

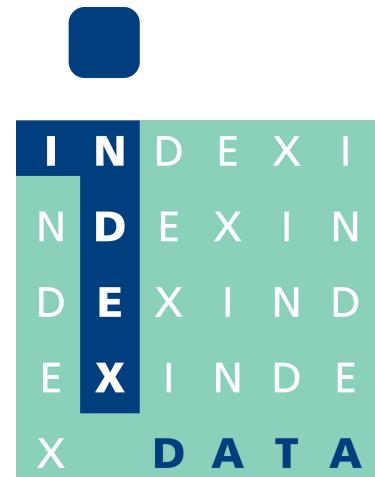
What is FOLIO?

Three answers

Mike Taylor mike@indexdata.com

Tara Barnett tara@indexdata.com

Peter Murray peter@indexdata.com



the Future Of Libraries Is Open

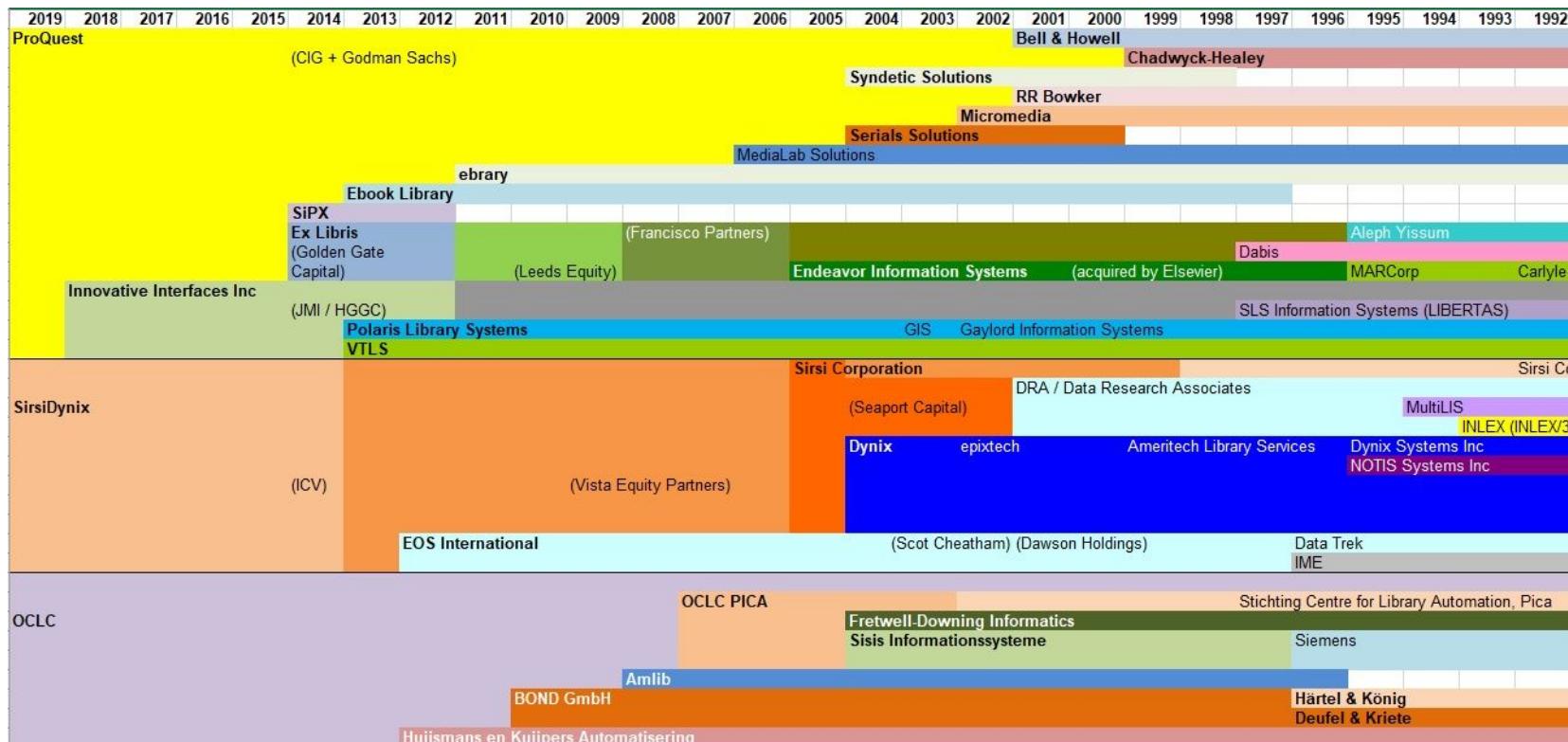
How exactly does FOLIO help to create an open future?

- FOLIO is an open LMS
- FOLIO is an open community
- FOLIO is an open platform

FOLIO is an open LMS

Diagram by
Marshall Breeding

FOLIO is an open LMS



FOLIO is an open LMS

- FOLIO provides much-needed competition
- Open source
- Owned by the non-profit Open Library Foundation
- The FOLIO LMS can never be acquired
- It will always present a real alternative.

FOLIO is an open community

Any interested party can contribute:

- Library
- Developer
- Service provider
- Interested individual

FOLIO is an open platform

- The LMS is a set of modules
- Modules run in a supportive environment
- The platform has its own independent existence

Over to Tara ...

The FOLIO LMS

FOLIO is...

An LMS? An ILS? An LSP?

ILS: Integrated Library System

LMS: Library Management System

LSP: Library Services Platform

The Apps

Circulation

Check in

Check out

Circulation Log

Requests

Courses

Acquisitions

Finance

Invoices

Orders

Organizations

Receiving

Metadata Management

Data Export

Data Import

Inventory

MARCauthority

Electronic Resource Management

Agreements

eHoldings

eUsage

Licenses

Local KB admin

General
Users
Settings
LDP

And more!

The Journey of a Book

 **Inventory** ▾

Agreements Bulk edit Check in Check out Apps Online

Search & filter

Instance Holdings Item

Keyword (title, contributor, identifier)

Search

Reset all

Effective location (item)
Language
Resource Type
Format
Mode of issuance
Nature of content
Staff suppress
Suppress from discovery
Statistical code
Date created
Date updated
Instance status
Source
Tags

Single record import

Enter OCLC WorldCat identifier

098285986

Cancel Import

Choose a filter or enter a search query to show results.

Single Record Import

Inventory ▾

Agreements Bulk edit Check in Check out Circulation log Apps Online

Search & filter <

Instance Holdings Item

Keyword (title, contributor, identifier)

Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

Reset all

Effective location (item)

Language

Resource Type

Format

Mode of issuance

Nature of content

Staff suppress

Suppress from discovery

Statistical code

Date created

Date updated

Instance status

Source

Tags

Inventory 1 record found Actions

Instance • Witch hat atelier / Kamome Shirahama ; translati... in00000000011 · Last updated: 8/31/2022 Actions

Title ^ Contributors

Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

Instance record (text)

Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

Add holdings

Administrative data

Record last updated: 8/31/2022 6:17 AM

Instance HRID	Source	Cataloged date
in00000000011	MARC	-

Instance status term	Instance status code	Instance status source
-	-	-

status updated
8/31/2022, 6:17 AM

Mode of issuance

single unit

Statistical code type	Statistical code
-	-

Administrative note

Inventory

Data import

Agreements Bulk edit Check in Check out Circulation log Apps Online

Search & filter

Logs 1 log found Actions

File name	Status	Records	Job profile	Ended running
No file name	Completed	1	Inventory Single Record - Default Create Instance	8/31/2022, 6:17 AM

< Previous 1 - 1 Next >

Reset all

Errors in import

No Yes

Date Job profile User Inventory single record imports

This screenshot shows the 'Data import' section of a library management system. The left sidebar contains search filters for 'File name', 'Status' (Completed), 'Records' (1), 'Job profile' (Inventory Single Record - Default Create Instance), and a timestamp (8/31/2022, 6:17 AM). Below these filters are dropdown menus for 'Errors in import' (No, Yes), 'Date', 'Job profile', 'User', and 'Inventory single record imports'. The main area displays a table with one row of data. The table has columns for 'File name' (No file name), 'Status' (Completed), 'Records' (1), 'Job profile' (Inventory Single Record - Default Create Instance), and 'Ended running' (8/31/2022, 6:17 AM). Navigation links at the bottom include '< Previous', '1 - 1', and 'Next >'.

