

FOLIO:

Redefining the Library Services Platform (LSP) from the inside out

FOLIO

The Future of Libraries is Open

Neil Block

Vice President, Global Open Source Innovation

nblock@ebSCO.com

CONSOLIDATION

In library automation

Vendor Consolidation

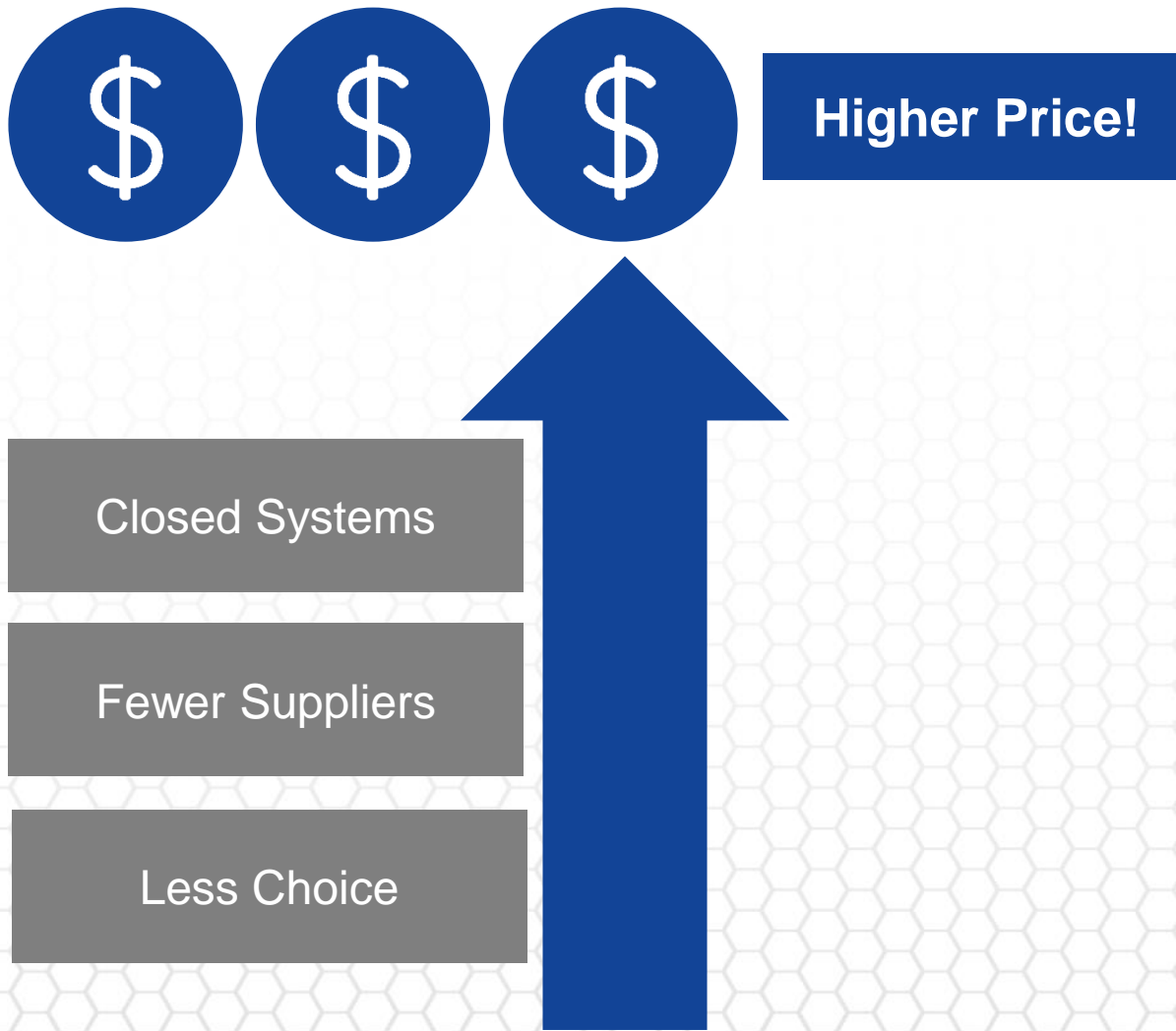
Fewer ILS Options

Monolithic Systems

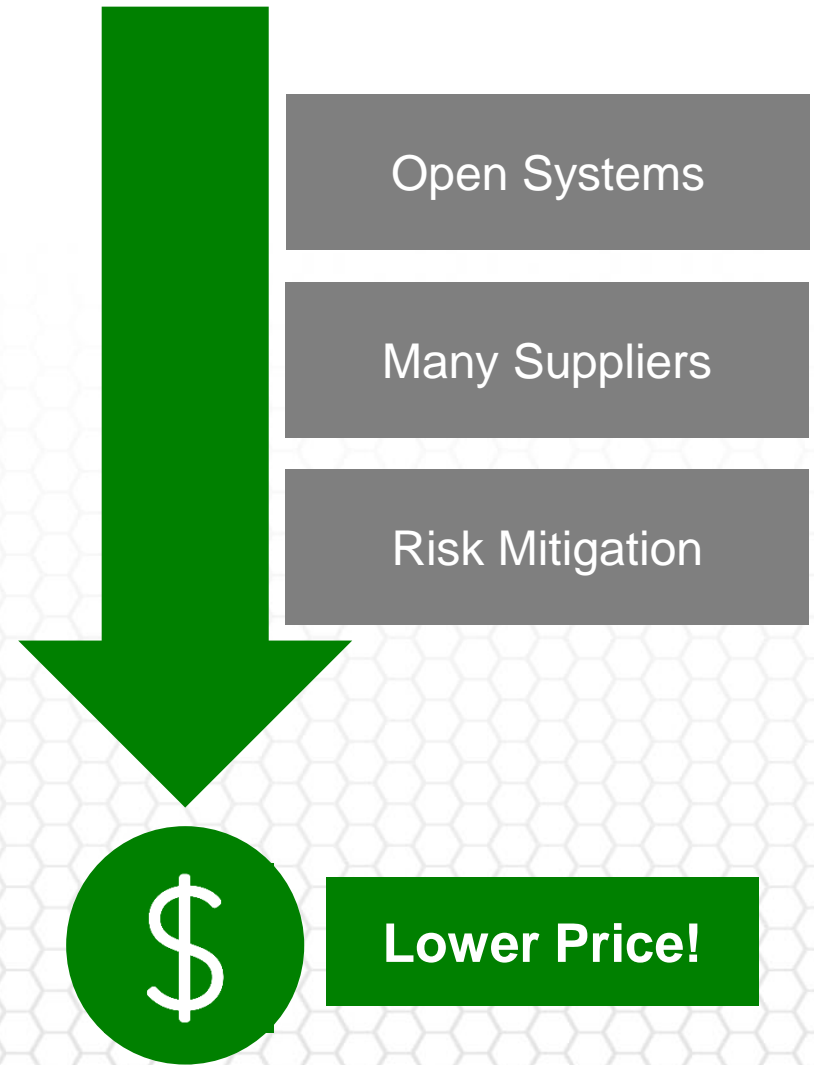
Monolithic System: a solution in which functionally distinct modules are interwoven **(or packaged together for marketing purposes)**, rather than opened up via APIs to marketplace competition.

FOLIO

The Future of Libraries is Open



Current LSP Market

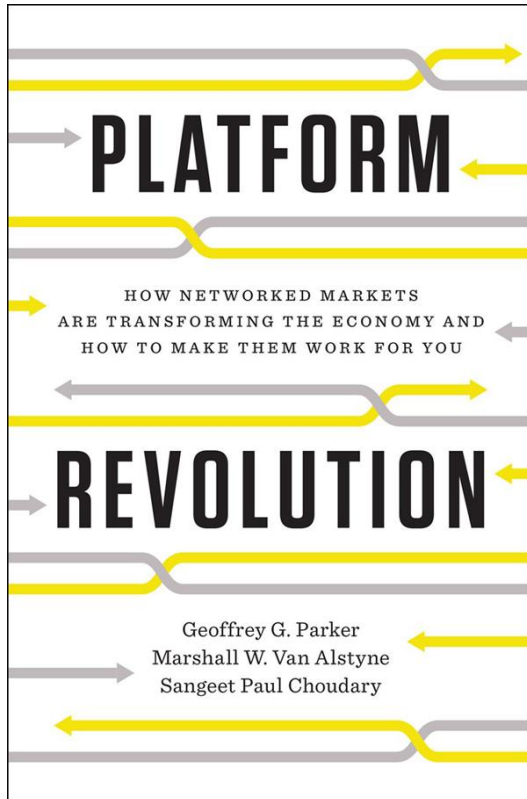


Preferred LSP Market

Isn't it time for Library Services Platforms to deliver on their promise of open systems and interoperability?

“Library Services Platform”...enable the library to perform its services, internally and externally through their built-in functionality, as well as exposing a platform of Web services and other APIs for interoperability and custom development.

Marshall Breeding: Library Services Platforms, a Maturing Genre of Products. Library Technology Reports. May/June 2015, vol. 51/no 4



“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”

Will Platform Businesses Eat Library Systems?

Amigos Online Conference
Reimagining the ILS. 15/09/2016

Ken Chad
Ken Chad Consulting Ltd
Twitter @kenchad
ken@kenchadconsulting.com
Tel: +44 (0)7788 727 845
www.kenchadconsulting.com



Ken Chad Consulting helping create more effective libraries.....

The world has evolved.

