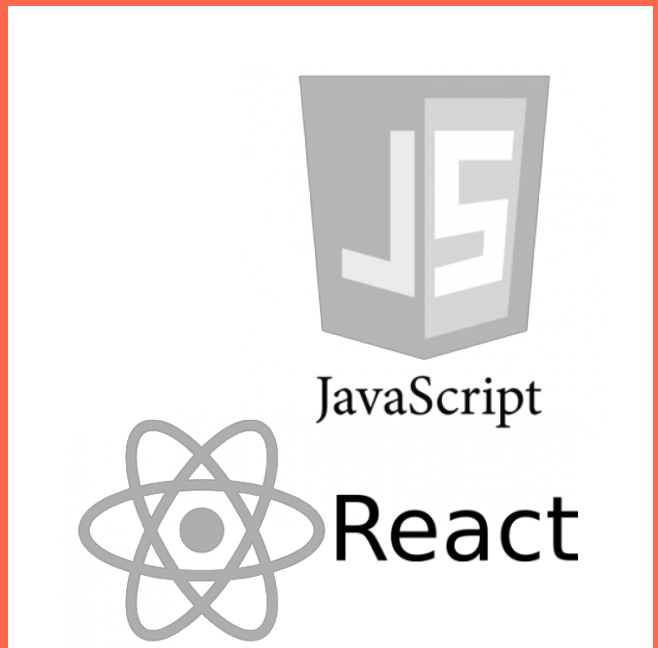
Almost any modern language can be used

Gateway/Backend Modules

The core ecosystem is Java, vert.x, JavaScript and node.js, supporting the system modules and gateway.

App & Connector Modules

Building blocks for the App and connector modules can use a number of languages.

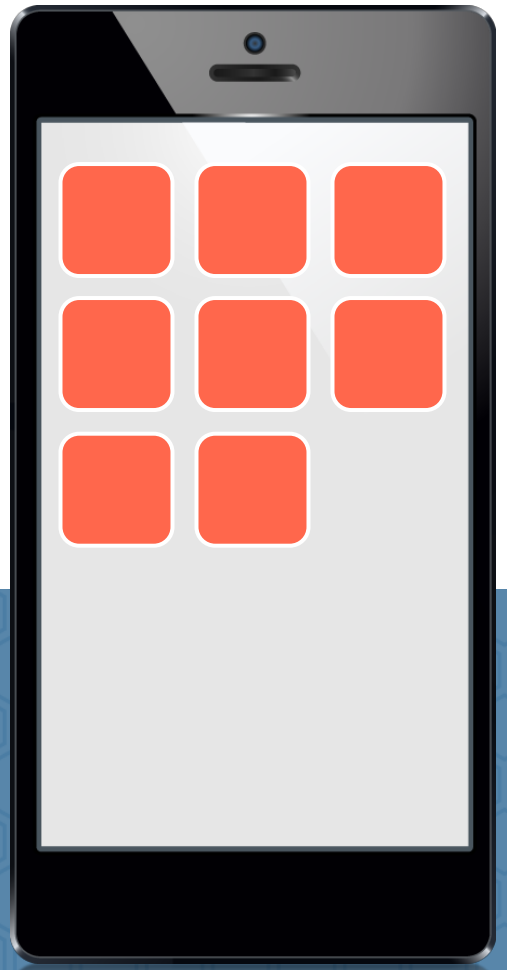


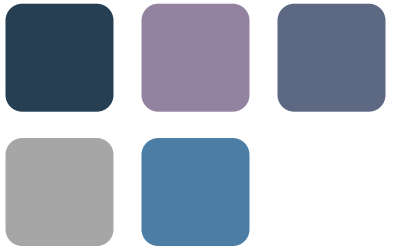
Frontend User Interface

FOLIO's user interface is a template driven single page application built with React and JavaScript.

