The (Actual) Next Generation of LMSs

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Library Revolutions


LP: Available for $75 on eBay, through yesterday.
Library Revolutions
Library Revolutions

- Card-based to electronic catalog
- Resources from print to electronic
- Library Management System (LMS) conversion to format-agnostic system
- Open source, freely accessible, marketplace-based universe
Electronic vs. Print

- Not sufficiently tracking e-resources
  - Only a few begin to approach this:
    - Alma
    - TIND
    - WorldShare Management Services

- FOLIO will provide an additional revolution
Automation Installs, Oberlin Group

Automation System Installations, by Type and Year, Oberlin Group Libraries (n=80)

Data Source: LibraryTechnology.org
Automation Installs, Oberlin Group

Automation System Installations, by Type and Year, Oberlin Group Libraries (n=80)

- Voyager (10)
- Symphony (2)
- Apache Solr (1)
- Horizon (1)
- Millenium (11)
- ALEPH 500 (3)

WorldShare (15)
Sierra (21)
Koha/ByWater (1)
Bibliovation (1)
Alma (13)
OPALS (1)

Data Source: LibraryTechnology.org

20 October 2017
Automation Installs, ARL Members

Automation System Installations, by Type and Year, ARL Libraries (n=125)

Data Source: LibraryTechnology.org
Automation Installs, PTPL Attendee Libraries

Automation System Installations, by Type and Year, PTPL Attendee Institutions (n=26)

Data Source: LibraryTechnology.org
FOLIO as Revolutionary LMS: Background

• What is FOLIO?
  – An open-source LMS, available to anyone

• Who is selling it?
  – No one, and anyone

• Who is building it?
  – Open Library Foundation, with heavy EBSCO involvement
FOLIO: What It Is

• Open-source - download the code, run it yourself
• A resource management solution, regardless of format
• A marketplace - more in a bit
• Designed by librarians
FOLIO: What It Isn’t

- Available today
- A front-end
- A product from EBSCO
FOLIO: Structure

• Product Council oversees SIGs
• Designers, developers, paid by OLF
  – Financial support from EBSCO to OLF
  – Grant funding to OLF (Mellon, member libraries)
  – Some projects supported specifically by EBSCO
• Very international body of librarians
  – Various sites, presentations being translated to Chinese, Japanese, etc.
FOLIO SIGs

Product Council

User Management
Consortia (No CUL)
Reporting
Privacy
Systems Operations and Management

Metadata Management
Resource Management
Resource Access

Accessibility
Internationalization
• Librarian-led and -advised Special Interest Groups (SIGs)
• Completely open development
  – discuss.folio.org  – ux.folio.org
  – www.folio.org
• Open FOLIO slack channels
• Approx 14 yrs’ worth of meetings recorded; available to anyone
Cornell Overview

• University: 22,000 students; 2900 faculty
• Library: 380 staff; ARL member; 17 libraries, including storage annex
  – Print resources: ~8M volumes held, ~70,000 volumes added each year, ~35,000 serial issues received per year
  – Electronic resources: >1.5M ebook-like entities, 125,000 ejournals
Paraphrased: “As core as Voyager is to our daily functions, it is frightening just how much we cobble together.”
FOLIO At Cornell

• Dean Krafft, chair of OLF Board of Directors
• Jesse Koennecke & Chris Manly on Product Council
• At least one librarian on nearly every SIG; some chaired by Cornell librarians
• Twice-monthly meetings of all Cornell participants on campus
• Multiple developers, admins on Cornell payroll
## Pros & Cons of Open Development

<table>
<thead>
<tr>
<th>FOLIO’s Approach</th>
<th>Internal Development Teams</th>
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<td>Many dozens (hundreds?) of vocal stakeholders</td>
<td>Often easier to decide and act</td>
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<td>Better input and feedback - though there can be a lot of it!</td>
<td>Funding is based on a bottom line &amp; ROI</td>
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<td>Development conflicts</td>
<td>A more-focused group making decisions</td>
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<tr>
<td>Anyone can participate</td>
<td>Sometimes a loss of focus on end goals</td>
</tr>
<tr>
<td>Skills and insights of hundreds</td>
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FOLIO In Action

FOLIO Demo Site

FOLIO Prototypes

FOLIO Welcome
• Great, great opportunities here
• A platform on which to innovate
• Offer or sell workflows, solutions, support, hosting space, knowledgebase, link resolvers, bindery module, etc., etc.
• Possibly unique opportunity to open and expand library management services
If FOLIO succeeds, it could introduce a whole new way of managing library services.

Fantastic group of organizations and institutions.

Community, community, community.
• Community is critical
  – A strong community will get over any stumbling blocks; it’ll help us communicate with aliens

• The innovation platform of the marketplace
Cornell Principles

- Open Source
- No Non-disclosures
- Welcome innovation
- Best in class
- Create tools to meet our needs
OLE-FOLIO Implementation Project

Created by Confluence Administrator IV, last modified by Holly L. Mistelbauer on Oct 07, 2017

Team Members

Contact Team
- Dean Krafft
- Sharon Beltaine (Reporting)
- Adam Chandler (Privacy)
- Matt Connolly (Developer)
- Ann Crowley (Finance)
- Jesse Koennecke (Technical Services)
- Zsuzsa Kolay (Marketing)
- Deb Lamb (Public Services)
- Alan McCarty (DevOps)
- Peter McCracken (Technical Services)
- Chris Manly (Information Technology)
- Holly Mistelbauer (Project Leader)
- Kizer Walker (Collection Development)
- Melissa Wallace (Accessibility)
- Frances Webb (Developer)

Extended Team Member List

Sub-Sections

- Groups
  - FOLIO Groups
  - OLE Groups
- Meeting Notes - CUL Team
  - 2017-01-13
  - 2017-01-30
  - 2017-02-13
  - 2017-02-27
  - 2017-03-13
  - 2017-03-27
  - 2017-04-10
  - 2017-05-08
  - 2017-05-22
  - 2017-06-19
  - 2017-07-31
  - 2017-08-14
  - 2017-09-11
  - 2017-10-09
  - 2017-10-23
- Other Sub-Sections
  - Agile Approach to Development
Overview

• Library Revolutions
• Existing LMSs
• FOLIO Overview
• Cornell Overview
• FOLIO at Cornell
• Product development differences

• FOLIO in Action
• FOLIO Marketplace
• FOLIO & LMS Future
• Conclusions