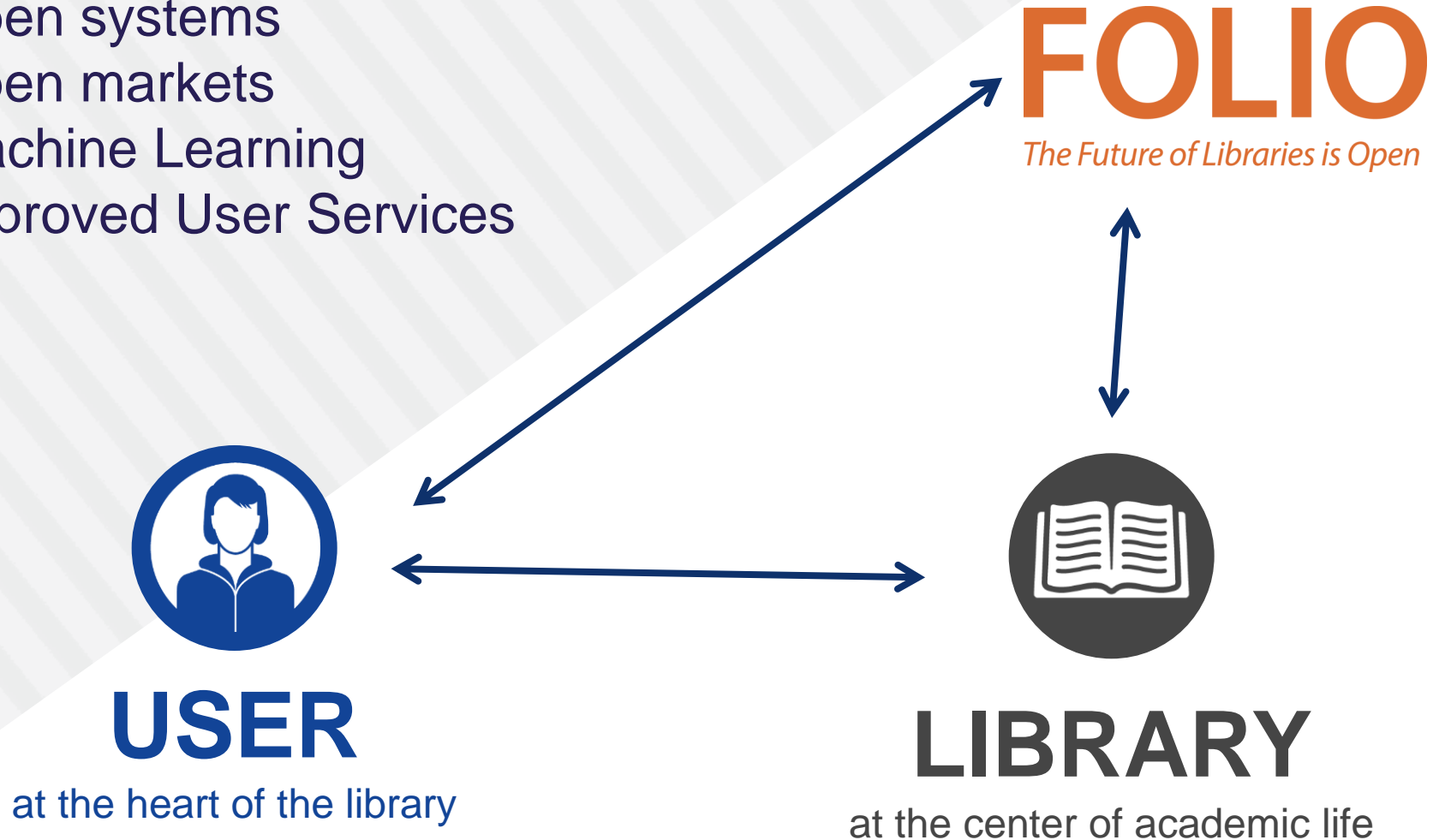


<https://developer.amazon.com/public/community/post>

The promise of 'platform' in the Library Services Platform has not yet been delivered.

Open Platforms Support:

- Improved Interoperability
- Open systems
- Open markets
- Machine Learning
- Improved User Services



The world has evolved.

How can the LSP adapt to
the new world of modern,
open platforms?



Open Source

Community

Modern

Modular

Supported

Introducing

FOLIO

a new open source Library Services Platform collaboration
supported by EBSCO

FOLIO GOALS

1

To **create a community** where libraries can come together to innovate

2

To **leverage open source** to reduce costs that libraries spend for library systems and support

3

To **improve products** by increasing library involvement in development

4

To bring **more choice** to libraries based on their particular needs

FOLIO

“future of libraries is open”

OPEN LIBRARY FOUNDATION

administrative home, community, funding



FOLIO

platform, product, marketplace



COMMUNITY

design, code sharing, workflows

FOLIO

is a dynamic global
community of libraries,
vendors, consortia and
individual contributors
building an open source
platform for rethinking ILS
workflows and services

FOLIO

“future of libraries is open”

OPEN LIBRARY FOUNDATION

governance, community, not-for-profit



FOLIO

platform, product, marketplace



COMMUNITY

design, code sharing, workflows

Open Library Foundation (OLF) is a not-for-profit organization providing infrastructure and governance to the FOLIO community.

1. GROW the community



FOLIO

“future of libraries is open”

OPEN LIBRARY FOUNDATION

governance, community, funding



FOLIO

platform, product, marketplace



COMMUNITY

design, code sharing, workflows

- FOLIO platform and base ILS apps are developed by Index Data (with EBSCO funding and FOLIO community guidance)
- New apps and extensions to existing apps are built by libraries, vendors and developers
- An open marketplace allows libraries to select apps to customize and extend the FOLIO system
- Multiple organizations provide implementation, support and hosting services, keeping costs low

FOLIO

“future of libraries is open”

