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future of libraries is open

Open Source, Community Development and Libraries From KUALI OLE to FOLIO at Lehigh University
开源、社群开发与图书馆：从**Kuali-OLE到FOLIO**

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美国理海大学图书馆获取服务部门主任 **Sharon Wiles-Young**

LEHIGH UNIVERSITY

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Outline 大纲

- Lehigh University facts 关于美国理海大学
- Open Source commitment- library system Kuali OLE 开源的承诺
- What learned from open source development during Kuali OLE project Kuali OLE项目从开源开发中学到了什么
- FOLIO open source development-What is different? FOLIO 项目有何不同？
- What is the reality of FOLIO and roadmap for implementation FOLIO 的实现与发展路线图的实际情况是什么
- What are Lehigh's expectations and aspirations for FOLIO
  - Examples of community development in FOLIO 理海大学对FOLIO的期望和抱负是什么。在FOLIO中社区发展的例子

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Greetings from Cornell and Lehigh University
来自康奈尔大学和理海大学的问候

Cornell

Lehighh

Fairchild-Martindale Library

Linderman Library

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Lehigh University: Some Quick Facts

Acad

Undergraduate Students: 5020
本科生
Graduate Students: 2000
研究生

Library and Technology Services
图书馆及科技服务:
Merged organization Libraries and
Academic and Administrative Computing
work together on teams

ILS Database size 数据量:1,081,417

Vendor based Integrated Library System
- SIRSI migrated to open source Kuali
OLE in August 2014 由厂商服务的图书馆
系统转为开源的 Kuali OLE 系统

MOVE TO OPEN SOURCE DEVELOPMENT

转向开源开发

Why Lehigh?

为何这么做？

- Merged Organization 组织合并
- Risk takers in using new technologies and designing new services 使用新技术和设计新服务的风险承担者
- Support community development & development led by subject experts in libraries 支持社区开发和由图书馆学科专家领导的开发
- Move away from ILS to Library Service Platform 面向**LSP**
  - Allow to develop apps
- Open source commitments 开源的承诺

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ILS and Open Source: Why 图书馆系统与开源。为何?

VuFind at Lehigh

- Open source software 开源软件

- Community source code- worked with others in the VuFInd community to develop features
与**VuFInd**社区中的其他人一起开发功能

- Discovery layer used by Lehigh 资源发现层

    Used VuFInd as discovery layer with vendor ILS

    Migrated to Kuali OLE continued to use VuFind

Achievements with code 代码开发成就

- API
  - OLE API - update ILL requests to received 更新馆际合作请求

- Global Edit of data 数据的全局编辑
  - Create alerts in Circulation based on item types 依据馆藏类型产生流通模快的通知
  - Staff can work on large files - pull files from OLE database into MarcEdit/OpenRefine 批量编辑与更新数据库的MARC数据

- SQL queries for reporting 用于产生报告的SQL查询
  - Budget and PO for reporting- automated reports 预算和采购订单的自动化报告
  - ILL Borrow Data and circulation data 馆际合作借用数据和流通数据

FOLIO

Data Accessibility and Where is your Libraries' Data??
数据可访问性和您的图书馆的数据在哪里**??**

Taking control of your library's data: A WorldShare Report Designer demonstration

Wednesday, July 31 at 2:00 pm, ET

Join this 30-minute demonstration to see how WorldShare Report Designer uses your data in WorldShare Management Services to enable you to create custom reports, charts, and data visualizations. During this demonstration you'll

- see how your WMS data is pulled automatically, so you don't have to pull and align data in multiple formats from different systems;
- learn how the easy-to-use Web Intelligence interface saves you time;
- discover how the data is organized in logical, familiar categories, making custom report-building easy; and
- explore how you can take advantage of existing reports and modify them to fit your local needs.

