



**Cornell**UniversityLibrary

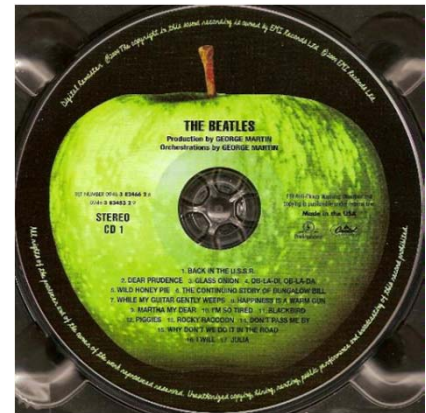
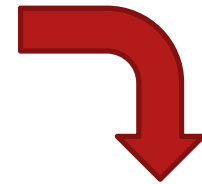
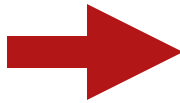
# The (Actual) Next Generation of LMSs

Peter McCracken  
Electronic Resources Librarian  
Cornell University





# Library Revolutions

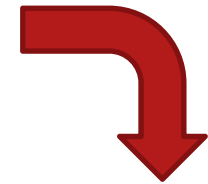
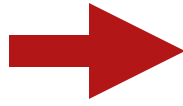
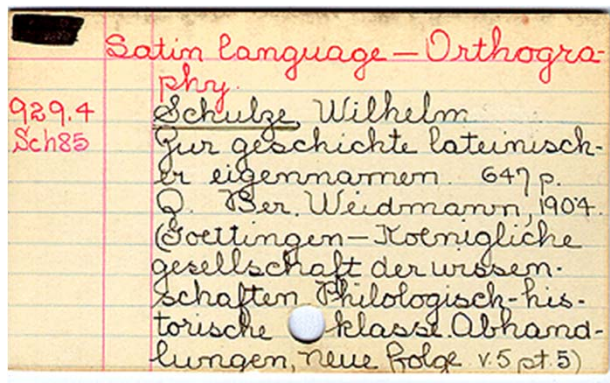


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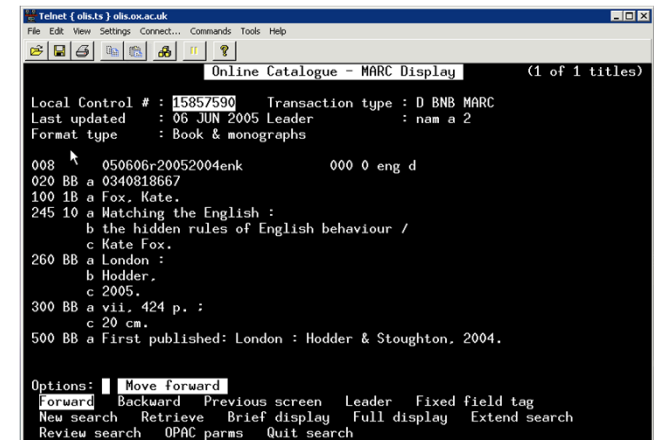
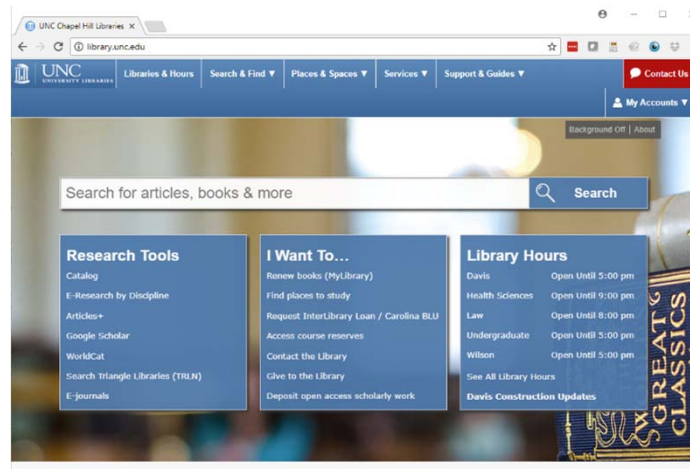
Cylinder: Norman Bruderhofer, [www.cylinder.de](http://www.cylinder.de), CC BY-SA 3.0, <https://commons.wikimedia.org/w/index.php?curid=427395>  
 LP: Available for \$75 on eBay, through yesterday.