Modular

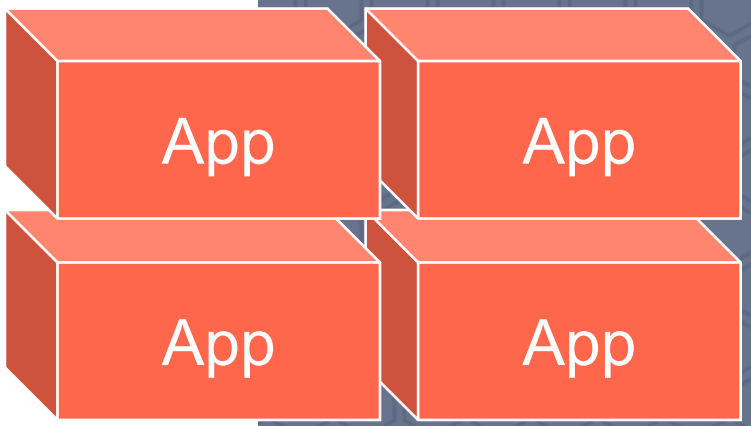
Choose apps





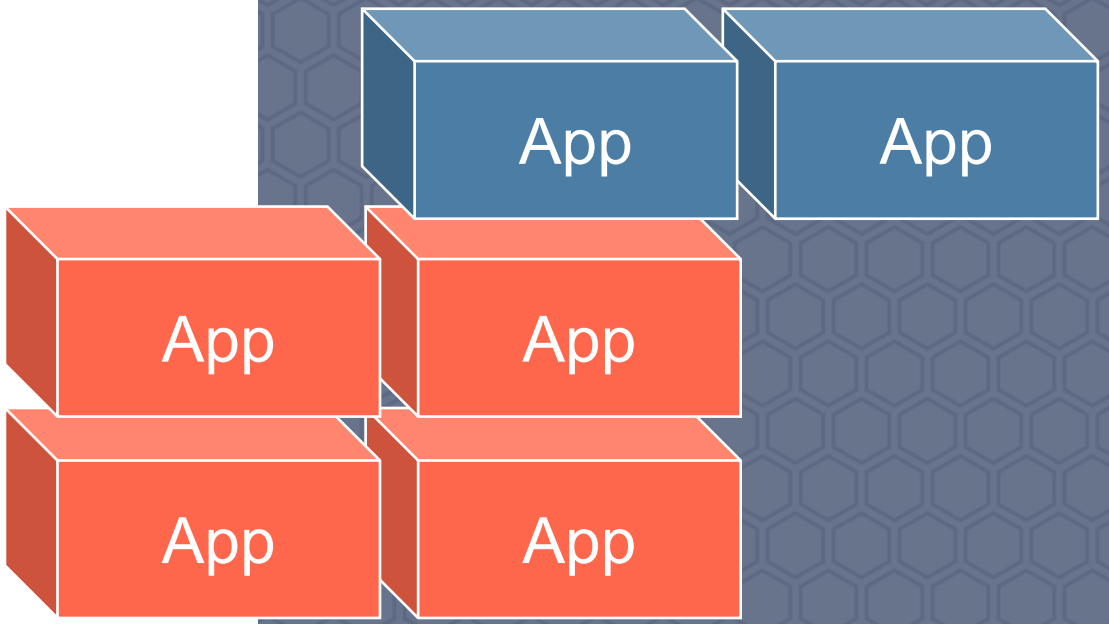
Base Applications

- Acquisitions
- Cataloging (Metadata Management)
- Circulation (Resource Access)
- Electronic and Print Management (Resource Management)
- Knowledge base
- Migration Tools
- OPAC Functionality
- Resource Sharing



Extending into new areas

- Content Management Systems
- Data Mining
- Grant Management
- Institutional Repositories
- Learning Management Systems
- Linked Data
- Predictive Analytics
- Research Data



Platform of Choice

- APIs throughout
- Completely open
- Anyone can build apps

Hosting by Libraries

Any library may load and operate FOLIO code locally

Completely free for the library,

except for staff and hosting / server expenses

FOLIO Other Benefits

- Better products with library involvement
- Microservice architecture leads to more innovation
- Greatly lowered annual ILS costs
- More choice for libraries based on their particular needs
- Risk mitigation
- Massive development power of the entire community