Data Import

Orders ▾ **Agreements** **Bulk edit** **Check in** **Check out** **Circulation log** **Courses** **Apps** ▾ **?** **Online** ▾

Create purchase order

Template name [Collapse all](#)
Amazon book orders (Amazon-B) ▾

Purchase order

Prefix	PO number	Suffix
<input type="text"/>	10000	<input type="text"/>

Vendor* **Order type*** **Acquisition units** **Assigned to**
Amazon.com One-time

Organization look-up

Bill to	Address	Ship to	Address
<input type="text"/>	-	<input type="text"/>	-

Manual **Re-encumber**
Created by - **Created on** -

Tags

Check credit card statement to make sure payment shows up.

Cancel **Save & close**

Orders

Orders ▾ **Agreements** **Bulk edit** **Check in** **Check out** **Circulation log** **Courses** **Apps** ▾ **?** **Online** ▾

X Add PO line [Collapse all](#)

Template name
Amazon book orders (Amazon-B) ▾

Item details

Package

Title* Connected 
Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.
[Title look-up](#)

Receiving note **Must acknowledge receiving note**

Subscription from **Subscription to** **Subscription interval**
MM/DD/YYYY  MM/DD/YYYY  0

Publication date **Publisher** **Edition** **Linked package**
[2019-] Kodansha Comics [Lookup package POL](#)

Contributors

Cancel **Save & close**

Orders: Order Lines

Orders ▾ Agreements Bulk edit Check in Check out Circulation log Courses Apps ▾ ? Online

Search & filter ▶

Orders **Order lines**

Keyword

Search

Reset all

Status **Closed** **Open** **Pending**

Prefix
Suffix
Approved
Acquisition unit
Assigned to
Created by
Date created
Date opened
Order type
Vendor

Orders 0 records found

Actions ▾

No results found. Please check your filters.

Purchase order - 10000

Actions ▾ 1

Edit **Open** **Duplicate** **Delete** **Print order**

Purchase order

Record last updated: 8/31/2022 6:18 AM

PO number	Vendor	Order type	Acquisition
10000	Amazon.com	One-Time	units

Approval date **Assigned to** **Bill to** **Ship to**

- - - -

Manual **Re-encumber** **Created by** **Created on**

ADMINISTRATOR, DIKU 8/31/2022, 6:18 AM

Note
Check credit card statement to make sure payment shows up

PO summary

Total units	Approved	Workflow
1	<input checked="" type="checkbox"/>	status Pending

Total estimated price £20.00 **Total expended** \$0.00

Orders

Inventory

Agreements Bulk edit Check in Check out Circulation log Apps Online

Search & filter

Instance Holdings Item

Keyword (title, contributor, identifier) ▾
witch hat

Search

Reset all

Effective location (item)

Language

Resource Type

Format

Mode of issuance

Nature of content

Staff suppress

Suppress from discovery

Statistical code

Date created

Date updated

Instance status

Source

Tags

Inventory 1 record found Actions

Title ^	Contributors
Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.	Shirahama, Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

Instance • Witch hat atelier / Kamome Shirahama ; translati... in00000000011 · Last updated: 8/31/2022 Actions 0 Collapse all

Instance record (text)

Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

Holdings: Main Library > View holdings Add item

Item: barcode ^	Status	Copy number	Loan type	Effective
No barcode	On order	-	Can circulate	Main Lib

< Previous 1 - 1 Next >

Add holdings

Administrative data

Record last updated: 8/31/2022 6:18 AM

Instance HRID	Source	Cataloged date
in00000000011	MARC	-

Instance status term	Instance status code	Instance status source
status updated	-	-

8/31/2022, 6:17 AM

Inventory

Inventory ▾ Agreements Bulk edit Check in Check out Circulation log Apps ▾ Online ▾

Item • On order
it0000000001 · Last updated: 8/31/2022

Instance: Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee... Kodansha Comics, [2019-]
Holdings: Main Library >

Actions ▾

- Edit**
- Duplicate**
- Delete**
- + New Request**

Item record (book, On order)

Effective location for item Main Library **Effective call number** string

[Expand all](#)

Administrative data

Record last updated: 8/31/2022 6:20 AM

Item HRID it0000000001	Item barcode -	Accession number -
Item identifier -	Former identifier -	
Statistical code type -	Statistical code -	
Administrative note -		

<https://folio-snapshot.dev.folio.org/requests?itemId=9530d4dd-84b6-4d75-afa1-e8c7cccb8e5d&query=9530d4dd-84b6-4d75-afa1-e8c7cccb8e5d&layer=create>

Placing a Request

Online

X

New request

Item status

On order

Current due date

-

Requests on item

0

^ Request information

Request type

Hold

Request expiration date

YYYY-MM-DD

Patron comments

^ Requester information

Requester barcode*

123

Enter

Requester look-up

Requester

rick, psych Barcode: 123

Requester patron group

staff

Fulfillment preference

Hold Shelf

Pickup service point*

Circ Desk 1

Cancel

Save & close

Requests

- Agreements
- Bulk edit
- Check in
- Check out
- Circulation log
- Apps
- Online

Search & filter

Enter search criteria to start search

Actions

X Request Detail Actions

^ Title information

Title level requests	Title	Contributor
0	Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.	Shirahama, Kamome,; Kohler, Stephen,; Blakeslee, Lys, 1985-

Publication date Edition ISBN(s)

- - (OCoLC)on1098285986,
9781632367709 (v. 1 ;
paperback), 163236770X
(v. 1 ; paperback),
9781632368041 (v. 2 ;
paperback)

^ Item information

Item id	Title	Contributor
9530d4dd-84b6-4d75- afal-e8c7cccb8e5d	Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.	Shirahama, Kamome,

Effective location Effective call number string

Main Library -

Item status Current due date Requests on item

Choose a filter or enter a search query to show results.

Requests

X

Create vendor invoice

[Collapse all](#)

^ Invoice information

Invoice date*

08/31/2022

Status*

Open

Payment due

MM/DD/YYYY

Terms

Approval date

Approved by

Acquisition units

Bill to

Address

Batch group*

Sub-total

Total adjustments

Calculated total amount

Lock total

Lock total amount△

Note



^ Adjustments

Preset adjustment

[Cancel](#)[Save & close](#)

Invoices

X

Select order lines

 All Reset all Status Vendor n Date crea Invoice d Acquisiti Tags Payment Payment Approval Source Export to Payment Batch gro Fund code Expense class Lock total

Search & filter

Keyword

witch hat

Search

 Reset all Receipt status Awaiting receipt Cancelled Fully received Ongoing Partially received Pending Receipt not required

Close

Order lines

1 record found

POL number	Title or package name	Product ID	Estimated price	Vendor reference number
10000-1	Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.	9781632367709, 9781646510108, 9781632368058, 9781632369291, 9781632368607, 9781632368041	\$30.00	-

< Previous

1 - 1

Next >

Total selected: 1

Save

number Amazon.com G64758-74834

12345

Address

Primary

Receiving

Agreements Bulk edit Check in Check out Circulation log Apps Online

Receiving
1 record found Actions ▾

Title
• Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering

POL number
10000-1

Search

Reset all

Order status

Vendor

Order type

Material type

Order format

Tags

Location

Receiving status

Acquisition unit

Rush

Received date

Expected receipt date

Receipt due

Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering
10000-1
receipt date - One-time

Vendor Amazon.com **Material supplier** Amazon.com

Requester **Receiving workflow** **Rush**
Synchronized order and receipt quantity

Adding or removing pieces from this record will update the purchase order line quantity and location detail and in turn the estimated price.

