

# FOLIO: Open-Source-Informationsplattform

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# FOLIO =

**F**uture

**O**f

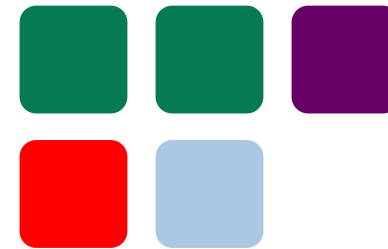
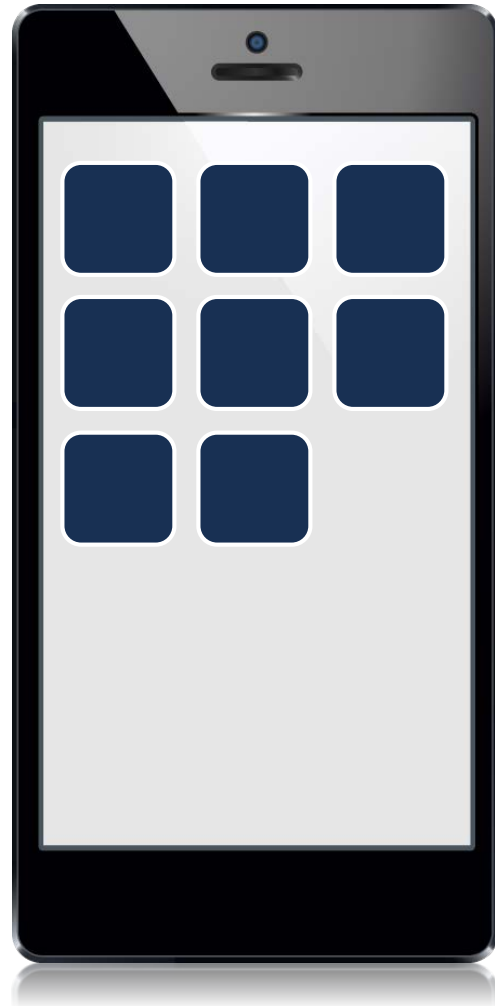
**L**ibraries

**I**s

**O**pen

**GEMEINSCHAFTSBASIERTE  
OPEN-SOURCE-PLATTFORM  
FÜR BIBLIOTHEKSDIENSTE**

# Modularisierbarkeit!



# EBSCO-AppStore als Beispiel: <http://cloud.ebsco.com/apps/>

The screenshot displays the EBSCO Apps & Cloud Services website. At the top, there is a navigation bar with the EBSCO logo, the text "EBSCO Apps & Cloud Services", and links for "Cloud Services", "Apps", "Custom Services", and "Contact Us". A search bar and a "Blog" link are also present. On the left side, a "Categories" sidebar lists various options like "All", "Analytics", "API Plugins", "Content Spotlights", "International", "Library & Catalog", "Medical", "Search Add-ons", "Search Boxes", and "Try it in Beta". The main content area is titled "Apps" and features a search bar labeled "Search Collection". Below the search bar, it indicates "Showing 1-24 of 175" and a "Platform: Show All" dropdown menu. The main content area displays a grid of application cards. Each card includes an icon, the app name, and a brief description. The visible cards are: "Academic Search Authority" (with a stack of books icon), "API interface for Yordam ILS" (with a YORDAM logo icon), "Arab Database Results" (with an ARAB Database Results icon and Arabic text "قواعد بيانات"), and "Ask a Librarian" (with an ASK a Librarian icon). Below these, there are four more icons, each with a "BETA" label, representing additional apps.

Searching: **EBSCO Discovery Service**

Keyword ▾

Enter any words

Search



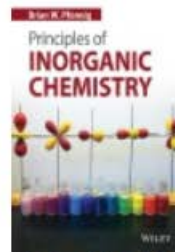
[Search Options](#) ▶ [Basic Search](#) [Advanced Search](#) [Search History](#)

Please enter search term(s).

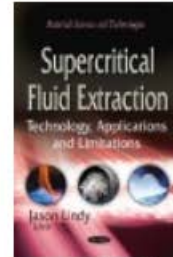
## Highlighted eBooks



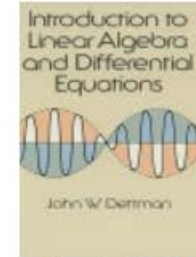
Chemicals From Biomass...



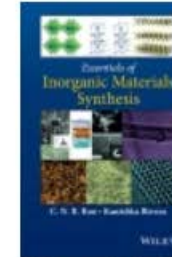
Principles of Inorganic...



Supercritical Fluid Extraction...



Introduction to Linear...



Essentials of Inorganic...



Searching: above and beyond MeSH

Stichwort ▾ pulmonar

Einfache Suche Erweitert

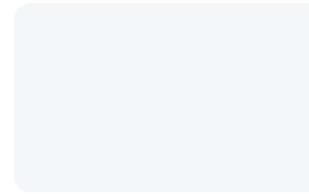
184 Ergebnisse in Norm

13: Surfactant-assozii  
Englische/r Begrif  
Associated Proteins

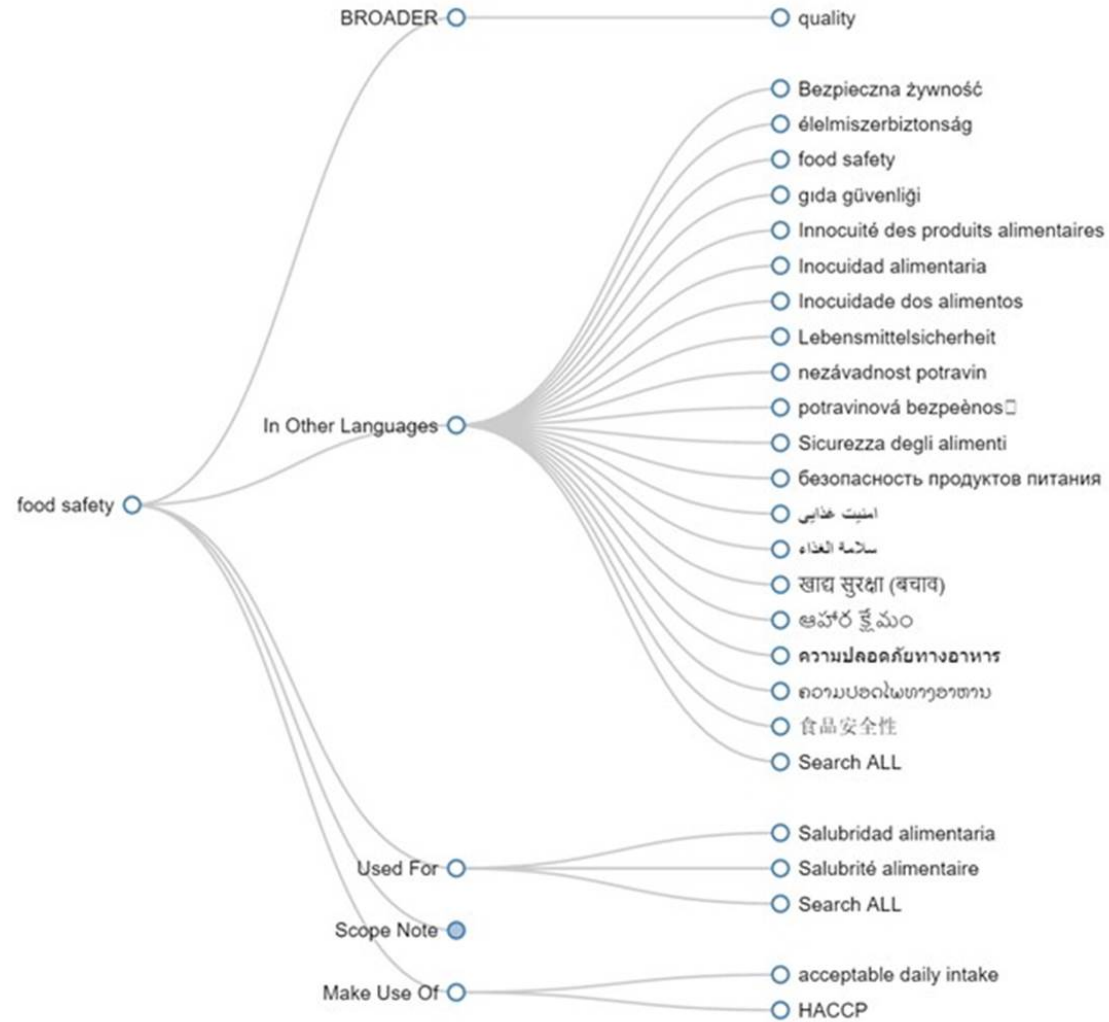
14: Vasculäres Remo  
Englische/r Begrif