# Library Revolutions



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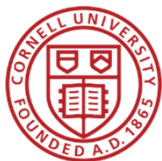
# Library Revolutions

- 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



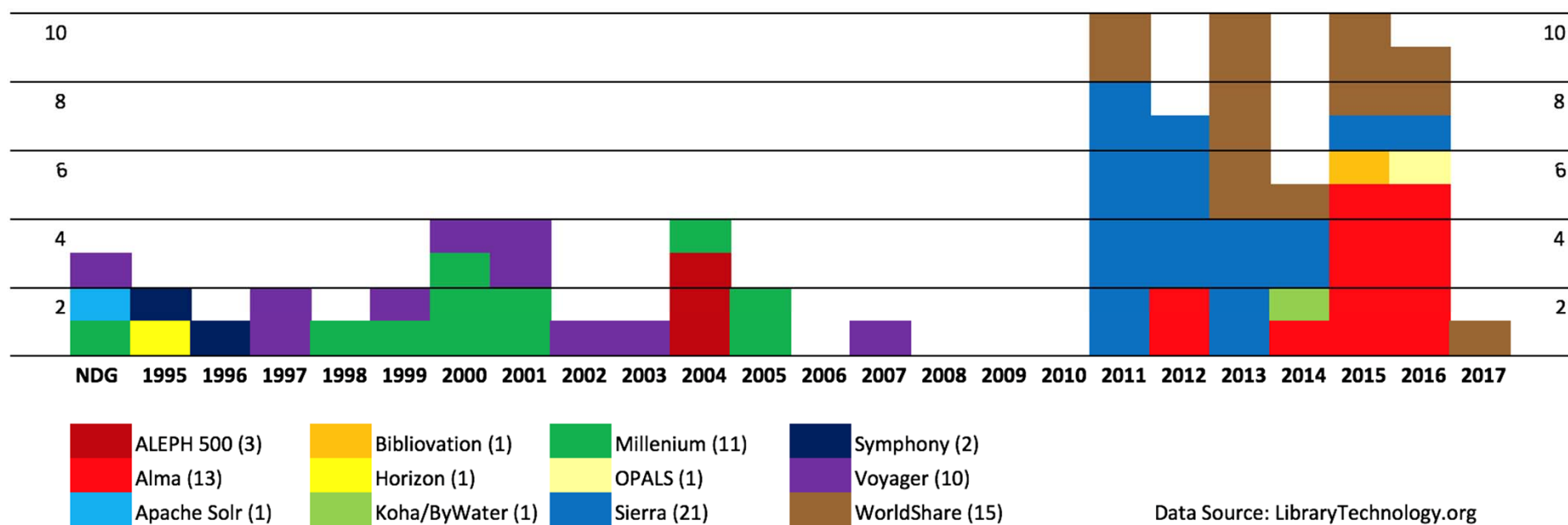
## Electronic vs. Print

- 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

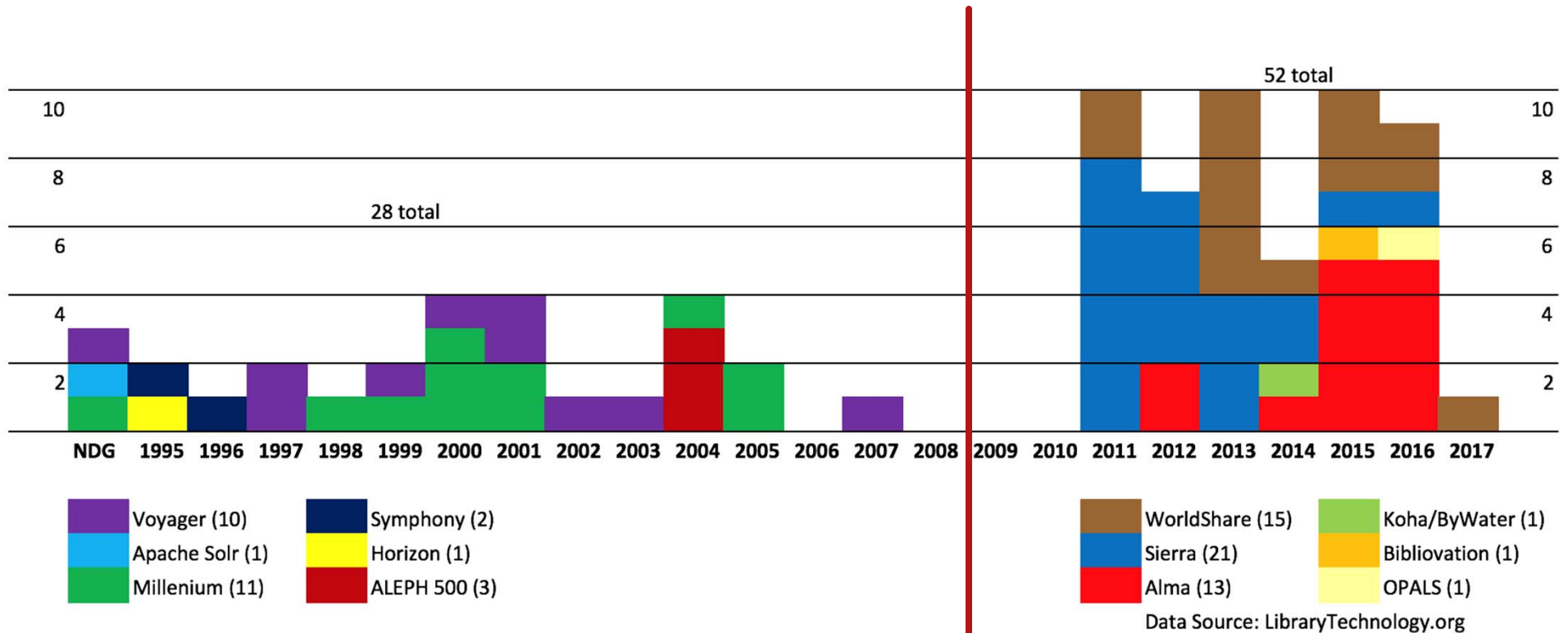
Automation System Installations, by Type and Year, Oberlin Group Libraries (n=80)