OPEN LIBRARY FOUNDATION

governance, community, funding



FOLIO

platform, product, marketplace



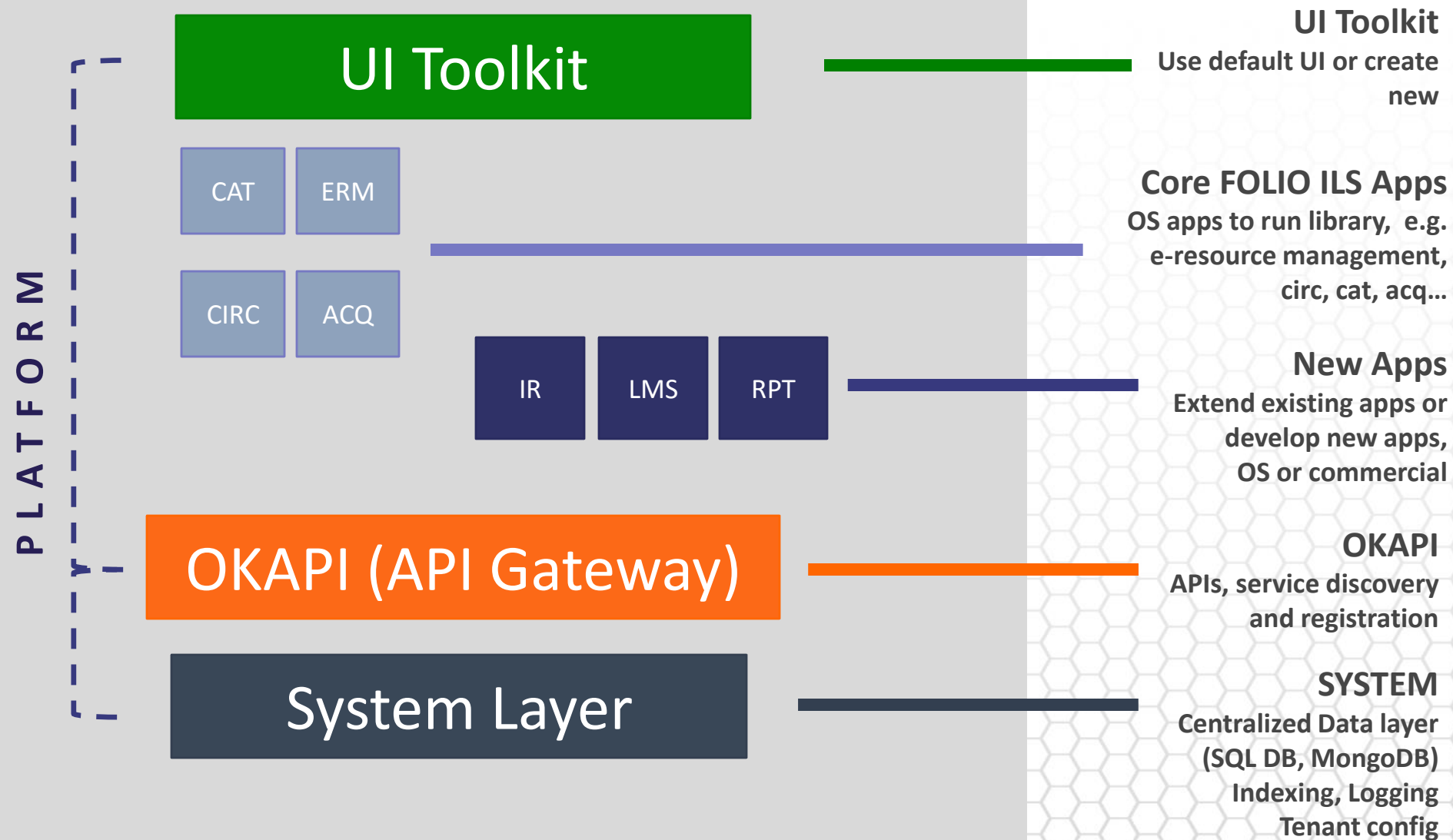
COMMUNITY

design, code sharing, workflows

- FOLIO platform is open source and based on microservice architecture
- FOLIO open platform designed to encourage interoperability and development of new applications
- New apps allow libraries to customize workflows
- Share resources and best practices with the community
- Transform library relationships with their software and suppliers

3. BUILD new solutions

FOLIO ARCHITECTURE



The Value of Partners



Partnership growth: > 60 partners

Access-It Software Ltd	INEK Inc.
Algorhythms (SLIM)	Innovative Interfaces (EDS)
Alist	Insight Informatics - Libero (Australia)
Archimed	IS Oxford Ltd (Heritage)
aStec	IZUM -Institute of Information Science
Aurora Information Technology Pty Ltd	L.A Information Technology Inc. (Smartlib FindPlus)
AutoGraphics	Lucidea, Inc (SydneyPlus, formerly InMagic)
Baratz / Absys	Max Elektronik SA
Biblimondo (Kuali France)	Mirtech Inc.
Bibliosoft	Monguz
Bookhouse Culture & Science Tech Corp	OCLC (EDS)
BSZ	Online Computer Library Center, Inc. (OCLC)
ByWater (US Koha)	Pergamum
Capita / Prism (old Talis ILS)	Primasoft Informatica Ltda (SophiA)
Civica Pt Limited	Prosentient Systems (Koha)
Concord Australia	PTFS-Europe (Koha)
Cosmotron Bohemia	SIABI
Data Management (SEBINA)	SirsiDynix
EOS (acquired by SirsiDynix)	Softlink International Ltd
eReserve	Soutron Limited
eScire (Koha)	SVOP Ltd.
Futurenuri Inc.	TIND Technologies AS
GBV Gemeinsamer Bibliotheksverbund	TLC The Library Corporation
GLYPH MOBILE	UNIBIS d.o.o
HBZ	WALDO (with PTFS LibLime)
Hyweb	Yordam



SirsiDynix®

“ SirsiDynix is thrilled about the FOLIO project. We will be providing hosting, service and support for FOLIO at approximately half the cost of Alma.”

Bill Davison, Chief Executive Officer
SirsiDynix



“ ByWater Solutions has a long history of being deeply involved with open source library software. We are 'all in' with FOLIO and looking forward to providing development, hosting and support.”