FOLIO Services from EBSCO (FSE)

serving as an extension to your team's library services and systems experts

Implementation

Hosting, maintenance, support

Professional services

EBSCO Services

1

Implementation will be a one-time fee in the first year of adoption

EBSCO Services

2

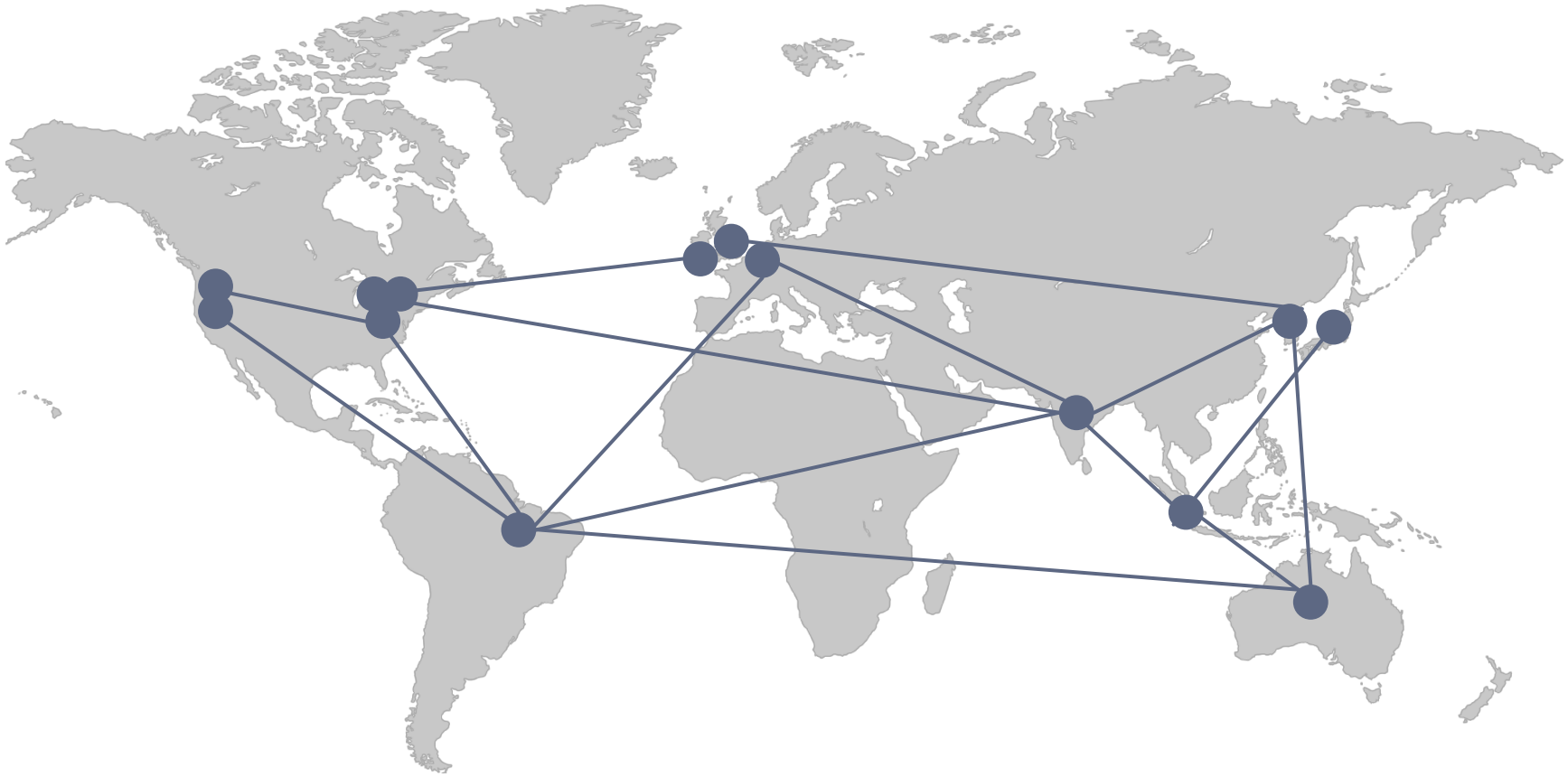
Hosting, service & support is anticipated to be roughly half the cost of commercial offerings