Expected Filter Actions ▾

Caption	Copy number	Enumeration	Chronology
-	-	-	-

< Previous 1 - 1 Next >

Received

The list contains no items

Receiving

X

10000-1 - Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

Order line locations

Main Library

<input checked="" type="checkbox"/>	Caption	Enumeration	Copy number	Barcode	Piece format	Request	Comment
<input checked="" type="checkbox"/>				9876543 	Physical	Yes	

 Cancel Receive

Receiving

Search & filter

Inventory
Enter search crite...

Actions ▾

[Instance](#)[Holdings](#)[Item](#)

Keyword (title, contributor, identifier) ▾

Search

[Reset all](#)

Effective location (item)

Language

Resource Type

Format

Mode of issuance

Nature of content

Staff suppress

Suppress from discovery

Statistical code

Date created

Date updated

Instance status

Source

Tags

Choose a filter or enter
← a search query to show results.

Inventory
Enter search crite...

Actions ▾

X Instance • Witch hat atelier / Kamome Shirahama ; translation: ...
in0000000011 • Last updated: 8/31/2022

Actions ▾

0

[Collapse all](#)

Instance record (text)

Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.

^ Holdings: Main Library >

[View holdings](#)[Add item](#)

Item: barcode ▾	Status	Copy number	Loan type	Effective loc
9876543	In process	-	Can circulate	Main Library

[Previous](#)

1 - 1

[Next >](#)[Add holdings](#)

^ Administrative data

▼ Record last updated: 8/31/2022 6:18 AM

Instance HRID Source Cataloged date

in0000000011

MARC

-

Instance status term

Instance status code

Instance status

-

-

source

status updated

8/31/2022, 6:17 AM

Mode of issuance

Check in

[Agreements](#)[Bulk edit](#)[Check in](#)[Check out](#)[Circulation log](#)[Apps](#)

Circ Desk 1

Scanned Items

 Scan or enter barcode to check-in item[Enter](#)**Date returned**

today

Time returned

now

Time returned	Title	Barcode	Effective call number string	Location	In-house use	Status	Actions
6:30 AM	Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee. (book)	9876543		Main Library		Awaiting pickup	...

[End session](#)

Check In

[Check out](#)[Agreements](#)[Bulk edit](#)[Check in](#)[Check out](#)[Circulation log](#)[Apps](#)

Circ Desk 1

Scan patron card

Scan or enter patron barcode

Enter

[Patron look-up](#)**Borrower****rick, psych** Barcode: 123**Patron group**

staff

Status

Active

User expiration

-

Open loans

1

Fees/fines owed

0.00

Open requests

0

(0.00 suspended)

Patron blocks

-

Scan items

[New fast add record](#)

Scan or enter item barcode

Enter

No.	Barcode	Title	Loan policy	Due date	Time	...
1	9876543	Witch hat atelier / Kamome Shirahama ; translation: Stephen Kohler ; lettering, Lys Blakeslee.	One Hour	8/31/2022	7:31 AM	...

Total items scanned: 1

[End session](#)

Check Out

Circulation log

[Agreements](#)[Bulk edit](#)[Check in](#)[Check out](#)[Apps](#)

Circ Desk 1

Search & filter

[Reset all](#)**User barcode** [Patron look-up](#)**Item barcode****Description**[Apply](#)[^ Date](#)**From** **To** [Apply](#)[^ Service point](#)

Circulation log

3 records found

[Actions](#)

User barcode	Item barcode	Object	Circ action	Date
123	9876543	Loan	Checked out	8/31/2022, 6:31 AM
123	9876543	Request	Request status changed	8/31/2022, 6:31 AM
123		Request	Created	8/31/2022, 6:21 AM

Circulation Log

The ILS you see today will continue to grow
and change to meet new challenges
because of our COMMUNITY!

Over to Peter ...

The FOLIO Community

FOLIO

Community

- Who?
- What?
- Where?
- When?
- Why?
- How.

Who?



Subject Matter
Experts

Developers

User Experience
Designers

Product Owners

Who?



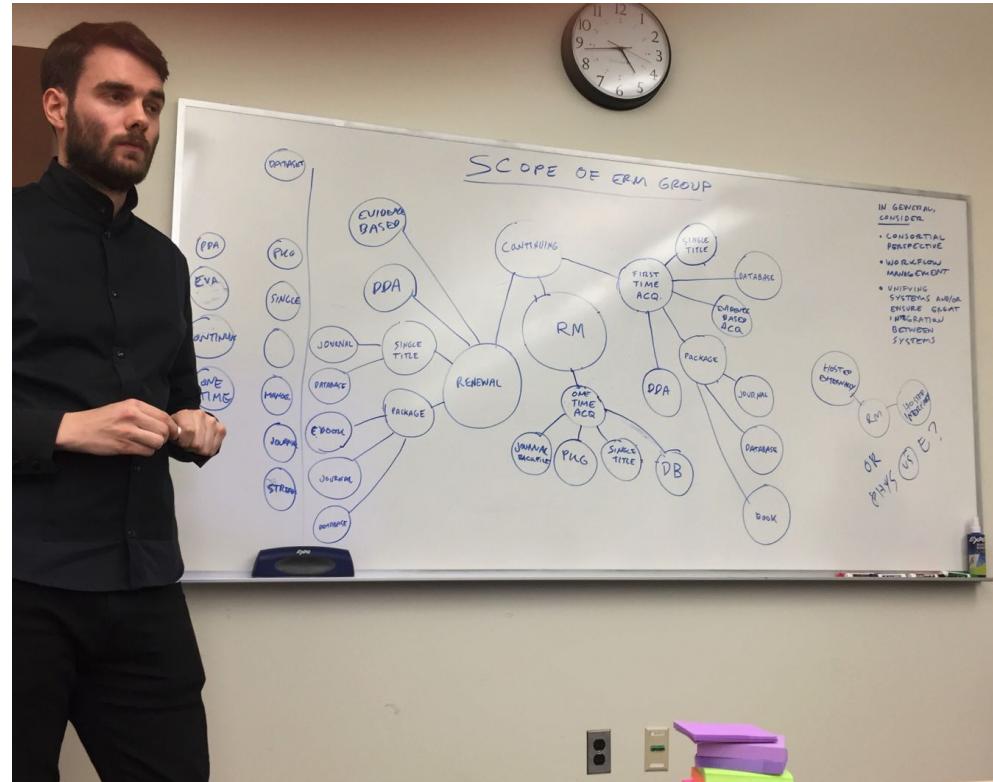
Libraries
Software
developers
Service
providers

What?