Nathan A. Curulla,
Co-Owner and Chief Revenue Officer
ByWater Solutions



“Radical Modularity”

App marketplace

Customized solutions by library

Microservices architecture

Modular Apps

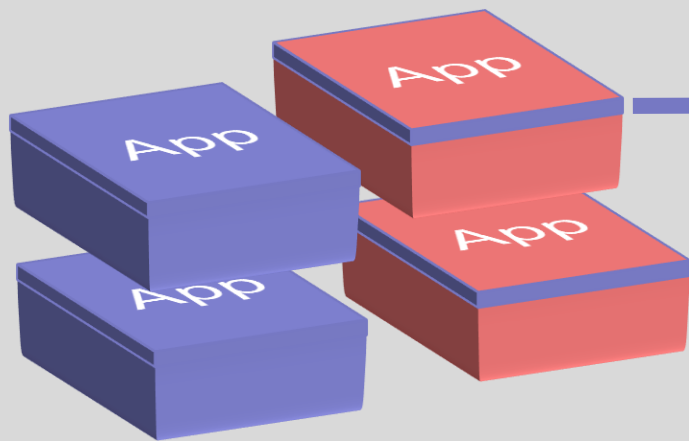
built on an open, extensible platform



Extensible platform
System/Tenant
E-Resource Mgmt
Acquisitions
Cataloguing
Circulation
Data Conversion Tools
Knowledge Base
Resource Sharing

Base FOLIO Solution

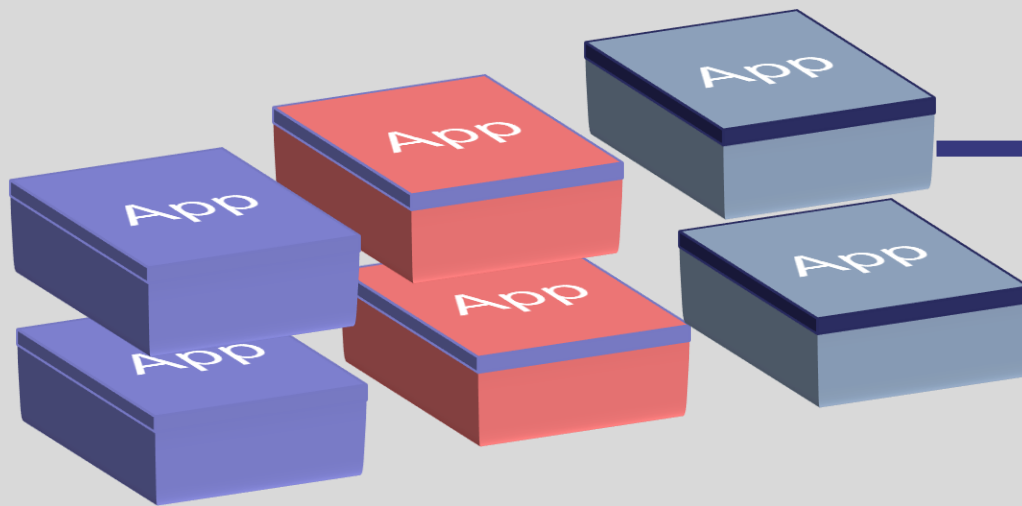
open source



Discovery
Open URL Linking
Holdings Management
Predictive analytics
ILL solutions
eBook integration
Collection Development

Expand the LSP

choose apps from an open marketplace



Linked Data Triplestore
Data Mining
Research Data
Institutional Repositories
Learning Management
ERP integration
Analytics and student
outcomes

Imagine new apps
beyond the ILS/LSP: the FOLIO difference



Project Management
Data Migration
Training
Hosting
Ongoing Support
Consulting
Integration Services
App Development

Service and Support

by EBSCO and others *or* host locally

FOLIO SIMPLICITY

- Supported. Open Source solution
- Turnkey. Out of the box implementation
- Ease of transition from current ILS
- Customize your LSP with certified apps from the marketplace

