

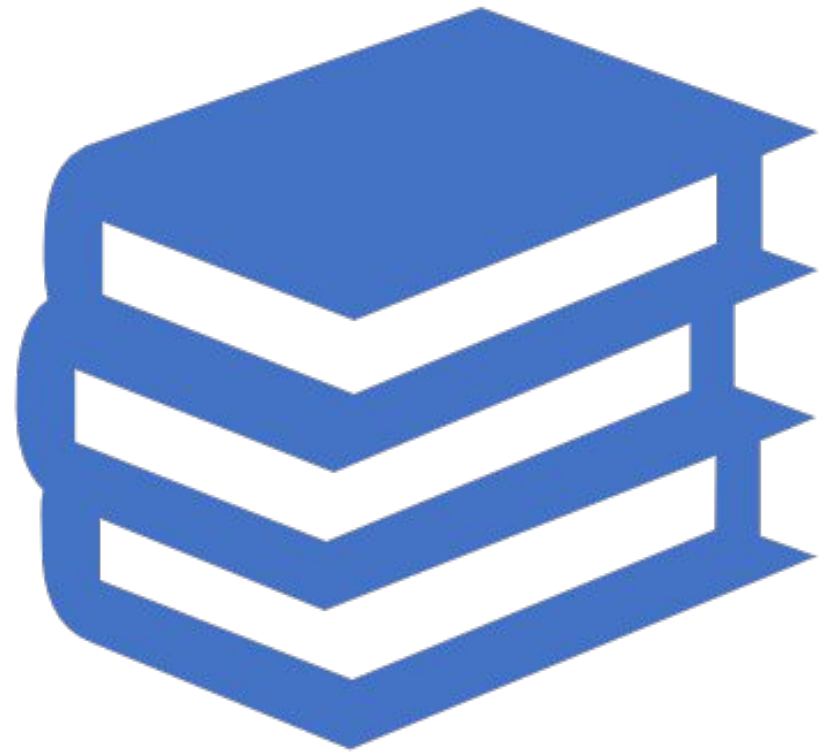
An Overview on FOLIO: A Library Services platform

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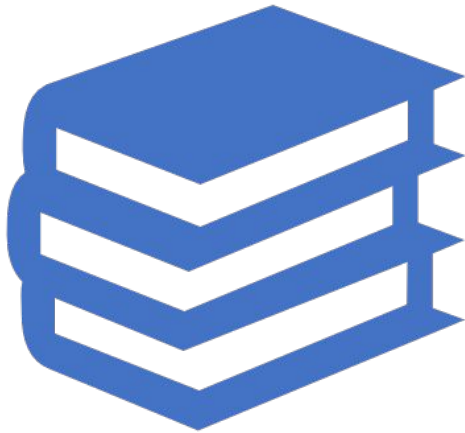
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Introduction



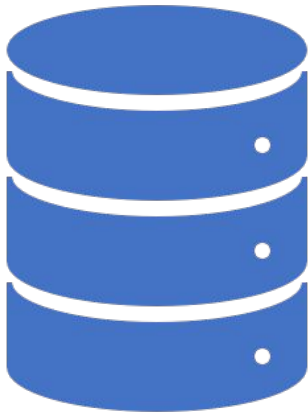
- Many libraries are in the process of rethinking the effectiveness of the library automation tools they are using to provide library services, both within and outside their library buildings. Internally, the core component driving many of the library services has been the ILS. The next generation of these systems are called “library services platform,” a term coined by Marshall Breeding.

What is an Integrated Library System(ILS)

- An **integrated library system (ILS)**, also known as a **library management system (LMS)**, is an enterprise resource_planning (ERP) system for a library, used to track items owned, orders made, bills paid, and patrons who have borrowed.

What is an Integrated Library System(ILS)

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- An ILS usually comprises a relational_database, software to interact with that database, and two graphical user interfaces (one for patrons, one for staff). Most ILSes separate software functions into discrete programs called modules, each of them integrated with a unified interface.

What is an Integrated Library System(ILS)

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- Examples of modules might include:
 - acquisitions (ordering, receiving, and invoicing materials)
 - cataloguing (classifying and indexing materials)
 - circulation (lending materials to patrons and receiving them back)
 - serials (tracking magazine, journals, and newspaper holdings)
 - online public access catalogue or OPAC (public user interface)

What is a Library Services Platform (LSP)

- The term library services platform describes a type of library resource management system with a set of characteristics that differ substantially from the long-standing genre of integrated library system.

Why Library Services Platform (LSP)

- The integrated library system was well established as the core automation system. As libraries began to acquire electronic resources, new tools were needed for each aspect of the management of and access to those materials.

Why Library Services Platform (LSP)

- Integrated library systems, although comprehensive for the acquisition, management, and access to primarily print materials, saw their role in the overall technology environment of a library diminished for those libraries that shifted their collections acquisitions to primarily electronic and digital resources.

Why Library Services Platform (LSP) ...

- OpenURL link resolvers emerged in the early 2000s to assist libraries in providing a manageable approach to linking from citations to the full text or other services to make articles available to library users. These products were able to provide context-sensitive linking to the full text on the server of the publisher to which the library subscribes.

Why Library Services Platform (LSP)...

- Knowledge bases of electronic resources provide a database that describes the content packages to which libraries subscribe.
- A–Z listings and other finding aids are often associated with link resolvers and make use of the e-resource knowledge base.

Why Library Services Platform (LSP)...