15: Stenose, Pulmona  
Englische/r Begrif  
Artery

Daten zur Verfügung g



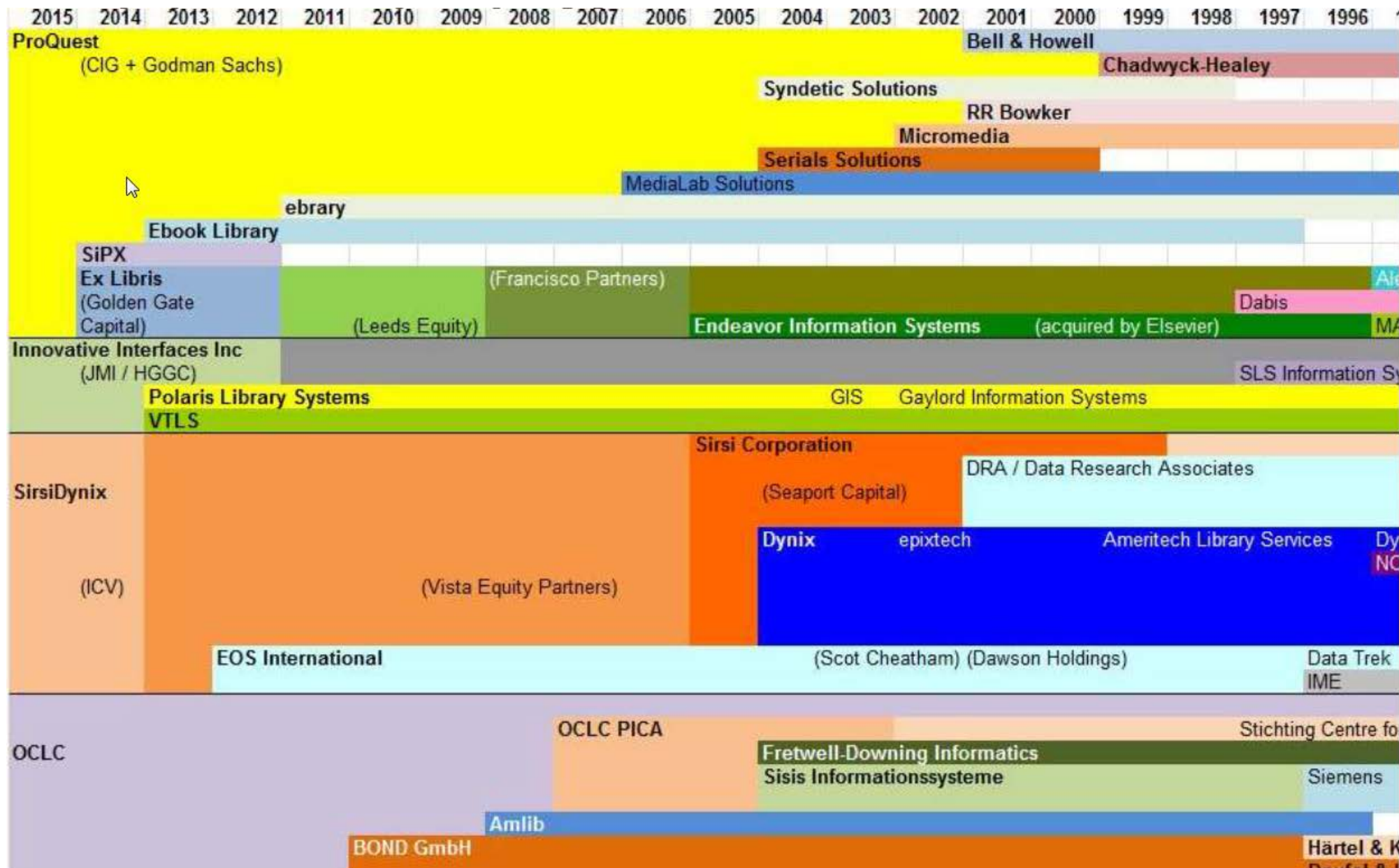
Pulmonale I



EDS Thesaurus Visual Navigation ()



@marketoonist.com





# SaaS?



*“Its launch opens **a new chapter** in the library technology industry — potentially wielding an even **greater impact than the latest rounds of mergers and acquisitions.**”*

– Marshall Breeding in American Libraries, April 22, 2016

*“With FOLIO, the future is open: open to new relationships, open to true collaboration and open to capacities that will enable libraries to achieve our mission of service to users. For the first time, **libraries will be not only customers but investors** with vendor partners in defining the future of library systems.”*

– David Carlson, Dean of University Libraries at Texas A&M University, June 24, 2016

### OLE / Gemeinschaft

Beratung  
“Community Building”  
Forenausbau  
Entwicklung

### EBSCO

Finanzierung  
Projektberatung  
“Community Outreach”

### Index Data

Projektarchitektur  
Plattform und Apps  
Entwicklung

### GBV, hbz, EBSCO

Hosting und Services  
Regionalisierung  
Entwicklung

## — DIE KOOPERATIONSPARTNER —

# EBSCO

Ca. 70 Partnerschaften

---

Koha und OLE

---

**BIBLIOTHEKSSYSTEME**

Open-Source & Partnerschaften

# Die Plattform

“Stripes” = UI Layer

Erw.

Kat.

Ausl.



Discov.

Link-  
Res.

Fernl.

Repos.

Forsch  
ungs-  
daten

...