Register now

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Library Data from Kuali OLE informing Book Purchasing
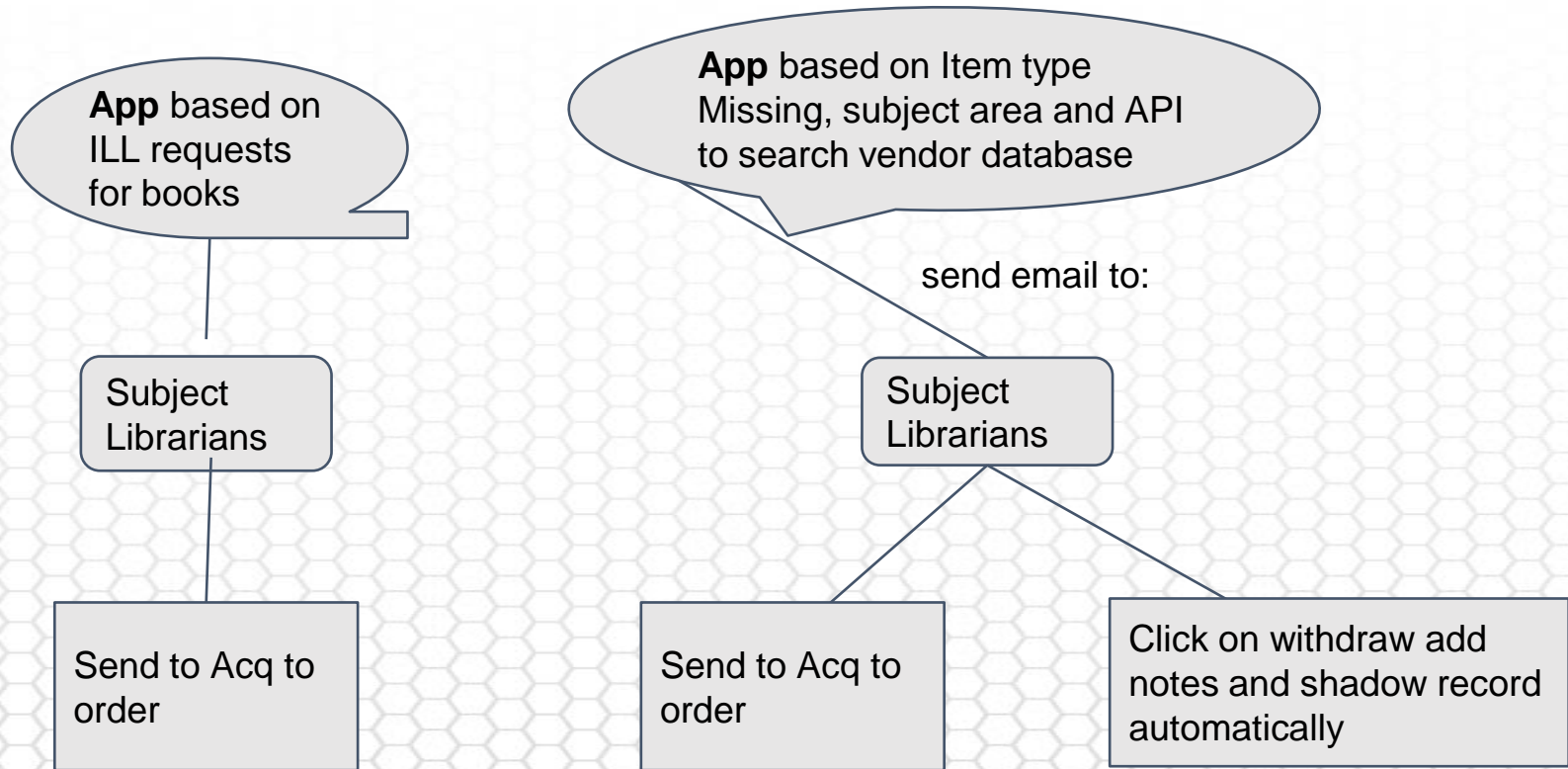## 由 Kuali OLE 自动取得图书馆数据并通知图书采购

PALCI REQUEST (LEH-11318958)	CRAZY - A FATHER'S SEARCH THROUGH AN	2019-08-01 12:44:22.0	College of Engineering	UGRAD
PALCI REQUEST (LEH-11067431)	CRAZY - A FATHER'S SEARCH THROUGH AN	2017-11-30 16:18:00.0	College of Engineering	GRAD
PALCI REQUEST (LEH-11017172)	CRAZY - A FATHER'S SEARCH THROUGH AN	2017-08-29 14:49:51.0	College of Engineering	GRAD
PALCI REQUEST (LEH-10893450)	CRAZY - A FATHER'S SEARCH THROUGH AN	2016-10-28 16:24:02.0	College of Arts & Sciences	UGRAD
PALCI REQUEST (LEH-10855192)	CRAZY - A FATHER'S SEARCH THROUGH AN	2016-08-23 13:24:16.0	College of Engineering	GRAD
PALCI REQUEST (LEH-11284994)	BORN A CRIME - STORIES FROM A SOUTH A	2019-04-03 15:14:27.0	College of Arts & Sciences	UGRAD
PALCI REQUEST (LEH-11245768)	BORN A CRIME - STORIES FROM A SOUTH A	2019-01-25 12:59:57.0	College of Arts & Sciences	GRAD
PALCI REQUEST (LEH-11171619)	BORN A CRIME - STORIES FROM A SOUTH A	2018-08-22 13:51:03.0	College of Business & Economics	UGRAD
PALCI REQUEST (LEH-11101663)	BORN A CRIME - STORIES FROM A SOUTH A	2018-02-08 16:19:02.0	College of Engineering	UGRAD
PALCI REQUEST (LEH-11093725)	BORN A CRIME - STORIES FROM A SOUTH A	2018-02-01 16:23:33.0	College of Business & Economics	UGRAD