EBSCO Services

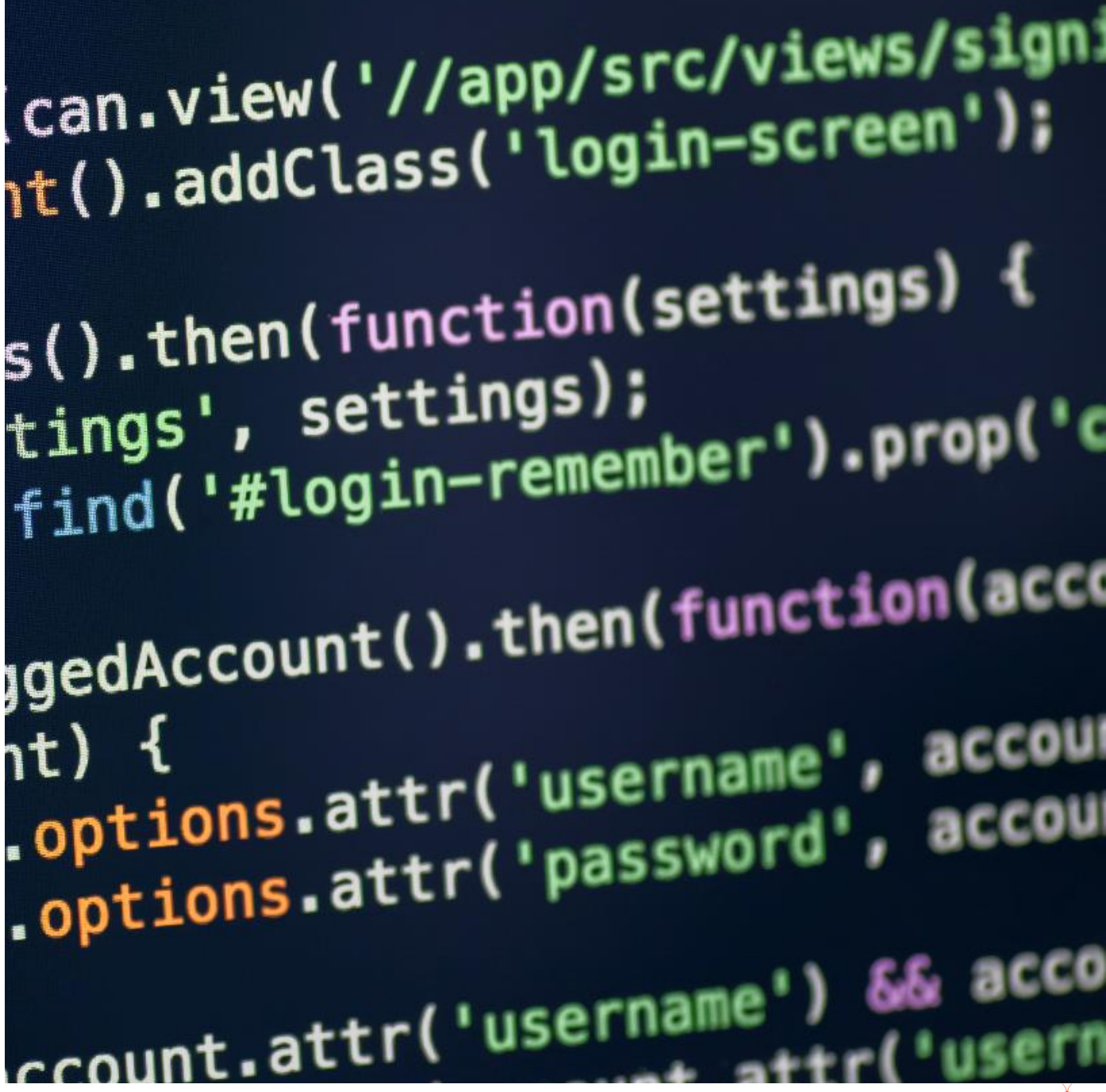
3

Training will be available upon request at an hourly rate plus travel expenses

Global Infrastructure will be available for hosting discrete data centers, redundant power, networking and connectivity