FOLIO Community Participation

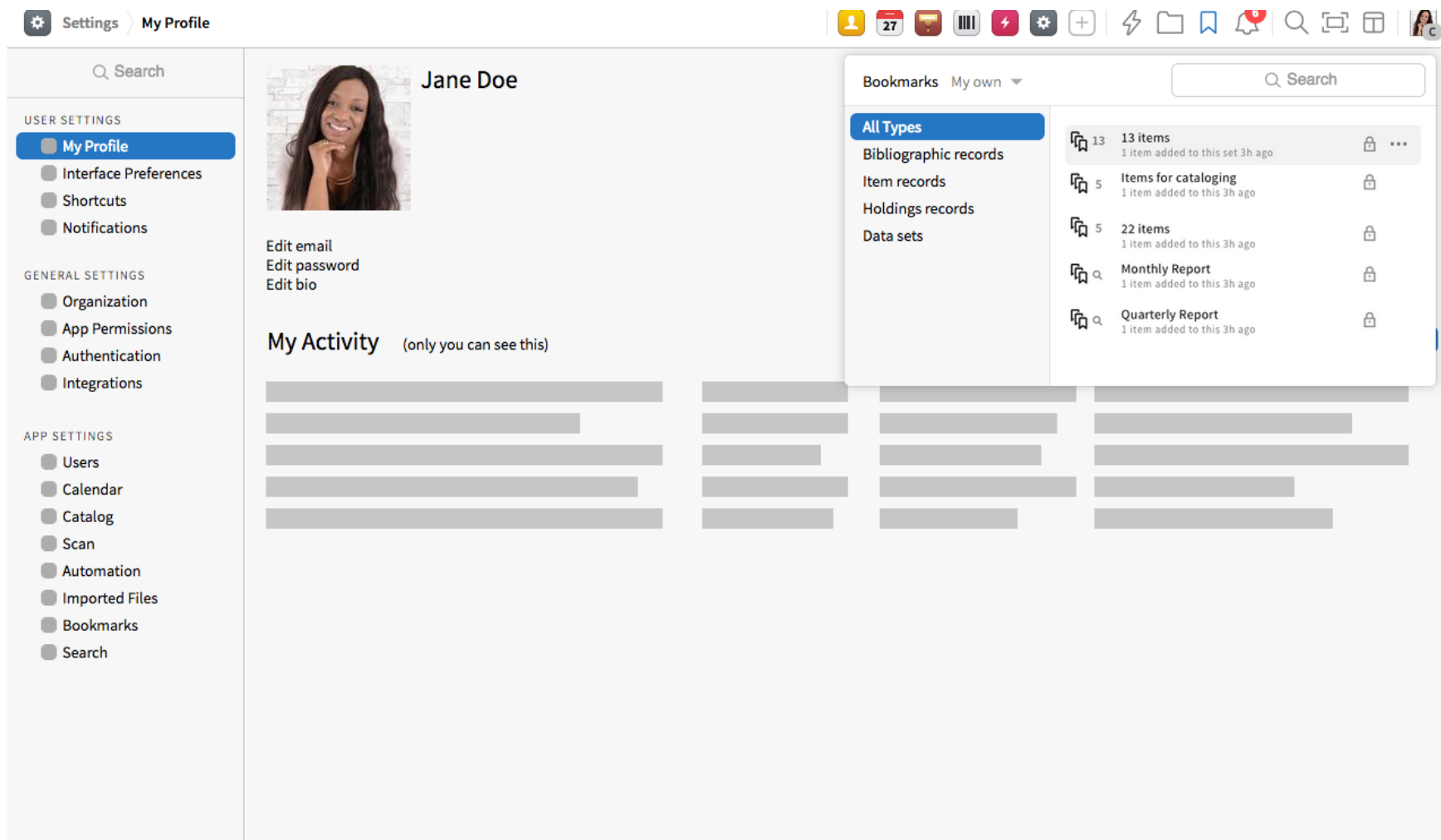
The screenshot shows the Confluence page for 'FOLIO Communication Spaces'. The page header includes the Confluence logo, navigation tabs (Spaces, People, Create), and a search bar. The main content area is titled 'FOLIO Communication Spaces' and includes a sub-header 'Primary Communication Tools'. Below this, there are icons for 'discuss.folio.org' and 'wiki.folio.org'. The 'discuss.folio.org' icon is highlighted with a red box and an arrow pointing to it. The 'wiki.folio.org' icon is also highlighted with a red box and an arrow pointing to it. The page is created by Peter Murray and last modified on Sep 09, 2016. The text below the icons states: 'The FOLIO Project has four primary communication channels and several secondary communication channels. Read about the philosophy of the FOLIO communication channels for more background.'

The screenshot shows the FOLIO Project Discussion site. The page header includes the FOLIO logo and the title 'FOLIO Project'. The main content area is titled 'Welcome to the FOLIO Project Discussion site. If you are looking to talk about the open source library welcome page to help you get acquainted with the site. If you are used to mailing lists, you might also want to read