# Automation Installs, Oberlin Group

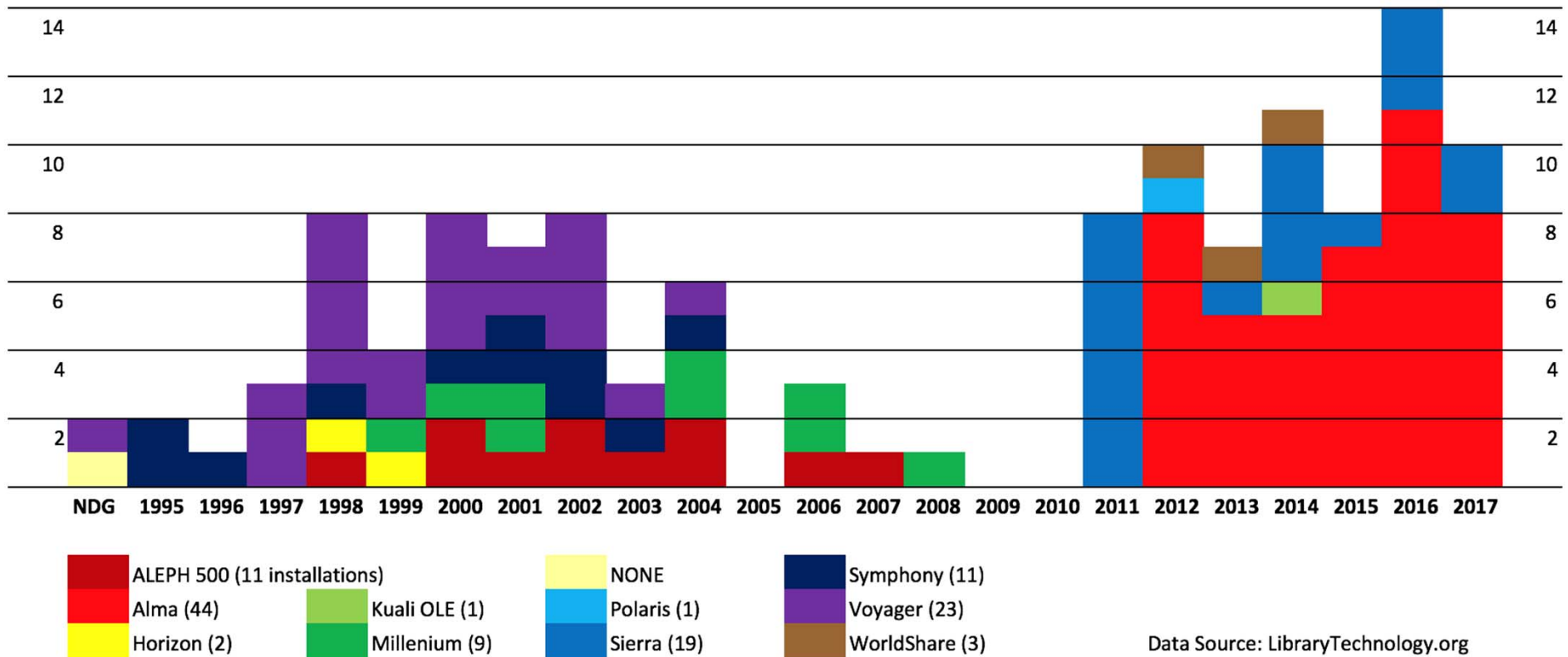
Automation System Installations, by Type and Year, Oberlin Group Libraries (n=80)