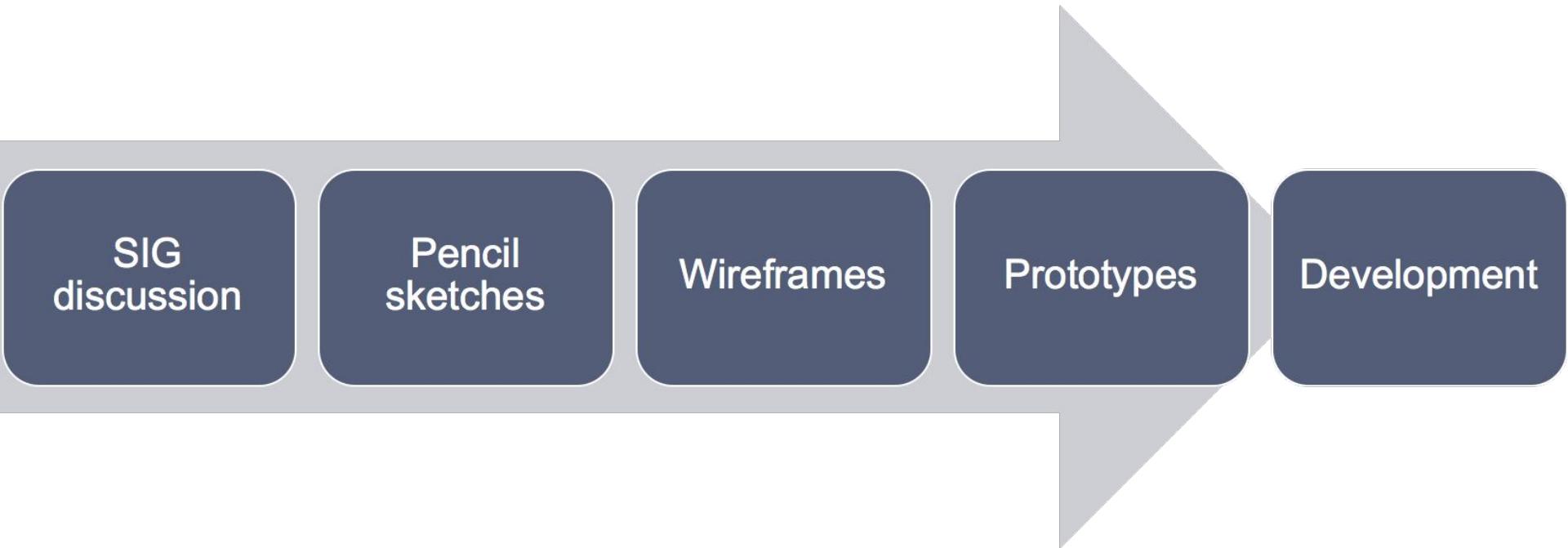
User Experience First Design

"The UX process in FOLIO is built to focus on the needs of the end users from start to finish. We strongly believe that this is the optimal way to create software that is useful, simple and elegant."

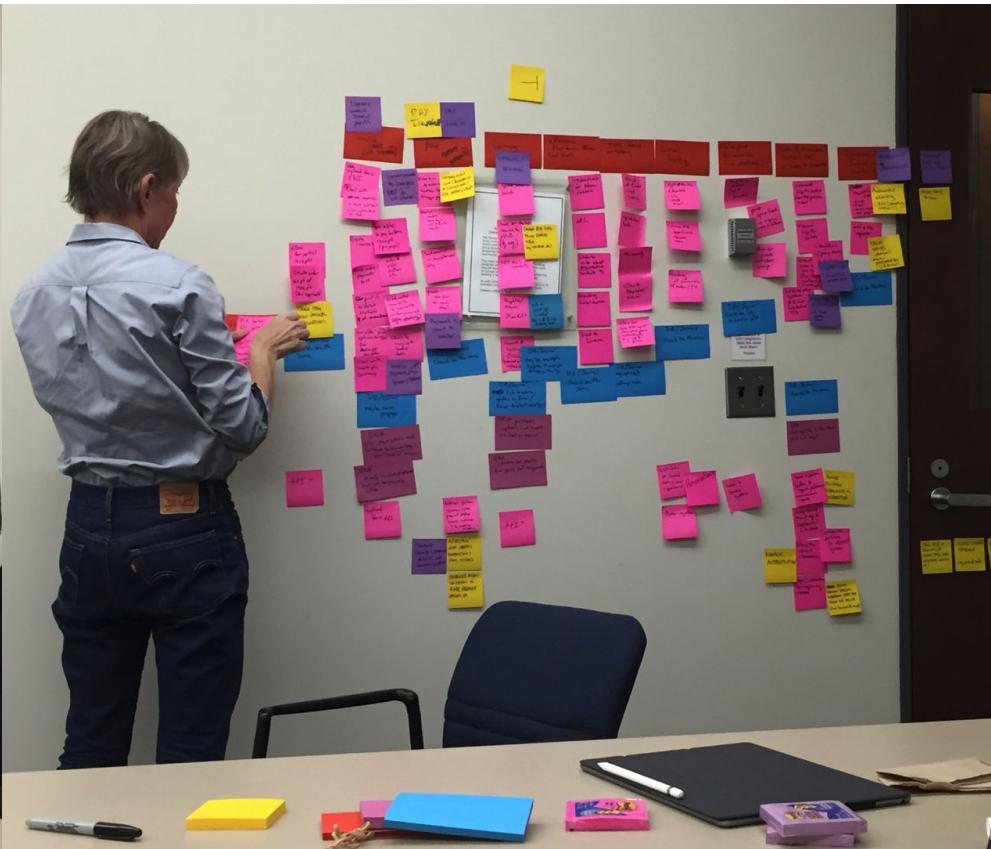
<https://ux.folio.org/docs/guidelines/process/>



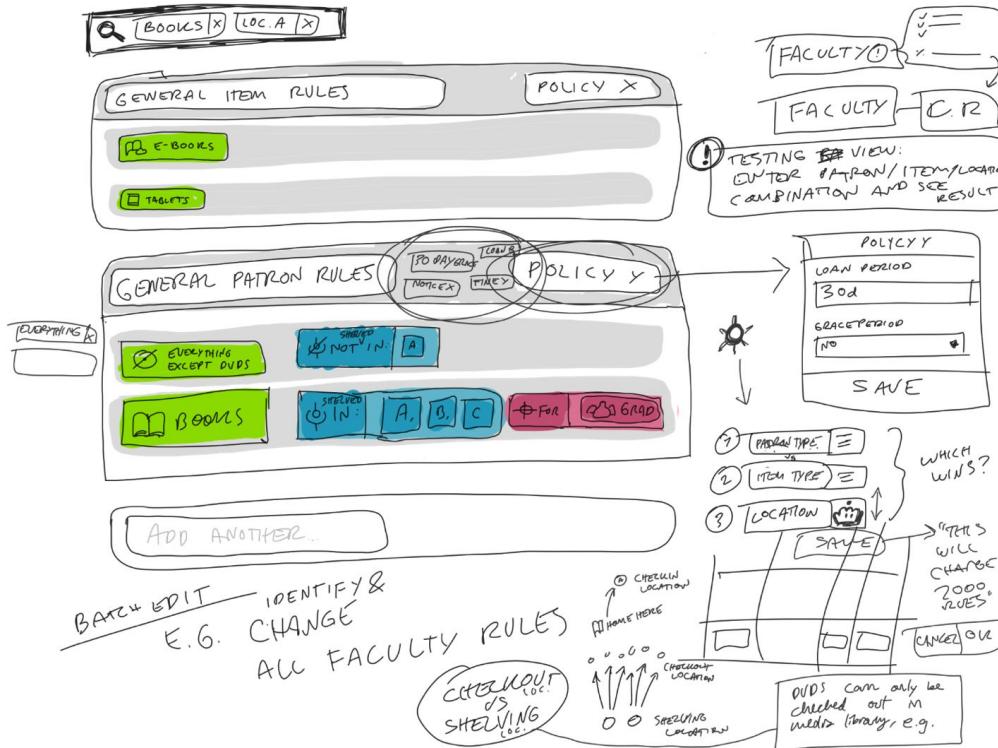
What?



What? – SIG Discussion



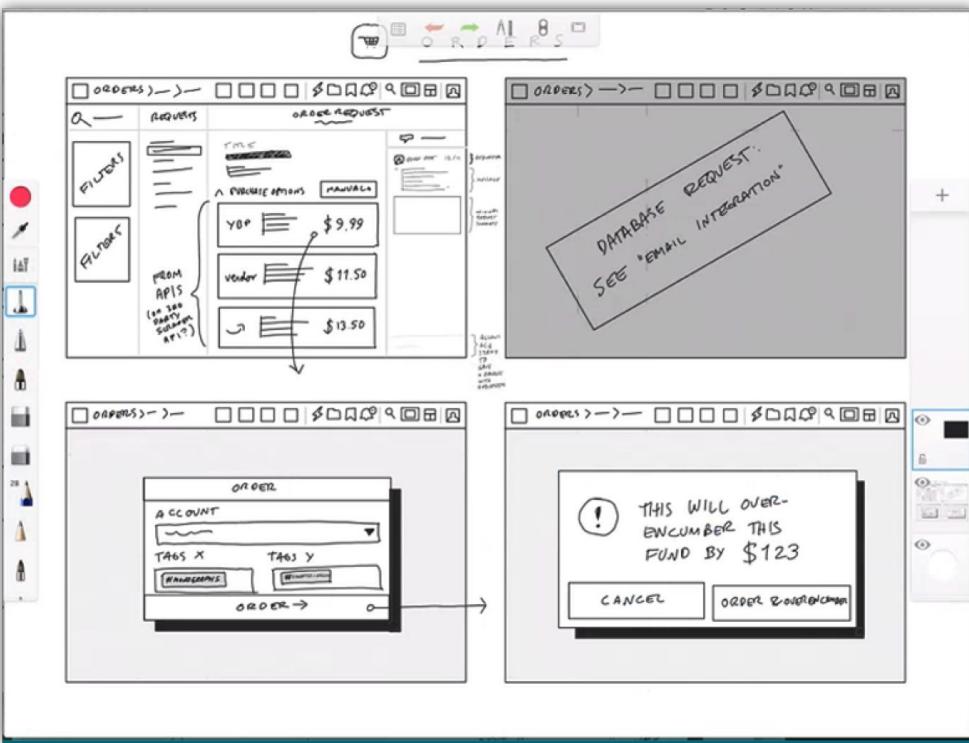
What? – Sketches



"UX designers start researching, engaging in a dialogue with users; sketching out concepts in close collaboration with users, and lastly design the actual interfaces with an ongoing dialogue with users and other relevant stakeholders."