OKAPI (API Gateway)

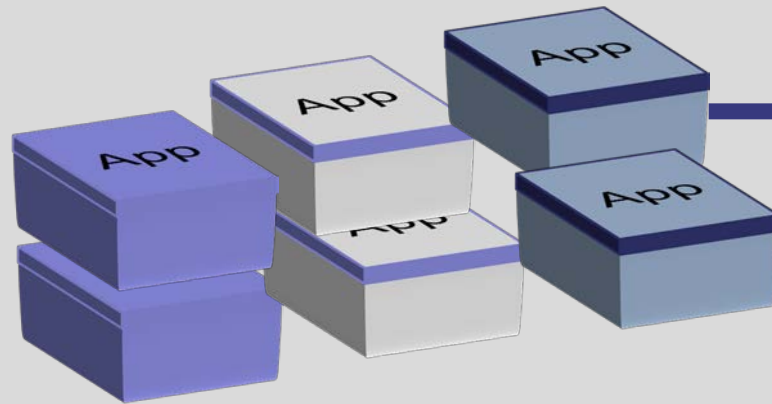
KB

KB

System Layer



Statist.



“Linked Data Triplestore”

Data Mining

Forschungsdaten

Repositorien

“Learning Management”

Museenspezifika

Ressourcenplanung

Weiterf. Analysen

Lehrergebnisverwaltung

## Imagine... - besondere Module

Jenseits des klass. ILS/LMS: der FOLIO-Unterschied

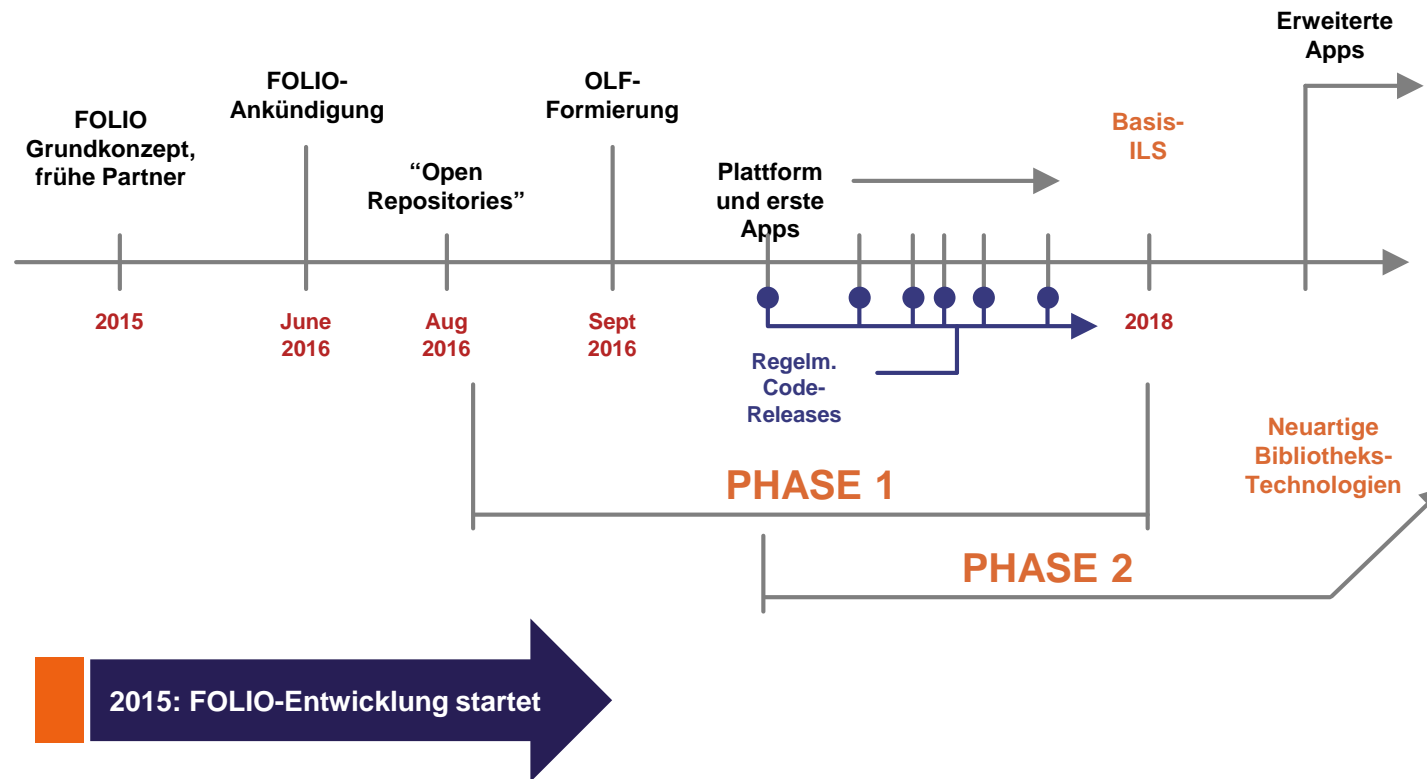


Projektmanagement  
Datenmigration  
Training  
**Hosting**  
Regulärer **Support**  
Beratung  
Integrationservices  
App-Anpassung