# Automation Installs, ARL Members

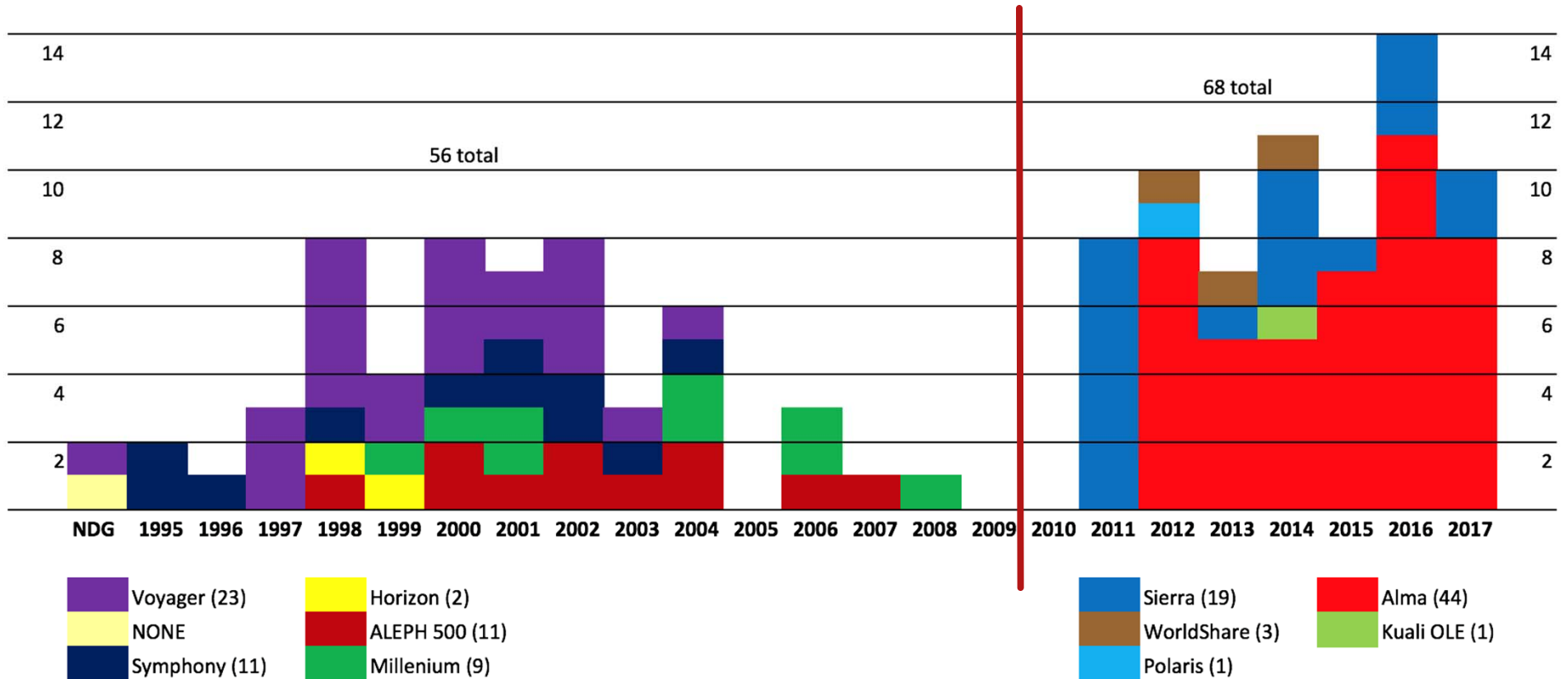
Automation System Installations, by Type and Year, ARL Libraries (n=125)