<https://ux.folio.org/docs/guidelines/process/>

What? – Wireframes



"UX designers start researching, engaging in a dialogue with users; sketching out concepts in close collaboration with users, and lastly design the actual interfaces with an ongoing dialogue with users and other relevant stakeholders."

<https://ux.folio.org/docs/guidelines/process/>

What? – Web-based Prototype

The screenshot shows a web-based prototype for a library inventory system. The interface includes a top navigation bar with icons for user profile, search, filters, and other system functions. Below this is a search and filter sidebar on the left containing multiple sections of checkboxes labeled "Something". The main content area displays search results for "Climate change and indigenous peoples" with 403 instances found. A detailed view of one instance is shown in a modal window, which includes tabs for "Instance data" and "Associated holdings". The "Associated holdings" tab lists 22 items from the Main Library and Law Library, each with a status indicator (Available or Unavailable) and a media type (DVD, CD-ROM).

"UX designers start researching, engaging in a dialogue with users; sketching out concepts in close collaboration with users, and lastly design the actual interfaces with an ongoing dialogue with users and other relevant stakeholders."

<https://ux.folio.org/docs/guidelines/process/>

What? – Running Code

The screenshot shows a library management system interface. On the left, there's a sidebar with various search filters and resource types. The main area displays a search results page for '14 cows for America' with 121 records found. One record is selected, showing detailed information: Title '14 cows for America', Contributors 'Deedy, Carmen Agra.; Naiyomah, Wilson Kimeli.; Gonzalez, Thomas', and Publishers 'MUHKA (©2002)'. Below this, the 'Instance data' section provides details like 'Record last updated: 5/3/2018 3:43 AM', 'Instance Record Books', and 'Resource identifier' (ISBNs). At the bottom, there's a 'Holdings: Main Library >' section with a table showing one item: Item: Barcode 5860825104574, Status Available, Material Type book.

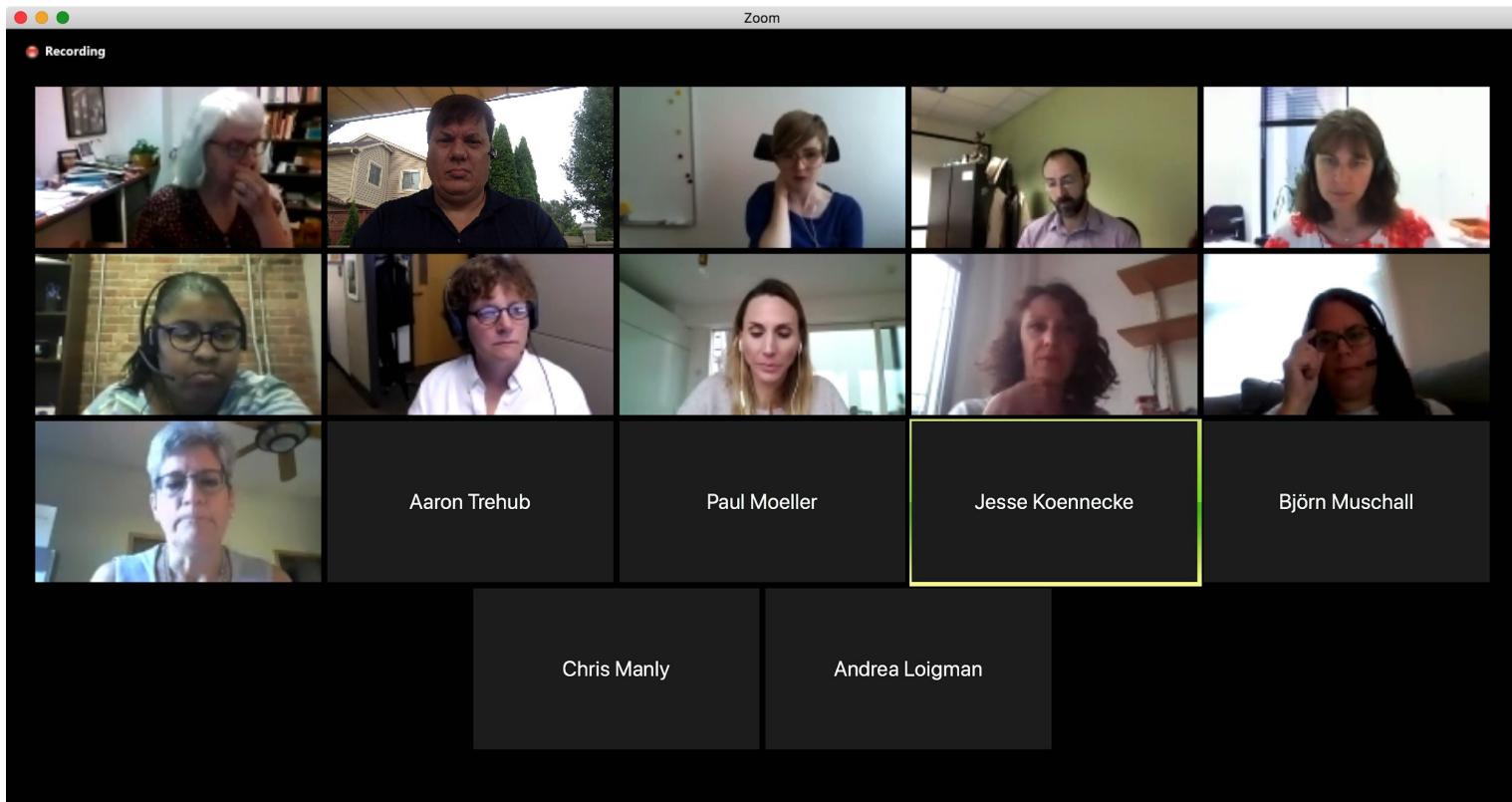
"UX designers start researching, engaging in a dialogue with users; sketching out concepts in close collaboration with users, and lastly design the actual interfaces with an ongoing dialogue with users and other relevant stakeholders."

<https://ux.folio.org/docs/guidelines/process/>

Where?



Where?



Where?

Confluence Spaces People Questions Calendars Create ...

Pages

User Management SIG

Created by Peter Murray, last modified by Michelle Suranofsky on Jun 05, 2018

Today ◀ ▶

Wednesday, Sep 12, 2018

12 Today
Sep • User Management SIG Meeting User Management SIG

19 Wednesday
Sep • User Management SIG Meeting User Management SIG

26 Wednesday
Sep • User Management SIG Meeting User Management SIG

03 Wednesday
Oct • User Management SIG Meeting User Management SIG

10 Wednesday
Oct • User Management SIG Meeting User Management SIG

More

Edit Save for later Watching Share ...

About us

Subscribe Add Event

The User Management SIG, formerly LSP

Meetings

The UM team meets via Zoom on Wednesdays at 10:00 AM Eastern U.S. time (see time in your timezone). For more details, see the [SIG-UM Meeting Tasks and Notes](#).

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SIG Convener

For more information about the User Management SIG,

Where?