the Discussion Guidelines, Code of Conduct, Privacy, Terms of Service, Feedback, Dismiss this message, and the FOLIO work, connecting participants with community members.' Below this, there is a table with columns for 'Category', 'Topics', and 'Latest'. The table lists four categories: 'Community', 'Software', 'Special Interest Groups', and 'Local'. Each category has a description and a link to the discussion page. The 'Community' category has 2 topics, 'Software' has 6 topics, 'Special Interest Groups' has 0 topics, and 'Local' has 0 topics. The 'Special Interest Groups' category is further divided into 'Authentication/Authorization' (kabalog) and 'User Interface / User Experience'.

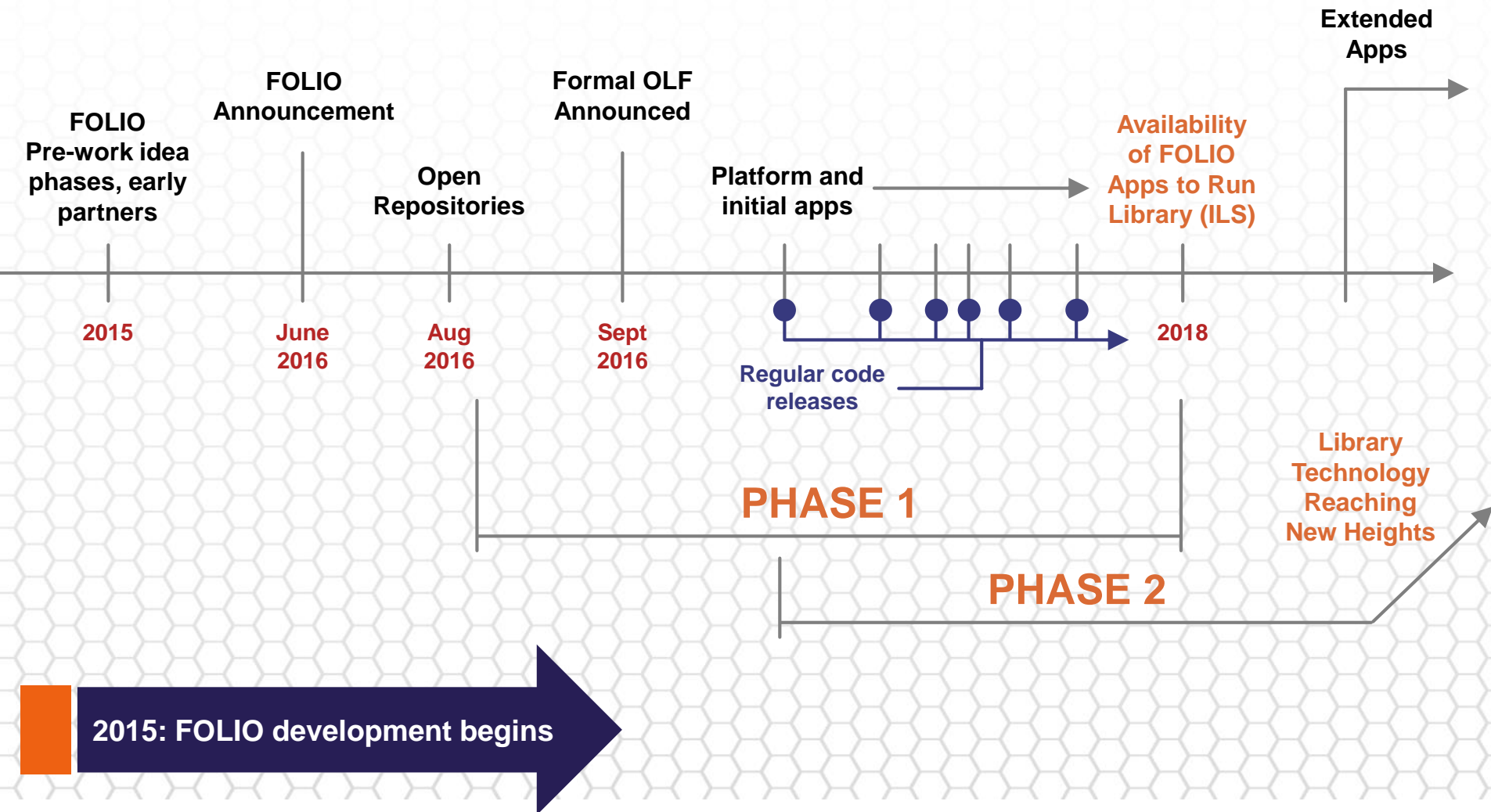
The screenshot shows the FOLIO Slack channel sidebar. The sidebar is titled 'FOLIO' and includes a search bar. Below the search bar, there is a list of channels. The channels are: #auth, #development, #general (highlighted), #kabalog, #linked-data, #opac, #random, #requirements, #resource-management, #support, and #ux. Below the channels list, there is a section for 'DIRECT MESSAGES (144)' which includes: slackbot, Andrew Nagy (you), Peter Murray, Sebastian Hammer, and Vince Bareau. The sidebar also includes a '+ Add Channel' button and a 'Search' icon.