# Automation Installs, ARL Members

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

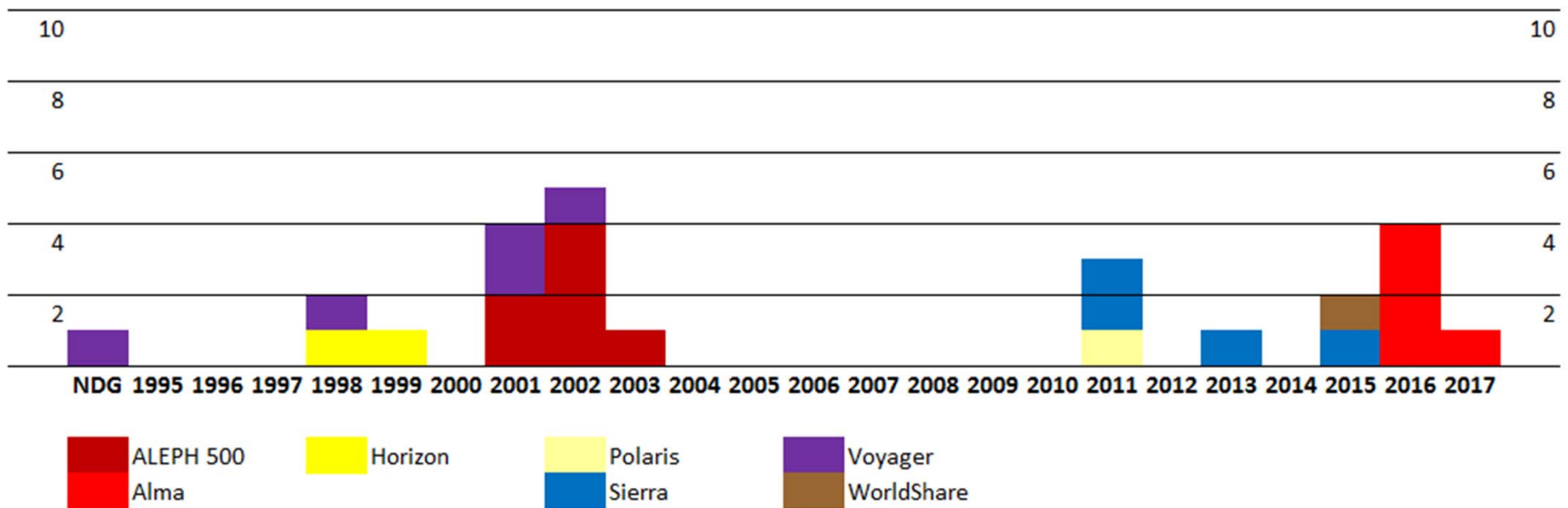


Data Source: LibraryTechnology.org



# 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



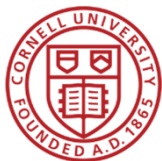
## FOLIO: How It's Being Built

- Librarian-led and -advised Special Interest Groups (SIGs)
- Completely open development
  - [discuss.folio.org](http://discuss.folio.org)
  - [ux.folio.org](http://ux.folio.org)
  - [www.folio.org](http://www.folio.org)
- Open FOLIO slack channels
- Approx 14 yrs' worth of meetings recorded; available to anyone



## Cornell Overview

- University: 22,00 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



## Cornell Situation



- 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

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



# FOLIO In Action

[FOLIO Demo Site](#)

[FOLIO Prototypes](#)

[FOLIO Welcome](#)



## FOLIO Marketplace: An Innovation Platform

- 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



## Future of FOLIO & LMSs

- If FOLIO succeeds, it could introduce a whole new way of managing library services
- Fantastic group of organizations and institutions
- Community, community, community





