



FOLIO Update

Prospector CatRef Meeting 10/22/21



Agenda

- Overview of CU Boulder and FOLIO
- FOLIO Project Status Update
- CU Boulder Transition Plans



FOLIO

FOLIO is both a community and a product.

“FOLIO, an open source project, aims to reimagine library software through a unique collaboration of libraries, developers and vendors. It moves beyond the traditional library management system to a new paradigm, where apps are built on an open platform, providing libraries more choice and delivering new services to users.

The FOLIO platform includes core functionality found in current library management systems and is extensible, allowing libraries to meet ever changing needs.”*

Capabilities include check in/out, e-resource management, agreement management, financial management, inventory management, user management, data import/export, to name a few.

*Source: <https://www.folio.org/>



Platform Advantages

FOLIO is an open source tool being developed by an innovative collaboration of libraries, developers, and vendors.

The modular design and extensibility of the platform will allow libraries to choose components and workflows that they desire and not be forced to work with a bundled set of services.

FOLIO is being built with an eye for moving beyond MARC. A FOLIO integration with Sinopia (an open-source linked data editor being developed by the LD4P) is under consideration.

The product will also support multiple knowledge bases and a full collection view.



FOLIO Project Update: Participating Libraries

Duke University

Five Colleges

Cornell University

LeHigh University

National Library of Florence

Stanford University

Missouri State University

Leipzig U

Universidad de Concepción (first in South America)

University of Chicago

Fenway Library Organization

Texas A&M University

Michigan State University

Grand Valley State University

Shanghai Public

Spokane Public

ZBW Keil/Hamburg

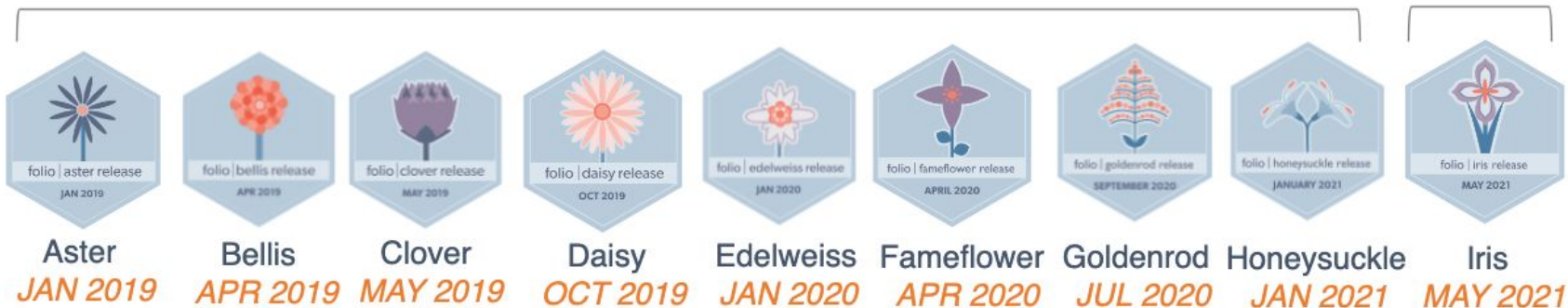
Durban University (first in Africa)

University of Alabama

FOLIO Software Release Milestones

releases to date

upcoming
release



community software releases happen regularly

~

70 features added per release

3 named releases per year



The Libraries Joined Open Library Environment (OLE) 2017

Engagement with OLE and FOLIO honors the expectations for preferencing content and supporting technologies that are open, interoperable, universally designed, and prioritize user privacy that are expressed in the Libraries' strategic plan. Key considerations/advantages of the OLE partnership:

- Improved ILS marketplace, open business model
- Cost/limitations of commercially available tools
- Microservices architecture, adaptability
- Moving beyond MARC
- Create solutions instead of workarounds
- Opportunity to learn about FOLIO and to examine our needs



FOLIO Governance

Has moved to a new model that allows organizations to be recognized as members whether they commit to paying dues or donating the time of people to do the work needed to create and sustain FOLIO.

The FOLIO Community Council was formed in March 2021. It has the following charter:

To foster a healthy, productive community ecosystem, policy, and collaboration for the FOLIO project.

It plays 2 key roles. Firstly to ensure the community is strong and healthy, which can include recruiting, marketing and many external facing activities. Secondly, this council is responsible for the smooth operation of community activities, including coordinating with other councils, and ensuring the community is collaborative and inclusive. It is the highest level organizational body within FOLIO project.

CUB now a Partner Library in the FOLIO Community. For more information on FOLIO see folio.org and wiki.folio.org



CU Guild and Pods

The FOLIO Guild at the University of Colorado was formed in September 2020. The Guild charge was focused on determining the feasibility of adopting FOLIO and, if so, when. The Guild is now coordinating implementation activities.

The following pods have been formed to develop functional expertise and assist with testing, evaluation, and training: Resource Access, Resource Management, Metadata Management, Systems Operations and Management, Discovery, Reporting, and Resource Sharing.

Guild and Pod membership is drawn from all CU System libraries.

FOLIO Priorities and Planning Council (CUB and Law)



Sandbox and more

To support the work of the pods, a FOLIO “sandbox”* was established to enable assessment of features for comparison purposes and as a means to start the process of re-imagining service delivery.

This temporary environment is being made available to guild and pod members to support a detailed review of features, to understand the data, and to develop workflows specific to their areas of concern.

To support the documentation/communication needs of the guild and pods we’re using Confluence, a shared Google Drive, Teams, and GitHub.

Local presentations (STAT Meetings), FOLIO Updates in Shelf Life,

<https://www.colorado.edu/libraries/2021/09/24/cu-boulder-partners-index-data-data-migration-folio>



Data Migration and Discovery

CU Boulder is working with Index Data on migrating data from Sierra to our FOLIO environment.

Weekly meeting

Currently focusing on mapping bibs/items/holdings information, user groups, locations, and item status. Will move on to Acquisitions/ERM in November.

The FOLIO Discovery Pod has recommended replacing both Summon (OneSearch) and the Sierra Webpac (Chinook) with EBSCO Discovery Service. This choice best reflects our High Level Principles by providing a single, modern interface for librarian-curated electronic and print resources that can support changing user needs over time.



Timeline

Fall 21

- Data Migration: First extraction and loads of Bibs/Holdings/Items/Users.
- Iris Sandbox, Circ Policies, Record loading, Reporting assessment

Winter/Spring
21/22

- Data Migration dry runs (focus on acquisitions, agreements, circulation)
- Assess Lotus release, set up ERM and Discovery. Documentation and training

Summer 22

- Data migration dry runs, go-live on Kiwi or Lotus
- Documentation and training, Communications