The screenshot shows the FOLIO Slack #general channel. The channel header includes the title '#general', the number of members (143), and the date (September 16th). The channel content shows a list of messages from Mike Taylor, Kurt Nordstrom, and Jack Hill. Mike Taylor's messages are: 'To be fair, this is the classic "I support open sources, except when it would be inconvenient to do so" like 😊 I guess you are more ESR than RMS.' and 'Sure. That is why RMS's approach from the start has been that we need to build them 😊'. Kurt Nordstrom's messages are: 'I don't think that's entirely fair. There are some areas in which there just isn't a good open source tool to use. Especially when it comes to design.' and 'That's well and good, unless you have limited resources and deadlines. 😊'. Jack Hill's message is: 'not ideal, but I found <http://pencil.evolus.vn/> hey, I here we have this cool app development framework 😊'. The channel also includes a '+ Add Message' button and a 'Message #general' input field.

FOLIO: UI Prototyping



FOLIO TIMELINE



FOLIO ENGAGEMENT CHANNELS

- Slack channels for real-time chat
- Discuss forum for questions and discussions
- Wiki for documents and Special Interest Groups (SIGs)
- FOLIO.org website for project news and updates
- Developer website with access to documentation and links

FOLIO Community Channels

The screenshot shows the 'FOLIO Communication Spaces' page on the Confluence website. The page header includes the Confluence logo and navigation links like 'Spaces', 'People', and 'Create'. The main content area is titled 'FOLIO Communication Spaces' and mentions it was created by Peter Murray. Below the title, it states: 'The FOLIO Project has four primary communication channels and several secondary communication channels. Read about the philosophy of the FOLIO communication channels for more background.' A section titled 'Primary Communication Tools' features icons for 'discuss.folio.org' (with links to Categories, Topics, and Posts) and 'wiki.folio.org'.

This screenshot displays the 'FOLIO Project' discussion site. It features a welcome message and links to 'Discussion Guidelines', 'Code of Conduct', 'Privacy', 'Terms of Service', and 'Feedback'. Below this is a table with columns for 'Category', 'Topics', and 'Latest'. The categories listed are 'Community' (2 topics), 'Software' (6 topics), 'Special Interest Groups' (0 topics), and 'Local' (0 topics). Each category has a brief description and a list of sub-topics or links.

The screenshot shows the Slack sidebar for the 'FOLIO' workspace. It lists 'CHANNELS (14)' including #auth, #development, #general (highlighted), #kabalog, #linked-data, #opac, #random, #requirements, #resource-management, #support, and #ux. Below the channels is a 'DIRECT MESSAGES (144)' section listing conversations with slackbot, Andrew Nagy (you), Peter Murray, Sebastian Hammer, and Vince Bareau.