# Future of FOLIO

- 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

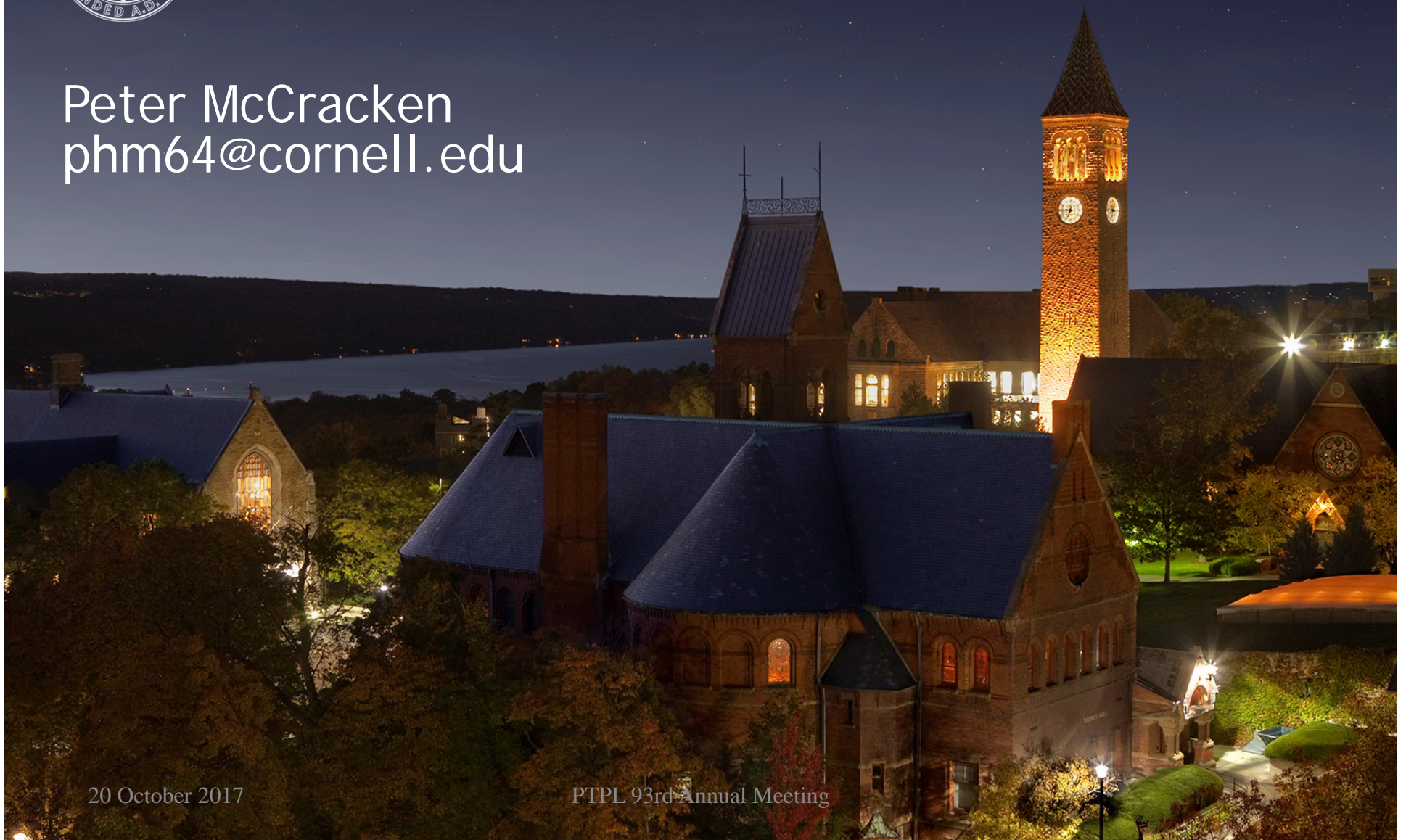
# FOLIO





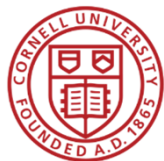
**Cornell**UniversityLibrary

Peter McCracken  
phm64@cornell.edu



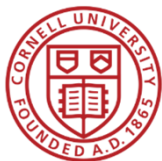
20 October 2017

PTPL 93rd Annual Meeting



# Cornell Principles

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



# FOLIO At Cornell: Countdown

Cornell University

Confluence
Dashboard Spaces People Create

OLE-FOLIO Implementation ☆

Pages Blog

PAGE TREE

- > Groups
- > Meeting Notes - CUL Team
- > Other Sub-Sections
- > Project Documents
- > Project Management Plan
- > ZZZ OLD OLE Wiki Pages

Space tools <<

Pages

## OLE-FOLIO Implementation Project

Created by Confluence Administrator IV, last modified by Holly L. Mistlebauer 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 Koltay (Marketing)
- Deb Lamb (Public Services)
- Alan McCarty (DevOps)
- Peter McCracken (Technical Services)
- Chris Manly (Information Technology)
- Holly Mistlebauer (Project Leader)
- Kizer Walker (Collection Development)
- Melissa Wallace (Accessibility)
- Frances Webb (Developer)

[Extended Team Member List](#)

# FOLIO

The Future of Libraries is Open

### Countdown to Implementation

6

1

9

Days

### Search Wiki

### 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