# Hosting, Service und Support

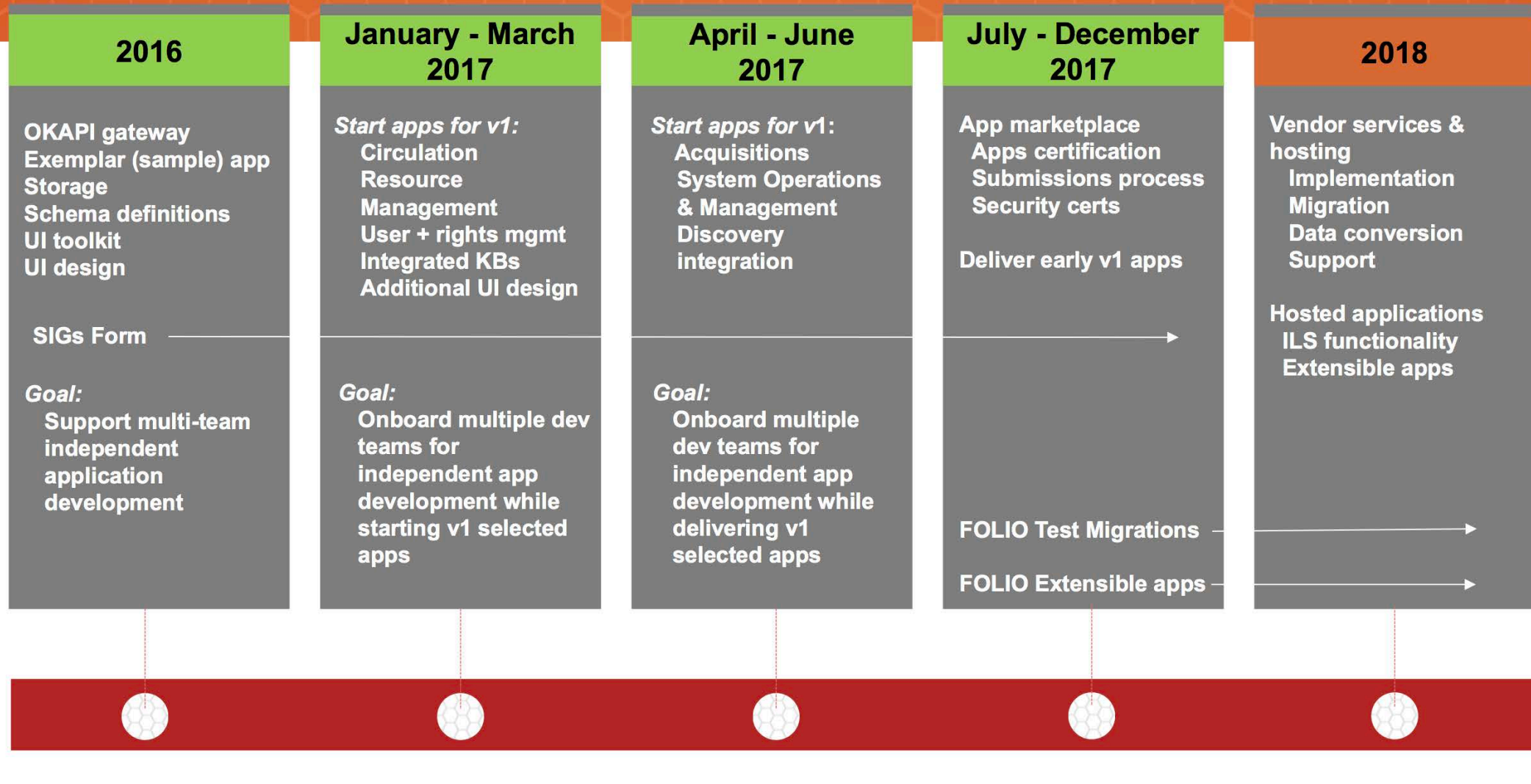
durch Verbände, Dienstleister  
*oder* Eigenhosting

# FOLIO-ZEITPLAN





# FOLIO Platform Project Plan



<http://wiki.folio.org/display/PC/FOLIO+Roadmap>

# WEITERE QUELLEN:

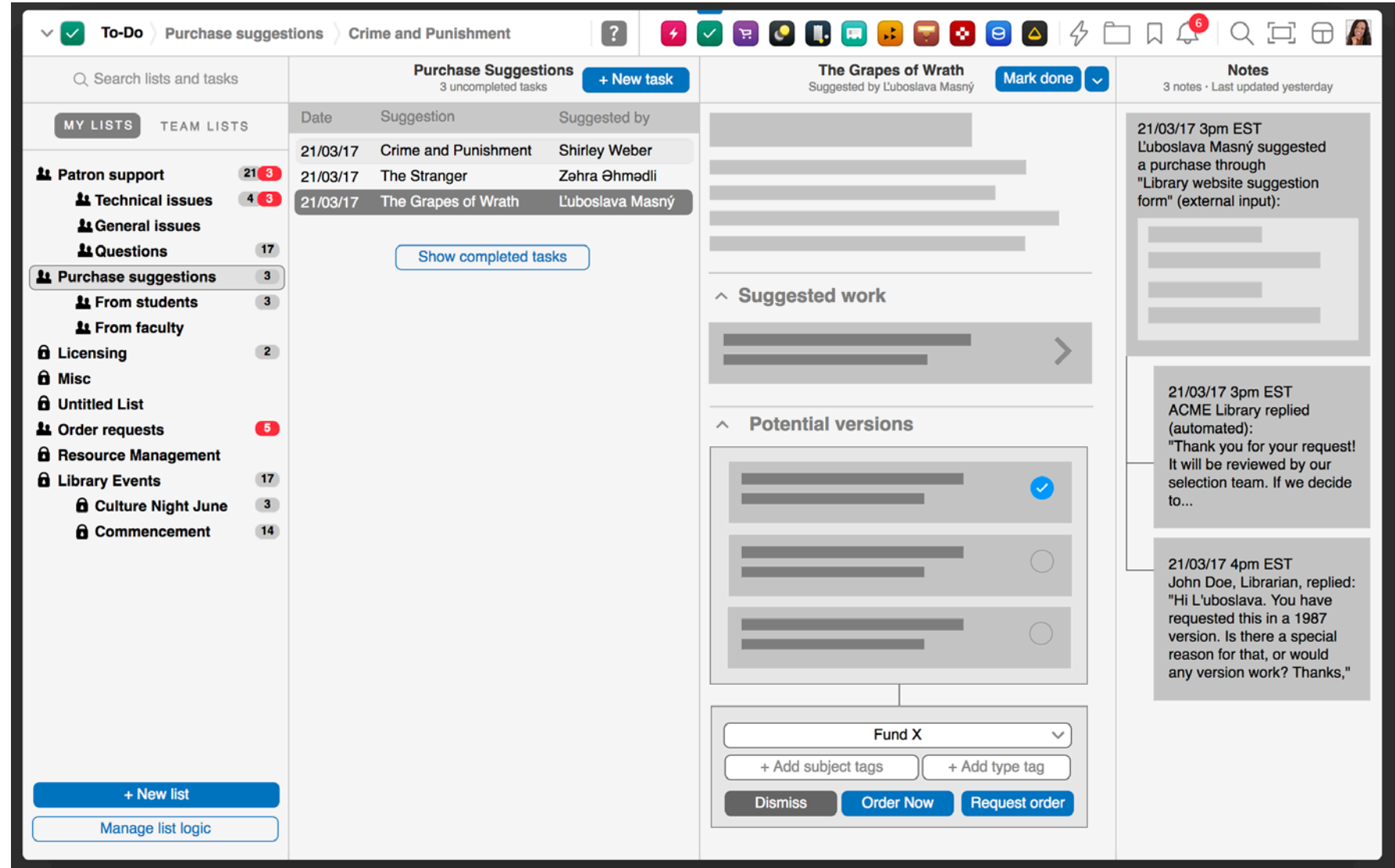
- Offizielle Roadmap:  
<https://wiki.folio.org/display/PC/FOLIO+Roadmap>
- UI Design:  
<https://pr.to/D7XIAW/>
- SIG-Protokolle:  
<https://wiki.folio.org/display/PC/Special+Interest+Groups>
- GBV-Spezifikationen:  
<https://www.ole-germany.org/display/OLE/b.+Erarbeitete+Anforderungskataloge>
- Funktionale Matrix—sehr ausführlich und stets veränderlich:  
<http://bit.ly/2nUGAQ8>