World
Open
Library
Foundation

Conference



WOLFcon 2022
Aug. 31 – Sept. 2
Hamburg, Germany

When?

Mon 10	Tue 11	Wed 12	Thu 13	Fri 14
All day				
6am				
7am				
8am	Reporting SIG Meeting =	ERM Subgroup Consortia SIG Meeting Monthly Accessibility SIG Meeting User Management SIG Technical Council Meeting =	Product Council =	Resource Management SIG Meeting =
9am				
10am	Resource Access SIG Meeting =		Resource Access SIG Meeting =	Metadata Management SIG Meeting =
11am				
12pm				
1pm				
2pm		Weekly Facilitators SIG Call =		
3pm				
4pm				
5pm				
6pm				

Why?

To facilitate a sustainable, community-driven collaboration
around the creation of a modern technology ecosystem
that empowers libraries to manage library resources
and expand library value through open source applications.

Why

The FOLIO Project:

- enables the widest and deepest engagement with philosophies and technologies across libraries, software developers, and service providers.
- develops active members to ensure long-term sustainability and advancement.
- creates a space where the community can talk about standards and practice and how libraries operate in a changing environment.

How.



DGJ_4705 - Russian Matryoshka by Dennis Jarvis on Flickr, CC-BY



Newsletter

Sign up for community updates

Subscribe to our monthly newsletter and receive exciting FOLIO updates and event announcements

First name

Last name

Email address

Institution

Country

▼

*All fields required

I want to stay informed and follow progress.

I am a developer interested in all technical and development aspects of FOLIO.

By submitting this form, you agree to our [Privacy Policy](#).

Join Us!



FOLIO YouTube Channel

YouTube Search

PLAY ALL

FOLIOForums

30 videos • 47 views • Last updated on Aug 15, 2018

Open Library Foundation SUBSCRIBED 107

1 FOLIOForum 2018 08 15 Whats new in Resource Access
Open Library Foundation 1:10:24

2 FOLIO Roadmap Update - 2018-07-25
Open Library Foundation 52:02

3 FOLIOForum 2018 04 18 Acquisitions
Open Library Foundation 1:38:10

4 FOLIOForum 2018 03 07 Roadmap Update & Demo
Open Library Foundation 1:39:09

5 FOLIOForum - A Peek Inside Open Source Communities: An Open Panel Discussion - 2018-02-21
Open Library Foundation 1:22:36

6 FOLIOForum 2018 01 17 Introduction to FOLIO APIs Whats the Buzz
Open Library Foundation 37:50

7 FOLIOForum - 2017-12-13 - Year in Review
Open Library Foundation 1:30:55



YouTube

Search

Roadmap

PLAY ALL

FOLIO Roadmap & Demos

11 videos • 65 views • Updated 6 days ago

Open Library Foundation

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1 FOLIO Sprint Review 44-45
Open Library Foundation 1:08:40

2 folio Workflows and To-Do App Walkthrough
Open Library Foundation 9:10

3 FOLIO Sprint Review 42-43
Open Library Foundation 1:36:37

4 FOLIO Roadmap Update - 2018-07-25
Open Library Foundation 52:02

5 FOLIO Sprint Review 40-41
Open Library Foundation 1:30:48

6 FOLIOForum 2018 03 07 Roadmap Update & Demo
Open Library Foundation 1:39:09

7 FOLIO Developers Meeting Summary, January 2018
Open Library Foundation 15:08



FOLIO Project

Overview ↓ Developers ↓ Project Wiki Discussion Boards

FOLIO Project

Sign Up Log In

Welcome to the FOLIO Project Discussion site. If you are looking to talk about the open source library services platform, you are in the right place! We've put together a welcome page to help you get acquainted with the site. If you are used to mailing lists, you might also want to look at how this site behaves like a mailing list.

[Discussion Guidelines](#) | [Code of Conduct](#) | [Privacy](#) | [Terms of Service](#) | [Feedback](#) | [Dismiss this message by clicking the X in its upper right corner](#).

[all categories](#) **Categories** Latest Top

Category	Topics	Latest
Community <small>community@discuss.folio.org - At its heart, FOLIO is about the library community joining in partnership to innovate, develop a new open source library services platform, and transform library technology. This Community category is for learning about the FOLIO work, connecting participants with comm...</small>	33	 Welcome to the FOLIO Discussion Site Site Feedback 2 Mar '17
Software <small>software@discuss.folio.org - The FOLIO platform is extensible at its core, supporting traditional resource management functionality, but focused on the ability to deliver new services. This category has topics for discussing the technical aspects of the FOLIO Library Services Platform.</small>	46	 Embedding/including/adapting/working with of external software for media transport Resource Access 3 9h
Special Interest Groups <small>sigs@discuss.folio.org - Core to the FOLIO community is its Special Interest Groups (SIGs). Each SIG has a category under this category.</small>	297	 Change tracker app, UX iteration 1 User Interface / User Experience 24 12h
		 Ebook metadata/Records in Folio Metadata Management 3 1d
		 License and Agreement start and end dates Electronic Resource Management 5 1d



Special Interest Groups

Metadata Mgt

Resource Mgt

User Mgt

Resource Access

Consortia

Reporting

Privacy

System
Operations and
Management

ERM

[Community Council](#)

[Product Council](#)

[Technical Council](#)



Join FOLIO and OLF



Open
Library
FOUNDATION



Get Involved



Over to Mike ...

The FOLIO Platform

FOLIO is an open platform

- It provides an environment for modules to run in

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- The environment provides facilities for library software

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- It provides an environment for modules to run in
- The environment provides facilities for library software
- Modules are programs that fulfil a defined contract
- The FOLIO LMS is merely a set of modules