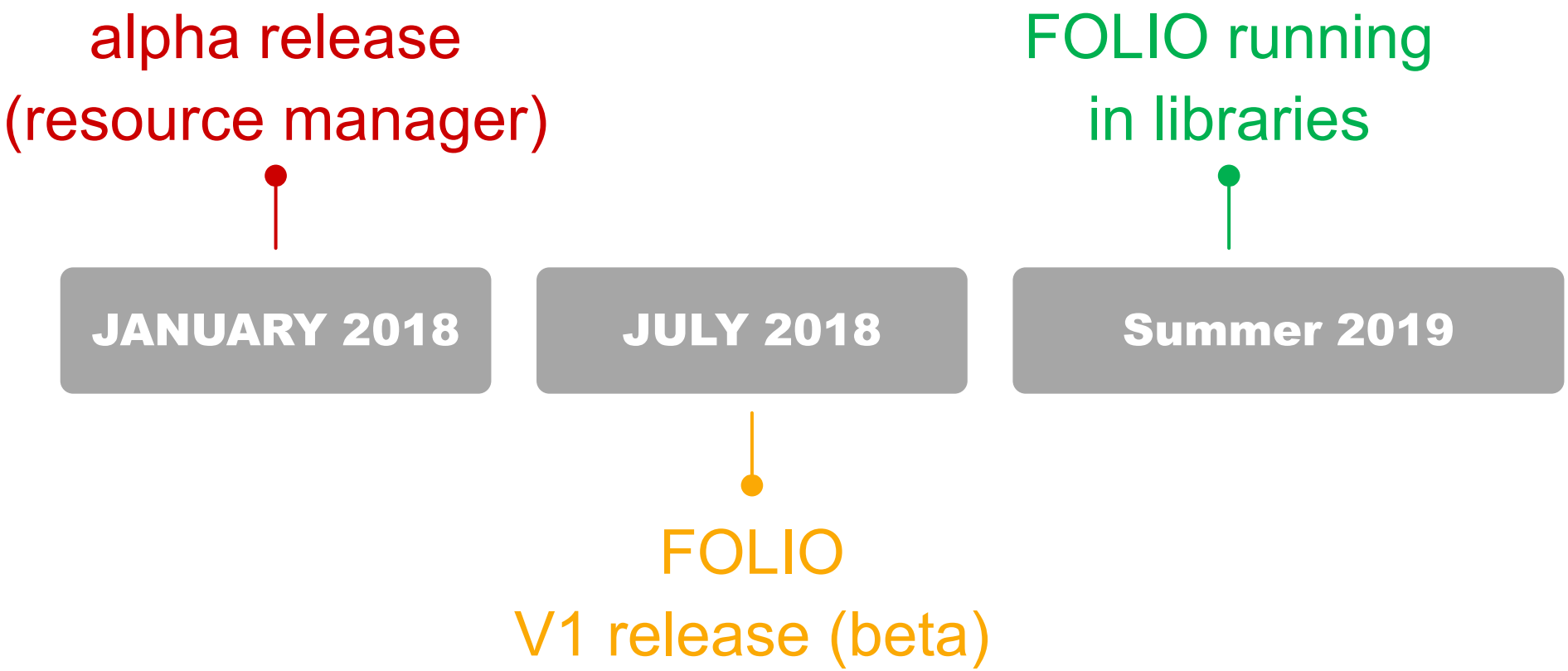
FOLIO will be
available under an
APACHE 2 LICENSE
the most
permissive license