	A	B	C	D	E	F	G
1	eta						
2	Essential features for managing all types of materials: holdings management, orders, licensing, access, coverage dates, usage and other statistics. Defines interactions needed between libraries, vendors, and other parties necessary for successful resource management.						
3	Features:						
4	FeatureID	R	Feature name	Description	Expected Outcomes		FM #ID
5	Resource Management	1	Specify and manage holding & packages for entire collection, including electronic and print.	Provides the ability to create custom packages/relationships between the different entities such as packages, titles, publishers, platforms, consortia, groups. What happens when a title moves to a new package/publisher?		Managing holdings is part of cataloguing, too. In ERM tool packages + titles	ID519
6	Resource Management	1	Access to global KB for efficient holdings/resource management			Update / download is necessary, Data flow models	ID518, ID519
7							
8							
9	Resource Management		Capture resource terms and conditions	Capture key permissions and prohibitions of licenses (follow ERM guidelines) for resources and assign/link these to orders and/or resources in an efficient manner (i.e. assign to "vendor" and be able to display with any package or package-title from that vendor.) Provide authorized library faculty and staff with easy access to this information. Additional docs that explain current thinking: <a href="https://wiki.folio.org/display/~marcjohnson/Knowledge+Base+and+Metadata+-+Scope+and+Domain">https://wiki.folio.org/display/~marcjohnson/Knowledge+Base+and+Metadata+-+Scope+and+Domain</a>	- librarians have a quick reference for key terms and conditions; for instance, check ILL status of a resource without having to read the actual license. - Ability to create reports on items that have common criteria. i.e. all titles that allow scholarly sharing	VZG: Divided into general and individual conditions. Conditions need to be stored as document (all kinds of documents, contracts, emails, etc.... ) and in default, machine readable fields for transition into discovery service; add search functionality	
10	Resource Management	1	Capture administrative details about resources	Allow efficient storage of administrative details of resources (i.e. URL to admin module, un/pw of admin module, configuration notes, etc.) to provide authorized staff with easy access to the details they need to manage the resources. (The details to capture can be influenced by ERM but should focus on capturing the most needed details not simply following ERM to the letter)	- librarians needing to "administer" a database or platform can find the URL to the admin module and login requirements. - librarians updating platform settings and configuration have an online source that explains choices made to allow consistent management of resources. - librarians can run reports to find resources with common attributes, ie. a list of resources that can be accessed with Shibboleth or OpenAthens.		
11	Resource Management	1	Import data: holdings	Allow holdings (entitlements) to be imported directly from publishers and content providers using standard approaches and are represented as part of the institution's holdings and available to discovery and link resolvers. This is required for print and electronic. This also implies automatic selection of packages and	- reduce the workload by automatically capturing holdings. - improves quality of collection by improving accuracy of holdings and links. - reduce workload by automatically		

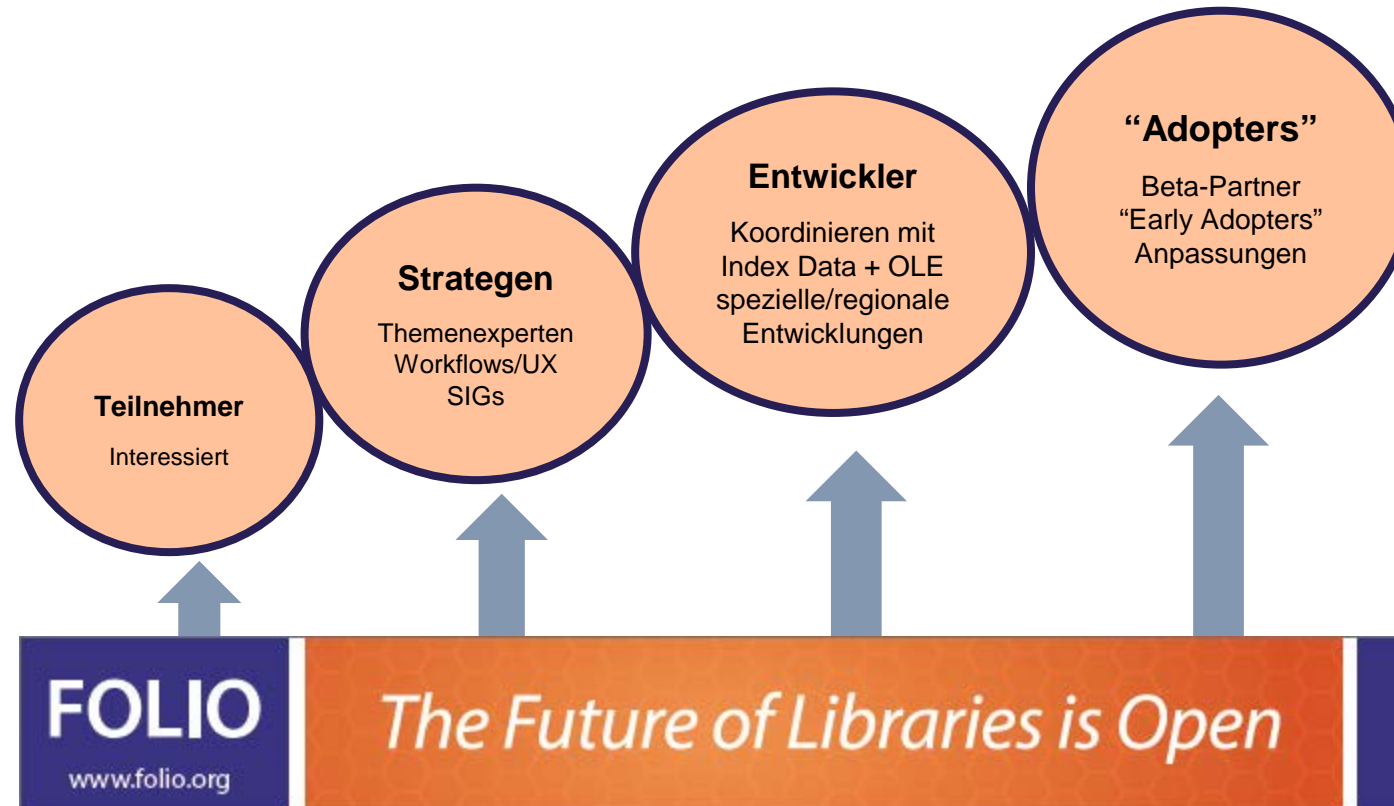
☰
OverviewNotes ▾
User Management ▾
Resource Access (circulation) ▾
Acquisitions ▾
Resource Management ▾
Metadata Management ▾
Reporting ▾
I18n ▾
Sys Ops & Mgmt ▾
Accessibili

# UI-Prototyp:

<http://ux.folio.org/>



# ARTEN ZUM PROJEKT BEIZUTRAGEN



# FOLIO-TEILNAHME IN ZAHLEN

- **3.000+** Bibliotheken auf FOLIO.org registriert
- **600+** Bibliothekare signalisieren Bereitschaft, mitzuentwickeln