- Electronic resource management systems provide specialized capabilities for acquisition, description, and other operational tasks associated with aggregated content products, e-journals, and other packages of electronic content.
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Why Library Services Platform (LSP)...


- Electronic resource management systems provide functionality not traditionally included in an integrated library system, such as:
 - coding and tracking of license terms,
 - collection of usage statistics, header and footer
 - Electronic resource management systems include financial management components to manage expenditures relative to established library budgets.
 - They have to handle multiple procurement models, including standard annual subscriptions, open-access selections, purchase of backfile collections, and other scenarios.

What is a Library Services Platform (LSP)

- Digital preservation platforms provide additional layers of functionality to a digital asset management environment to ensure the long-term viability of digital materials.

Functional Characteristics of LSP

- Management of Electronic and Print Formats of Materials
- Replacement of Multiple Incumbent Products
- Extensive Metadata Management
- Multiple Procurement Workflows
- Knowledge Bases
- Built-in Collection Analytics
- Conceptual Organization
- Discovery



The primary difference between the traditional ILS and the new LSP is that the ILS products were largely designed around the management of print collections. As libraries have moved increasingly to digital collections, ILS have failed to smoothly and efficiently the integrations of all the workflows that are different for print and digital collections.



Older ILS do not take advantage of latest offerings in computing technologies and architectures.

What is FOLIO?

Future of Libraries is Open

- FOLIO is a partnership between libraries and vendors that is developing an open source library services platform (LSP).
- FOLIO's platform is built on the idea that library management software should be flexible, modular, extensible, modern, and affordable, and it's gathered a number of partners and contributors to help make that vision a reality.

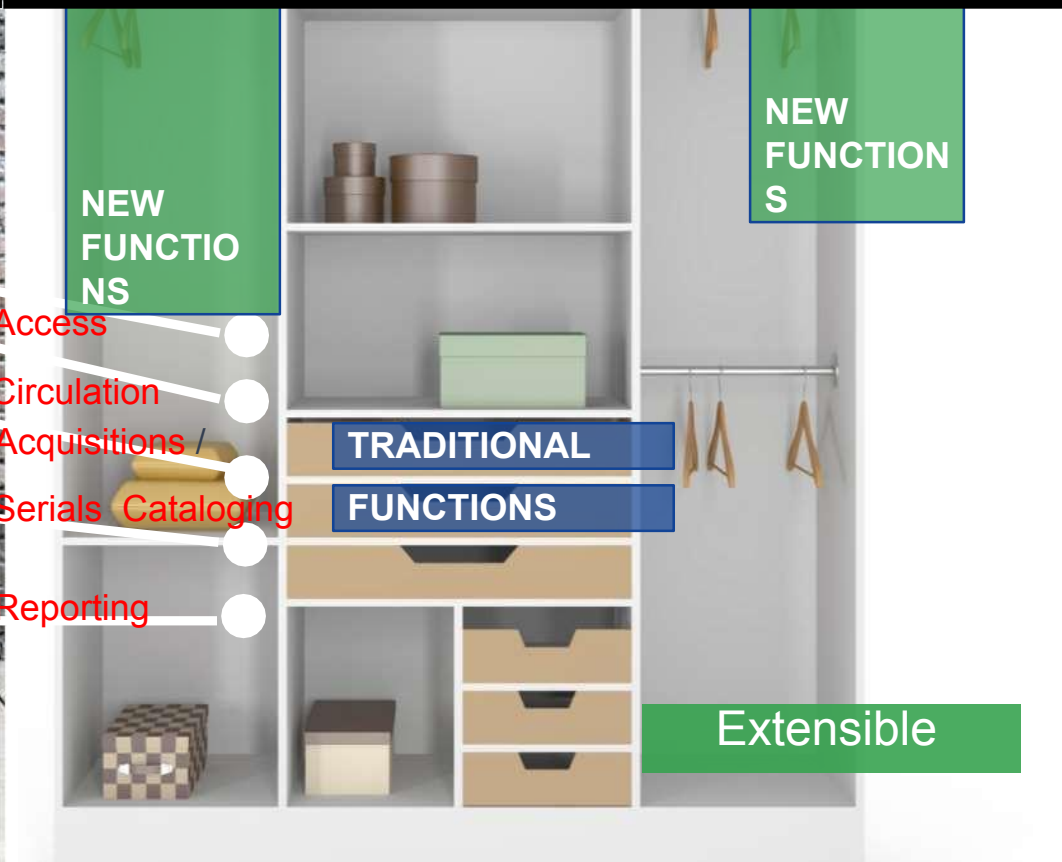
What is FOLIO?

Future of Libraries is Open

- FOLIO Partners include:
 - Open Library Environment - A part of Open Library Foundation
 - Library and research services providers – Vendors
 - Library software and services providers including - Index Data
 - Library IT solutions and support provider ByWater Solutions.

Old Fashioned: All in one system

New Fashioned: Disparate but integrated



How Folio is changing the traditional system

- Multi-tenant, cloud-ready, built around an open knowledge base, linked data, electronic and print resource management
- Open Innovation Business Model – No lock-in, no full migration, free availability of codes, multiple vendors
- Micro-service Architecture – Customizable, Pick and choose which FOLIO apps to use
- Apache license: Everyone can play around
- More collaboration and interactions with experts
- Modular – snap-in modules (apps) can be contributed by libraries or vendor



Vendors and products of LSP include:

- WorldShare Management Solutions by OCLC
- Alma by Ex Libris
- Sierra by Innovative Interfaces
- Intota by ProQuest
- FOLIO

References

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Thank you for
listening!