 **Users** ▾

 Agreements

 Bulk edit

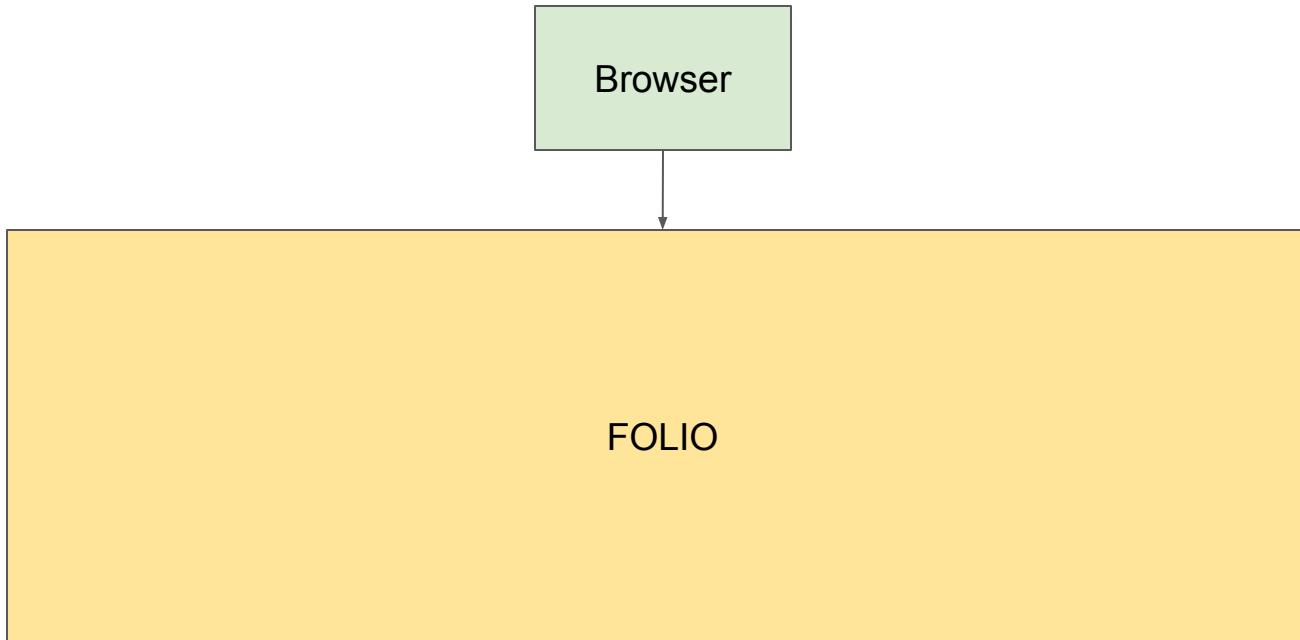
 Check in

 Check out

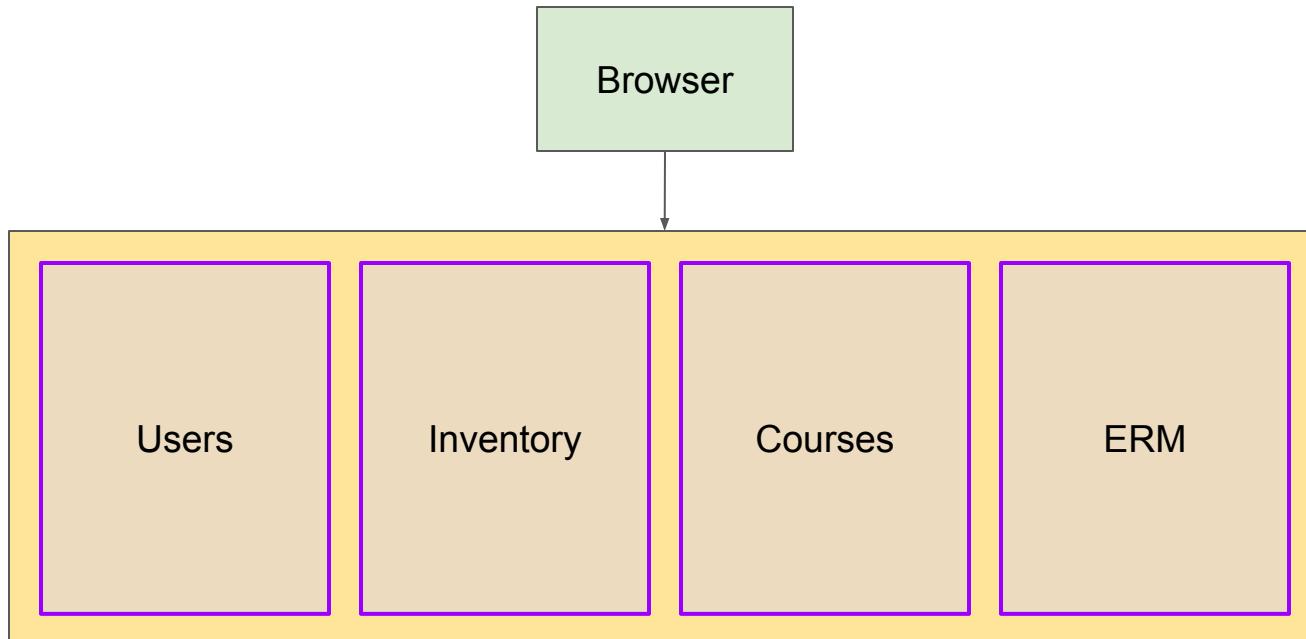
 Circulation log

 Apps ▾

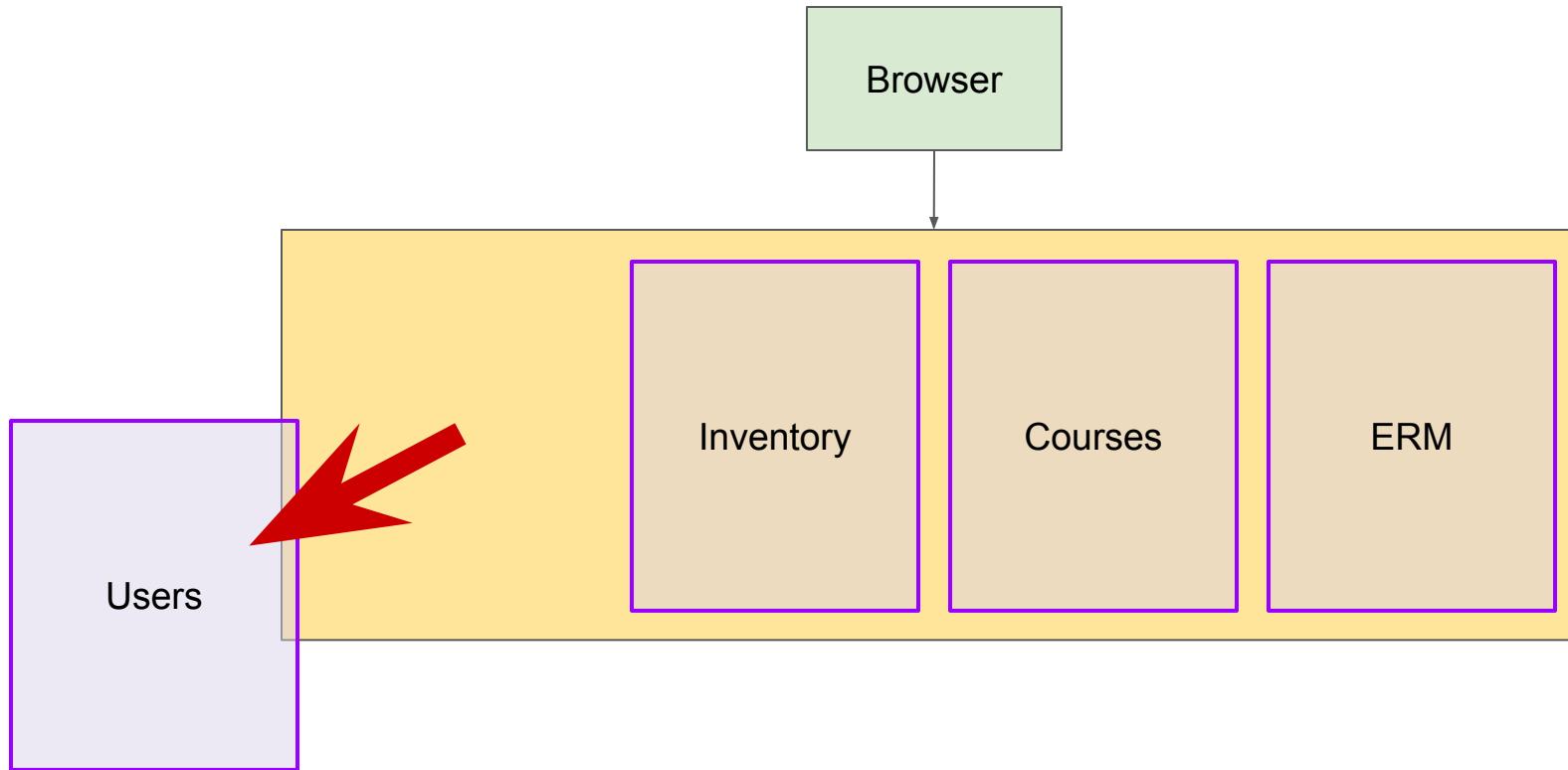
FOLIO was designed to be modular



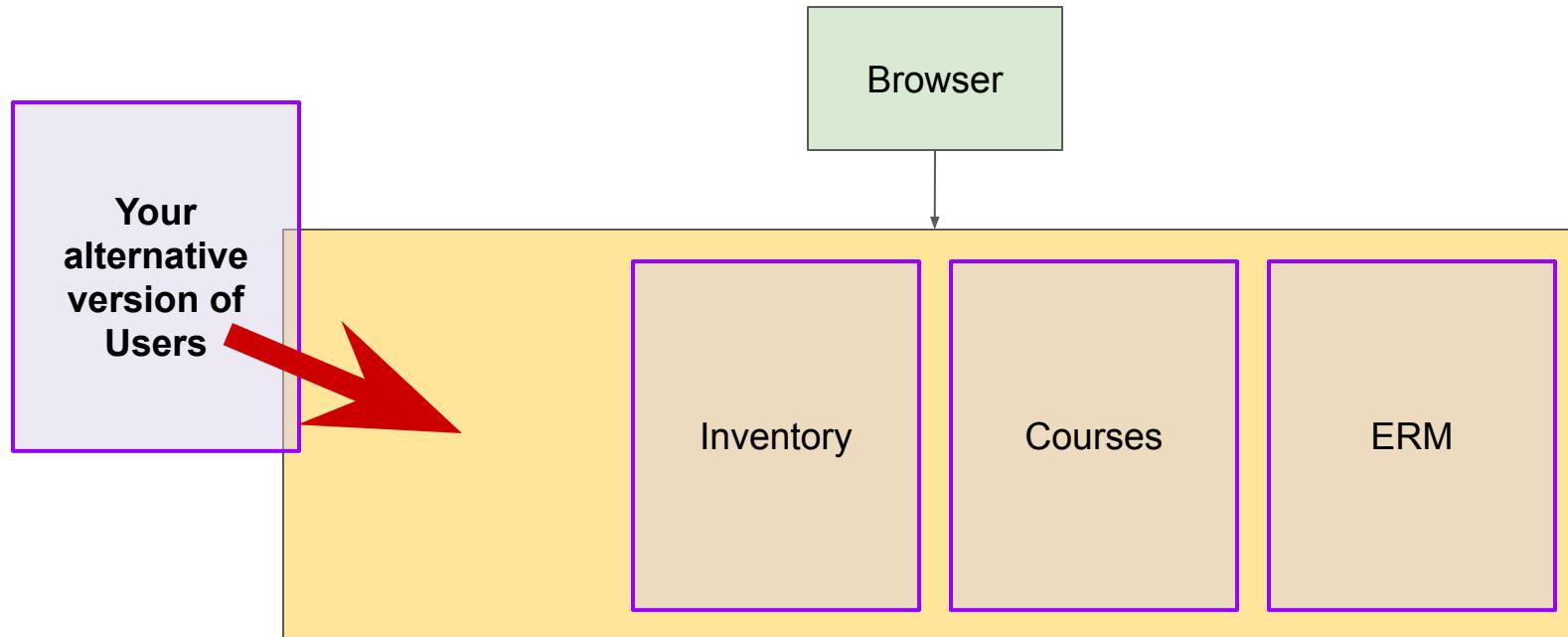
FOLIO was designed to be modular



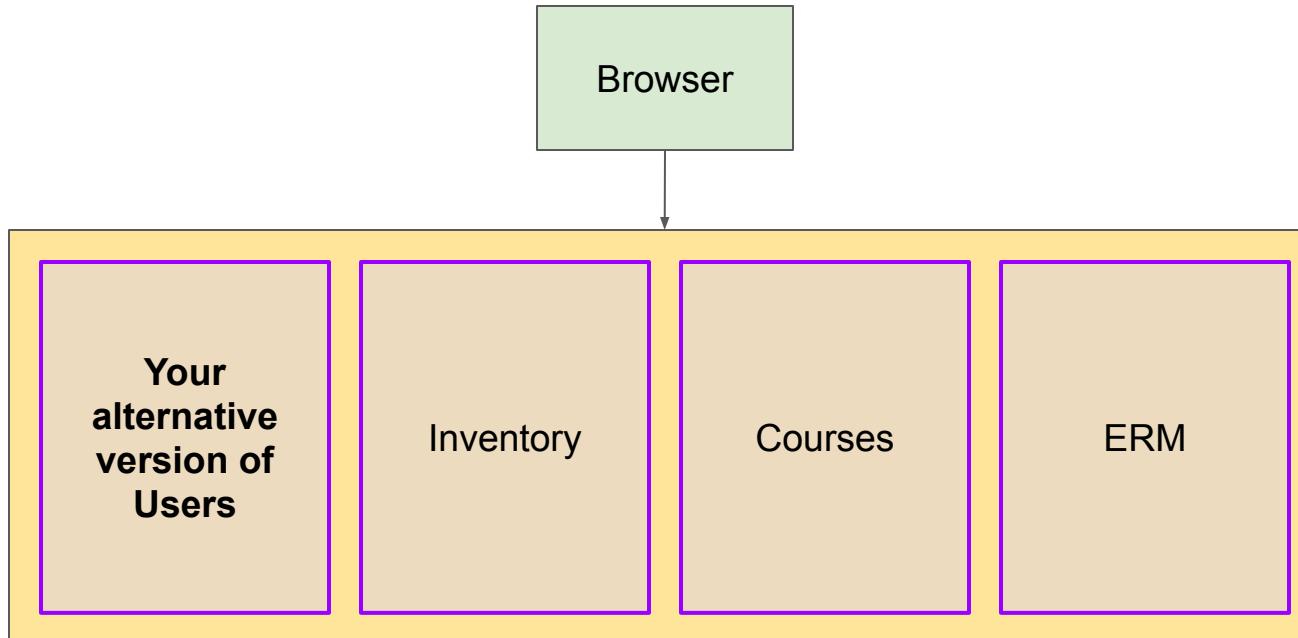
Dependencies on interfaces, not implementations



Substituting interface-compatible modules



Substituting interface-compatible modules



What does the platform consist of?

- The Stripes framework that UI modules run in

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- The Stripes framework that UI modules run in
- Stripes libraries that UI modules can use
- Okapi, the OK API gateway
- Shared conventions
 - (e.g. JSON-based WSAPI)

```
GET /groups?limit=200&query=faculty

{
  "totalRecords": 1,
  "usergroups": [ {
    "id": "503a81cd",
    "group": "faculty",
    "desc": "Faculty Member",
    "expirationOffsetInDays": 365,
  }]
}
```

What does the platform consist of?

- The Stripes framework that UI modules run in
- Stripes libraries that UI modules can use
- Okapi, the OK API gateway
- Shared conventions (e.g. JSON-based WSAPI)
- Authentication and permissions infrastructure

Platform use in other applications

Platform use in other applications

- The ReShare resource sharing suite

The screenshot shows the ReShare Request application interface. The top navigation bar includes links for Users, Directory, Request (highlighted in blue), Supply, Update, Apps, Help, and Circ Desk 2. On the left, there's a sidebar with search/filter options, including a dropdown for 'All fields' and search/reset buttons. Below that are checkboxes