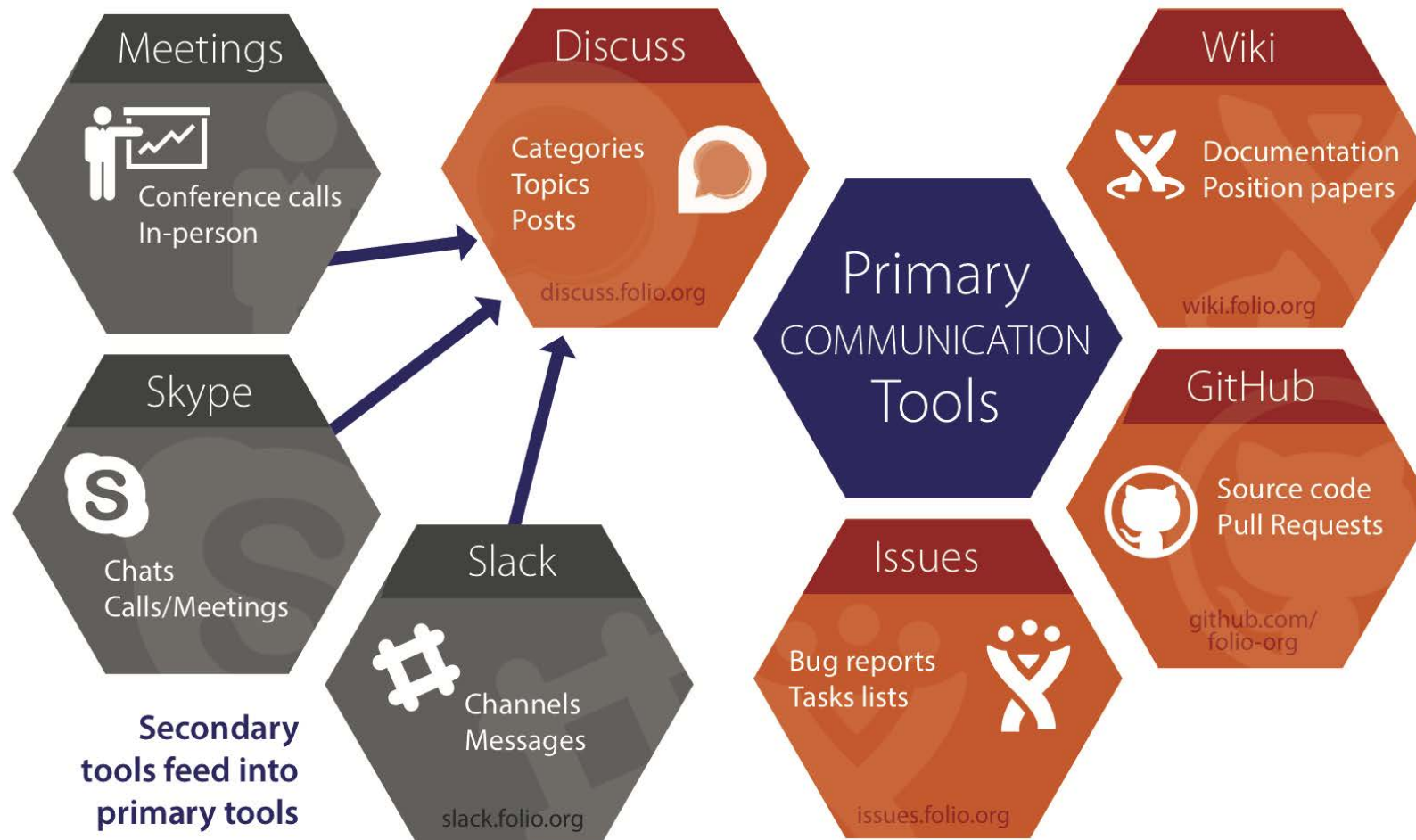


**Sharon Wiles-Young**  
Director of Library Access Services  
Lehigh University, PA

## Lehigh University and FOLIO

<https://vimeo.com/202069427>

# FOLIO-Kommunikationskanäle



<https://wiki.folio.org/x/dgAB>



# Ressourcen

Resource	URL	Description
Hauptseite	<a href="http://folio.org/">http://folio.org/</a>	Marketing und Grundinformationen
Entwickler	<a href="https://dev.folio.org/">https://dev.folio.org/</a>	Seite speziell für Entwickler – enthält aber auch alle untenstehenden Links.
GitHub Repo	<a href="https://github.com/folio-org">https://github.com/folio-org</a>	Quellcoderepositorien
Slack	<a href="http://folio-project.slack.com">http://folio-project.slack.com</a>	Konversationen über den offiziellen Chatkanal – “fast and furious”
Diskurs	<a href="http://discuss.folio.org/">http://discuss.folio.org/</a>	Discussionen: Zusammenfassung der Slack-Konversationen
Wiki	<a href="https://wiki.folio.org">https://wiki.folio.org</a>	Referenz-Wiki: formelle Papiere und Documente. Heimat der SIGs.

## FOLIO The Future of Libraries is Open

A community collaboration to redefine library technology

### News Bits

#### #FOLIOBuilds - Let's Talk About Building Something New

In addition to the core functionality that will be offered by FOLIO's platform, what would be the first app that you want for your library? Tell us about it by tweeting your answer using the hashtag #FOLIOBuilds. One lucky person will win a fun prize for contributing to the discussion!

Are you headed to ALA Midwinter Conference? If so, look for the FOLIO postcard in your conference bag. You can write your answer on the postcard and drop it off at Index Data or EBSCO's booth.



#### Poll Question: What Excites You About FOLIO?

Let's hear from you - why are you excited about FOLIO? Take this quick poll; we'll share answers from the community in future updates.

Answer the question

## Newsletter

- Zweiwöchentlich
- Anmeldung auf [folio.org](http://folio.org)

# The “Kabalog”



Michael Winkler

10th March 2017

FOLIOForums,  
Functional, Strategic,  
Technical

# FOLIO

*The Future of Libraries is Open*

**Event: The “Kabalog”**

**Time: Wednesday, March 29, 2017 at [11:00AM EST / 1600 GMT](#)**

**Recording [Here](#)**

The screenshot shows a video player interface. The main content is a diagram titled "Evolution" illustrating the relationships between various library entities. The diagram is organized into several boxes and connected by arrows:

- KB Location** (Physical Location) is linked via "references" to **KB Title** and **KB Package**.
- KB Title** and **KB Package** are linked via "selects" to **Holding**.
- Holding** is linked via "enables" to **Subscription**.
- Subscription** is linked via "triggers" to **Usage**.
- Usage** is linked via "creates" to **User**.
- Location** (Physical Location) is linked via "references" to **Instance** and **Physical Instance**.
- Instance** is linked via "references" to **Physical Instance**.
- Physical Instance** is linked via "copies" to **KB Title** (Physical) and **KB Title** (Other).
- Physical Instance** is linked via "is located at" to **Physical Location**.
- Physical Instance** is linked via "creates" to **Physical Item**.
- Physical Item** is linked via "enables" to **Lease**.
- Lease** is linked via "creates" to **User**.
- Work** is linked via "creates" to **Instance**.
- Work** is linked via "creates" to **Physical Instance**.
- Public Codes** is linked via "enables" to **Instance**.
- Inventory** is linked via "enables" to **Physical Instance**.