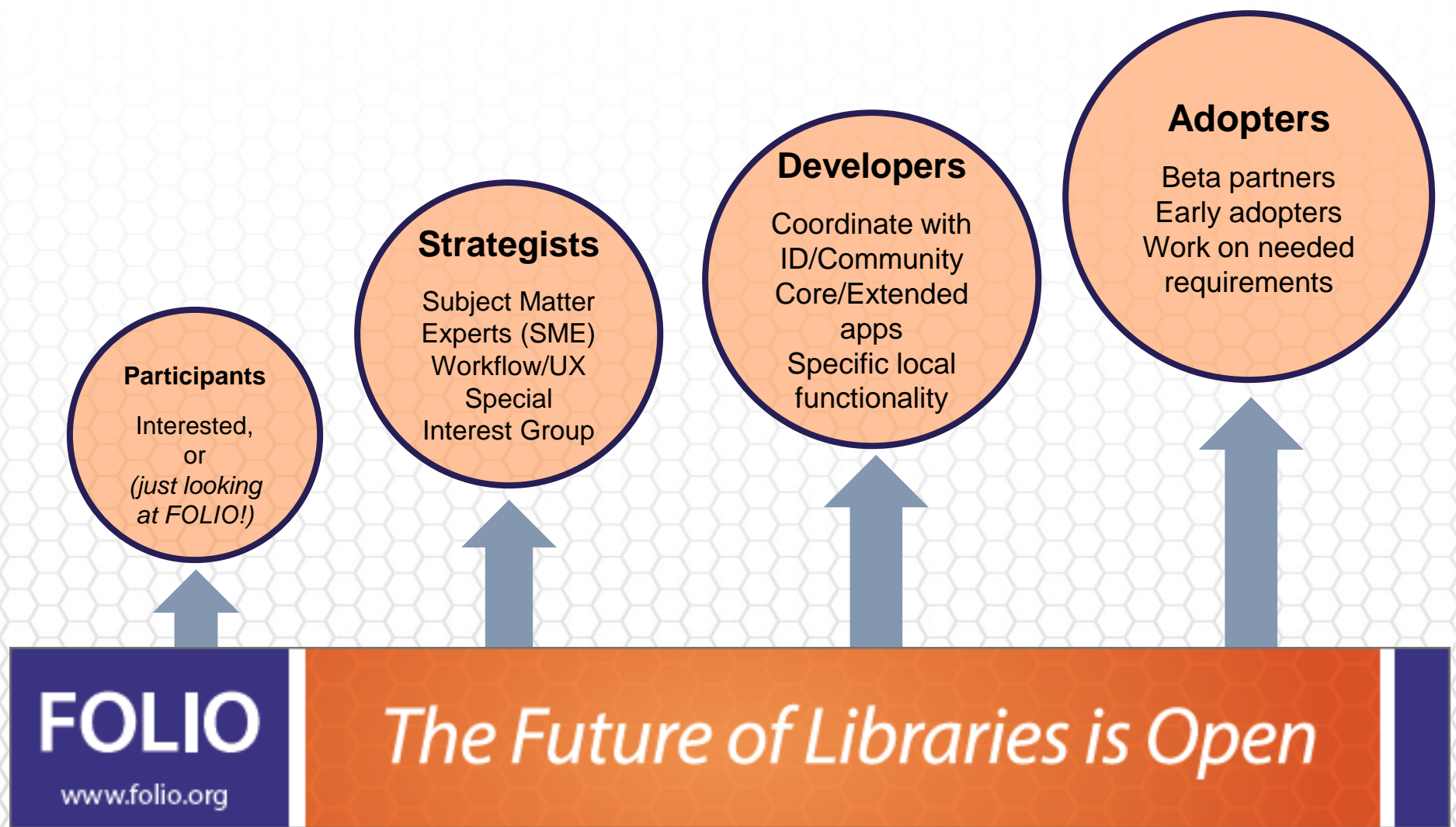
This screenshot shows a conversation in the '#general' Slack channel. The channel has 143 members and is described as a 'Company-wide announce...'. The date is September 16th. The conversation includes messages from Mike Taylor, Kurt Nordstrom, and Jack Hill, discussing open source philosophy and development frameworks. The messages are as follows:

- Mike Taylor** 10:47 AM: To be fair, this is the classic "I support open sources, except when it would be inconvenient to do so" like 😊 I guess you are more ESR than RMS.
- Kurt Nordstrom** 10:49 AM: I don't think that's entirely fair. There are some areas in which there just isn't a good open source tool to use. Especially when it comes to design.
- Mike Taylor** 10:57 AM: Sure. That is why RMS's approach from the start has been that we need to build them 😊
- Kurt Nordstrom** 11:01 AM: That's well and good, unless you have limited resources and deadlines. 🙄
- Jack Hill** 11:02 AM: not ideal, but I found <http://pencil.evolus.vn/> hey, I here we have this cool app development framework 😊
- Kurt Nordstrom** 11:03 AM: A more pragmatic focus, IMO, is assuring that your technology choices aren't limiting the application of the project...i.e., incorporating a proprietary component essential to the function of the project.
- Mike Taylor** 11:05 AM: Exactly: more ESR than RMS.
- Jason Skomorowski** 11:05 AM: Requiring a proprietary product as a barrier to contributing to an open source project is quite limiting; fortunately we haven't needed to go quite that far. And it sounds like Filip

FOLIO PARTICIPATION

- 1,500+ librarians have signed up to participate on FOLIO.org
- 250+ librarians have indicated interest in assisting with software development
- 800+ attendees at 4 recent community forums
 - Recent topic; Primer on FOLIO code
- 1,700 Slack messages last week!

HOW YOU CAN PARTICIPATE



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

the *future* of libraries is

OPEN

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

* Required Field

JOIN THE COMMUNITY

<https://www.folio.org>

Questions?

FOLIO

The Future of Libraries is Open

Neil Block
Vice President,
Global Open Source Innovation
EBSCO Information Services
nblock@ebSCO.com

Thank You!

FOLIO

The Future of Libraries is Open

Neil Block
Vice President,
Global Open Source Innovation
EBSCO Information Services
nblock@ebSCO.com

the *future* of libraries is

OPEN

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

* Required Field

JOIN THE COMMUNITY

<https://www.folio.org>