for 'Needs attention', 'Unread messages', 'Hide completed', and a dropdown for 'State'. The main area displays a table titled 'Requests' with 107 records found. The columns are: Request Id, Created (sorted), Updated, Item barcode, Patron, State, and Type. The data includes various requests with details like item barcodes (e.g., 0073532959, 39175000039840) and patrons (e.g., Denault, Tajj, Debra).

Requests							
107 records found							
Actions ▾	New	Request Id	Created ▾	Updated	Item barcode	Patron	Type
		EAST-596	8/18/2022	8/19/2022	0073532959	Denault, Tajj	Shipped
		EAST-541	7/20/2022	7/20/2022		Denault, Debra	Cancel pending
		EAST-537	7/4/2022	8/22/2022	39175000039840	tajj0226	Return shipped
		EAST-535	6/21/2022	7/26/2022		tajj0226	Cancel pending
		EAST-524	6/7/2022	6/7/2022	123	Denault, Debra	Return shipped
		EAST-523	6/7/2022	6/7/2022	123	Denault, Debra	Return shipped
		EAST-520	6/7/2022	6/7/2022	123	Denault, Debra	Shipped

Platform use in other applications

- The ReShare resource sharing suite
- Maybe an institutional repository?



Platform use in other applications

- The ReShare resource sharing suite
- Maybe an institutional repository?
- **Others that we have not dreamed of yet**

???

More on FOLIO as an open platform

Taylor, Michael P. 2021. Modularity in FOLIO: Principles, Techniques and Tools. *International Journal of Librarianship* 6(2):3-12. doi:10.23974/ijol.2021.vol6.2.208

tinyurl.com/folio-mod

More on FOLIO as an open platform

Come to my talk at 11:30am on Thursday!

- *FOLIO modularity in practice: seamless deployment of modules from multiple sources*

What is FOLIO?

Three answers

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Peter Murray peter@indexdata.com