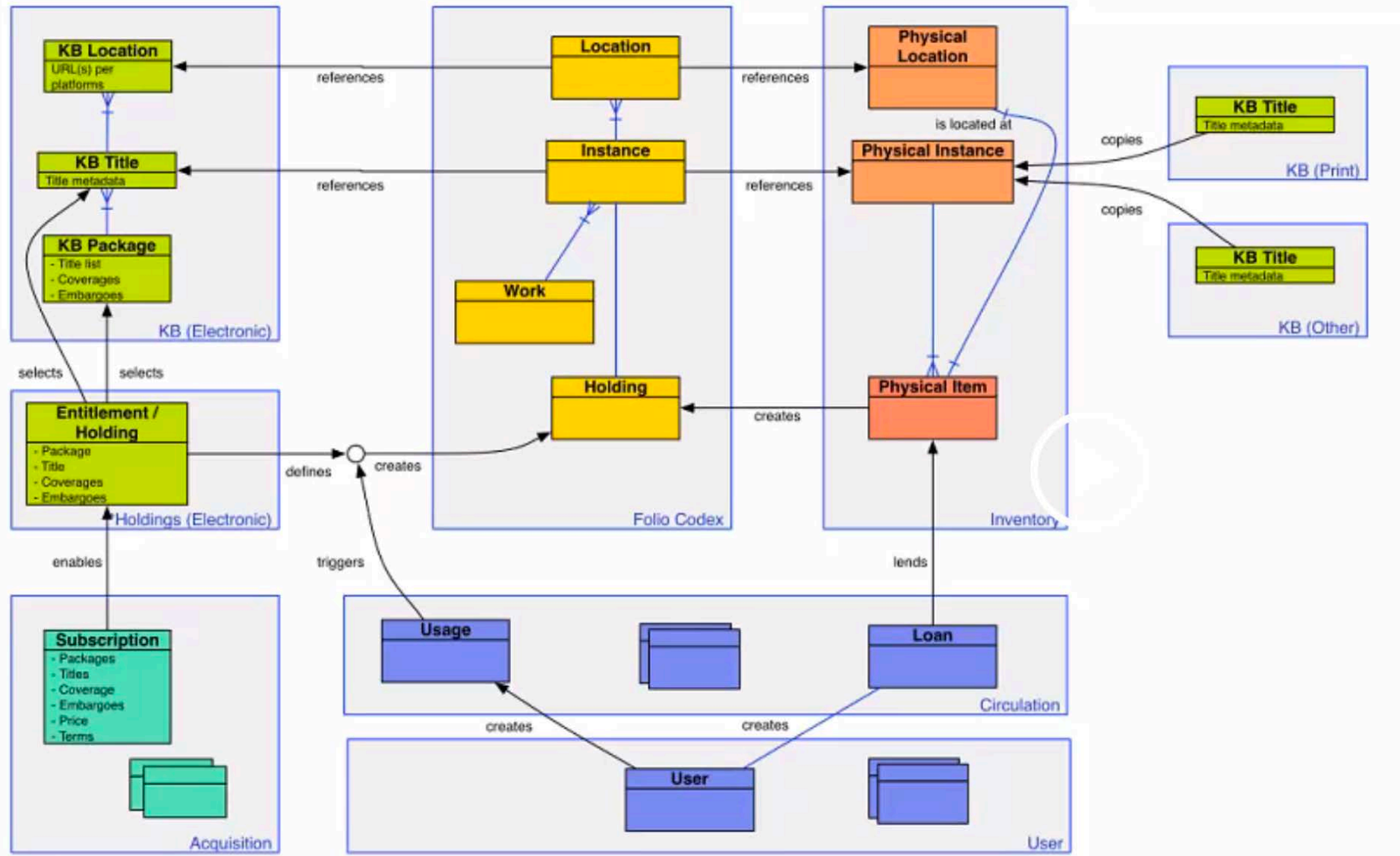
At the bottom left of the diagram, it says "28 | folio.org" and "FOLIO".

On the right side of the video player, there is a Q&A chat window with the following messages:

- Christina Linde: (11:07:18 AM)
- Q: I can't hear anything
- A: (Michael Winkler-11:07:18 AM) audio is running, please check your webex audio setup under the "Communicate" menu.
- Christina Linde: (11:09:11 AM)
- Q: I did when I logged in and again but am not hearing the speaker.
- A: (Michael Winkler-11:09:11 AM) I'm not sure what the problem is for you. you might want to try another browser

At the bottom of the video player, there is a progress bar showing "00:53:25" and "01:12:41".

# Evolution



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
<p><b>Community</b></p> <p>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...</p> <p>■ Forum Facilitators</p>	15
<p><b>Software</b></p> <p>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.</p>	16
<p><b>Special Interest Groups</b></p> <p>sigs@discuss.folio.org - Core to the FOLIO community is its Special Interest Groups (SIGs). Each SIG has a category under this category for its discussions.</p> <p>■ Internationalization ■ Metadata Management ■ Resource Access                  ■ Resource Management ■ Task Workflows                  ■ User Interface / User Experience ■ User Management</p>	34

Latest	
<p>Welcome to the FOLIO Discussion Site</p> <p>■ Site Feedback</p>	2 16d
<p>UX Sketches: Resource Management—First Drafts</p> <p>■ Resource Management ux-sketches, ux, resource-management</p>	2 1d
<p>Calendar of FOLIO Meetings and Events now available</p> <p>■ Community</p>	0 5d
<p>F</p> <p>How to create *.raml and *.schema in RMB?</p>	4 13d
<p>F</p> <p>How to understand “we create a JSON structure of a moduleDescriptor and POST it to Okapi”?</p>	19 13d
<p>F</p> <p>Raml-module-builder RMB question : I can't see nothing after operate java -jar mod-configuration-fat.jar via browser</p> <p>■ Software</p>	4 14d
<p>2017-03-10 Internationalization SIG Meeting Invitation and Agenda</p> <p>■ Internationalization</p>	1 15d

Pages

# Welcome to the FOLIO Wiki

Created by Peter Murray, last modified on Mar 24, 2017

This site holds documentation about the FOLIO project in general and the work of the Special Interest Groups. For more information about the folio project, see <https://www.folio.org/> that same username and password here.

## Important Documents

- [Calendar of FOLIO Meetings and Events](#)
- [FOLIO Roadmap](#)
- [Community Resources](#)
- [FOLIO Graphics and Branding Resources](#)

## FOLIO Product Council

The [FOLIO Product Council](#), also called the SIG of SIGS, will act on behalf of the OLE Community and FOLIO partners to express and champion priorities in the development of the FOLIO Library Service Platform, and ensure the relevance and cohesiveness of the FOLIO project.

## Special Interest Groups

A Special Interest Group (SIG) consists of practitioners from libraries and services providers that are interested in contributing to a specific functional area of the FOLIO platform. The currently active SIGs are:

- [Metadata Management](#)
- [Resource Management](#)
- [User Management](#)
- [Resource Access](#)
- [Forum Facilitators](#)
- [Internationalization SIG](#)



Roman Piontek

All Threads

CHANNELS (21)



# development

# folio-roundup

# general

# random

# stripes

DIRECT MESSAGES



slackbot

Roman Piontek (you)

## #general

☆ | 👤 274 | 🔒 0 | Community-wide announcements and work-based matters

# #general

Christopher Spalding created this channel on June 7th, 2016. This is the #general channel. Purpose: *This channel is for team-wide communication and announcements. All team members are in this channel.* ([edit](#))

+ Add an app or custom integration    👤 Invite others to this channel

🔍 Your team has more than 10,000 messages in its archive, so although there are older messages than are shown below, you can't see them. [Find out more about upgrading your team.](#)

February 27th



**Péter Király** 10:25 AM

Is there an online demo of Folio?