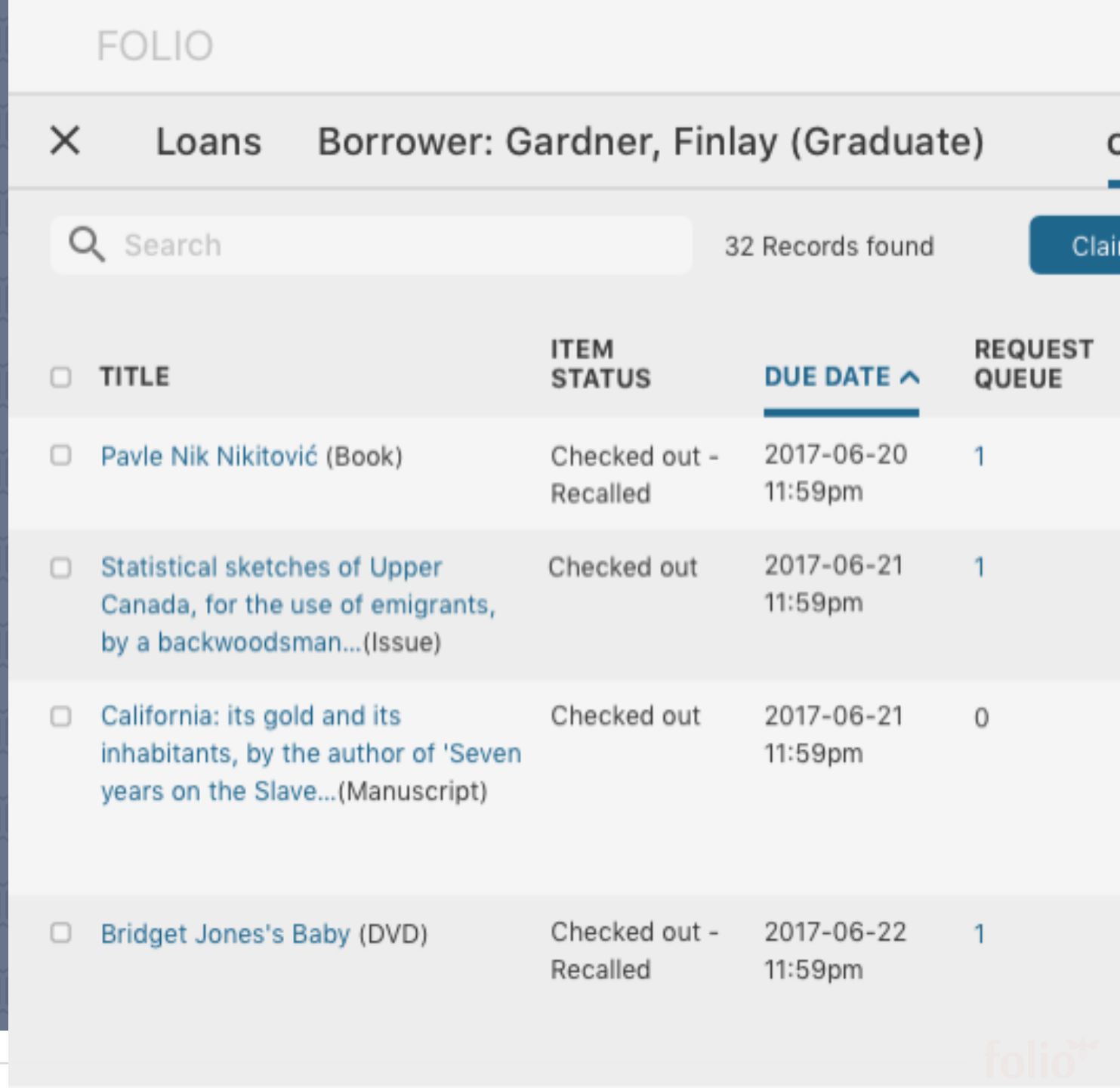
Software is rapidly taking shape

V1 Beta released Summer 2019

FOLIO Milestones | Timeline



For example, circulation (resources access)



Open Loans | Closed Loans

m returned | Renew | Change due date | Lost | Charge fee

BARCODE	FINE	CALL NUMBER	AUTHORS	RENEWAL COUNT	LOAN POLICY	LOCATION
37696876	0	PS3607.R54842 H54 2015	Matthew Williamson	6	14 Days	Main Library
69077747	1.00	QH332 .A48 2008 v.1 c.2	Timothy Black, Stephanie Carpenter...	2	14 Days	
69228882	2.00	Div. Sch. TP248. 3 .I56 v.14:pp. 1199+1728 (1996) c.1		1	7 Days	
453987605	0	Marine QC173.55 .C66 v. 4:suppl. 1+2(2003) c.1	Christopher Rios	6	7 Days	

Timothy Black, Stephanie Carpenter, Gizi Croft, Rhea Leslie, Titilayo Del Olmo, Helena Nicholson, Kennet Jacques, Emira Kóbor

- Loan details
- Claim returned
- Renew
- Change due date
- Lost
- Charge fee
- Cancel loan

You do not have permission for this feature but an override is provided.

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Different ways to participate

www.folio.org

From staying informed to actual coding:

- Forums
- Meet-ups
- Newsletters
- Wiki
- Special Interest Groups (SIGs)
- And more

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Questions?