**Peter Murray** 3:22 PM

Hi, @pkiraly -- There is not an online demo of FOLIO yet. There is a vagrant box that can be downloaded and run [org/folio-ansible#quick-start](https://github.com/folio-org/folio-ansible#quick-start)

github.com

[GitHub - folio-org/folio-ansible: Ansible playbook for FOLIO](https://github.com/folio-org/folio-ansible)

folio-ansible - Ansible playbook for FOLIO

## Index Data Staff Offer a Primer on the FOLIO Code

by Peter Murray on 2016/09/28

Coinciding with the public release of the FOLIO code repositories, Index Data staff offered a primer to developers on the context around how the FOLIO platform provides integration points for module development through the Okapi layer and what that means for developing modules in FOLIO. In the 90 minute presentation (embedded below), Peter Murray (open source community advocate) and Jakub Skoczen (architect and developer) walk through how the pieces come together at a high level, and Kurt Nordstrom (software engineer) demonstrated how to build a back-end module for Okapi using NodeJS.



### NEWS

Index Data at ACRL 2017, March 22 - 25, in Baltimore, MD  
*Posted on 2017/03/21*

Index Data at the ER&L Conference, Austin, TX and Online -- April 2-5, 2017  
*Posted on 2017/03/20*

Index Data at 2017 Code4Lib Conference in Los Angeles, March 6 - 9  
*Posted on 2017/03/06*

[MORE NEWS...](#)

### BLOG

RA21 Project aims to ease remote access to licensed content  
*Posted on 2016/12/19*

Index Data Staff Offer a Primer on the FOLIO Code  
*Posted on 2016/09/28*

Mike Taylor is off to Brussels to chat about The One Repo  
*Posted on 2015/11/10*

[MORE POSTS...](#)



# Source Code

The FOLIO platform consists of both server-side and client-side components, and will grow to include library services that run on the platform as modules. Some sample modules are located in [folio-sample-modules](#).

Several repositories in the [folio-org GitHub organization](#) host the core project code. Third-party modules may be hosted elsewhere.

A good starting point for understanding the FOLIO code is [Okapi](#) – specifically the [Okapi Guide and Reference](#), which introduces the concepts and architecture of the FOLIO platform, and includes installation instructions and examples. Okapi is the central hub for applications running on the FOLIO platform and enables access to other modules in the architecture.

The FOLIO system is made up of the code in several GitHub repositories. Each repository contains the code for a single well-defined element of the system. These repositories fall into three categories:

- *server-side elements* that provide services and the infrastructure that they run on;
- *client-side elements* that provide a framework for using those services from a Web browser;
- and a few that fall into neither of these categories.

**PLEASE NOTE** that this is a technology preview following the [release early, release often](#) philosophy. **We want your feedback** in the form of pull requests and filed issues and general discussion via the [collaboration tools](#).



# FOLIO

FOLIO is a new open source, cloud hostable, app-store based library platform, designed to facilitate collaboration between disparate development teams.

<http://dev.folio.org/> [information@folio.org](mailto:information@folio.org)

## Repositories

People 0

Search repositories...

Type: All

Language: All

### cql2pgjson-java

CQL to PostgreSQL JSON converter

Java Updated 28 minutes ago



### ui-users

Stripes UI module: administrating users

JavaScript 1 Updated 2 hours ago



### stripes-connect

Declarative REST data access for React components, part of the FOLIO project

JavaScript 2 Updated 5 hours ago



#### Top languages

- Java
- JavaScript
- Shell
- HTML
- C

#### People

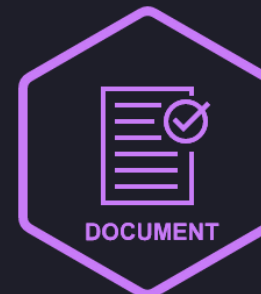
0 >

This organization has no public members. You must be a member to see who's a part of this organization.

# The simplest way to design APIs

RESTful API Modeling Language (RAML) makes it easy to manage the whole API lifecycle from design to sharing. It's concise - you only write what you need to define - and reusable. It is machine readable API design that is *actually* human friendly.

Write once. Use many. Creative laziness encouraged.



# #FOLIOBuilds

← #FOLIOBuilds

OP LATEST PEOPLE PHOTOS VIDEO

**NAU Library** @NAULibrary · 5d  
First FOLIO app I'd like to see?  
Renewals for checkouts!  
[#FOLIOBuilds](#)

**FOLIO-Open Libraries** @FOLIO... · 5d  
FOLIO is hosting a panel at [#ALAMW17](#). Register here to attend: [bit.ly/2igIPYW](#) and learn more about [#FOLIOBuilds](#).

**Tiago Murakami** @trmurakami · 5d  
We want a module for management electronic subscription [#FOLIOBuilds](#)

Richard Burkitt liked

**Chad Smith** @techsmitty · 5d  
I'll be building the VR experience...  
Folio using metaphors from M...  
Report and the JEDI library

← #FOLIOBuilds

OP LATEST PEOPLE PHOTOS VIDEO

**FOLIO-Open Libraries** ... · 29 Dec 16  
Let's talk about what [#FOLIOBuilds](#).  
Learn more: [bit.ly/2htGDQ1](#)  
[#ALAMW17](#)

**FOLIO-Open Libraries** ... · 28 Dec 16  
What excites you about FOLIO?  
Answer the survey question here:  
[svy.mk/2ihQycD](#) and we'll share your responses. [#FOLIOBuilds](#)

**Elizabeth Hoover de** @L... · 22 Dec 16  
I want an app for individuals in our institution & community to catalog themselves--social media for the library catalog [#FOLIOBuilds](#)

Want to subscribe to these cards?

[Sign up for free](#)


or

## Events ⊕ Public

### Learn about FOLIO at these events worldwide

We look forward to seeing you at these events worldwide. Click on "Calendar" on the top right for the calendar view. Click on any card for event details.

 Orange label = webinar

 Green label = conference

 Blue label = FOLIO Day meetup

### Webinars



The "Kabalog" | Wednesday, March 29, 2017 at 11:00AM EST / 1600 GMT

☰ 1

### North America



Computers in Libraries, Arlington VA, March 28-30, 2017

☰ 1



Electronic Resources and Libraries (ER&L) | Austin, TX | April 2-5, 2017

☰ 5



CNI Spring 2017 Membership Meeting | Albuquerque, NM | Apr 3-4, 2017

☰ 1

### Latin America

**Deutschsprachiges Treffen:**

**Stuttgart, Herbst 2017  
(derzeit beginnende Planungsphase)**

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>  
dev. , discuss. , events. , wiki.

Herzlichen Dank!

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