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App based on ILL requests for books

App based on Item type Missing, subject area and API to search vendor database

send email to:

Subject Librarians

Subject Librarians

Send to Acq to order

Send to Acq to order

Click on withdraw add notes and shadow record automatically

localhost:8098/login

WAYFINDER

On Your MARC   Workflows ∨   Blog ∨   More ∨

Logout

Patron Requests

+ New Request   ⟳ Refresh

Status	Count
Patron Requested ⚠	6
Librarian Review ⚠	1
Item Ordered ⚠	1
Request Canceled ⚠	1

USER or Patron Database--Webservices from Universities' Oracle ID Management Database to Kuali OLE
用户或读者数据库—从大学的**Oracle ID**管理数据库到**Kuali OLE**的网络服务

Patron

Expand All | Collapse All

Create Bill   **View Bills**

▾ Overview

Patron Id: 301779	Barcode: 803880985	Patron Type: STAFF	Patron PhotoGraph:
Activation Date: 07/01/2014	Expiration Date:	Source: Lehigh Identity Management	
Statistical Category:	Active: true		

▾ Contacts

▾ Name

Name Type: Title: Ms.   First Name: Sharon   Middle Name: Last Name: Wiles-Young   Suffix: Default: true   Active: true

▾ Address

Show 10 ▾ entries

csv | xml | xls

Address Type	Line 1	Line 2	Line 3	City	State	Postal Code	Country	Address Source	Address Verified	Deliver Address	Begin Date	End Date	Default	active
Campus	30 - Linderman Library								true	false			true	true
Home	730 Thirteenth Avenue			Bethlehem	PA	18018			true	false			false	true

Showing 1 to 2 of 2 entries

First | Previous | 1 | Next | Last

FOLIO Community Development: EBSCO, Index Data and Libraries

FOLIO 社区发展: EBSCO, Index Data与图书馆

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OCT 2019

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Lehigh FOLIO team 理海大学 **FOLIO** 团队

- Subject Matter Experts 主题专家
  - **Mark Canney** Resource Access SIG 资源访问**SIG**
  - **Lisa McColl** Metadata Management SIG- subgroup work and testing 元数据管理**SIG**
  - **Doreen Herold** Reporting SIG 报告**SIG**
  - **Dan Huang** Testing for Resource Management 资源管理**SIG**
  - **Sharon Wiles-Young** Product Council member 产品委员会
- Technology team 技术团队
  - **Chris Creswell**- Sys Ops SIG and Data Migration & Kuali/OLE implementers group 系统运维, 数据迁移, **Kuali/OLE** 实施
  - **Chulin Meng**- Implementers SIG 实施**SIG**
  - **Michelle Suranofsky**- Users App and NCIP developer 用户**App**和**NCIP**开发人员

FOLIO

Standardized XML request & response messages

标准化的XML请求和响应信息

Use Case 用例:

Interlibrary-loan

Checkout Item

```
<?xml version="1.0" encoding="UTF-8"?>
<NCIPMessage v:version="5.6" xmlns:v="http://www.niso.org/2008/ncip" xmlns="http://www.niso.org/2008/ncip" xmlns:xsi="http://www.w3.org/2001
    /XMLSchema-instance" xsi:schemaLocation="http://www.niso.org/2008/ncip http://www.niso.org/schemas/ncip/v2_0/ncip_v2_0.xsd ">
  <CheckOutItem>
    <InitiationHeader>
      <FromAgencyId>
        <AgencyId>Relais</AgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <AgencyId>Lehigh University</AgencyId>
      </ToAgencyId>
    </InitiationHeader>
    <UserId>
      <AgencyId>LEHI</AgencyId>
      <UserIdentifierValue>32155763383</UserIdentifierValue>
    </UserId>
    <ItemId>
      <AgencyId>LEHI</AgencyId>
      <ItemIdentifierValue>LEH-201908221054</ItemIdentifierValue>
    </ItemId>
  </CheckOutItem>
</NCIPMessage>
```

FOLIO

FOLIO Development Highlights
FOLIO 開发亮点

- ERM development happening along with Acquisitions app **ERM** 与采购 **App**一起开发
  - E-Usage App 电子资源使用统计 **App**
  - Organizations and Vendor records 组织和供应商记录
  - licensing and package management 授权许可和资源包管理
- Roadmap Q3 highlights 第三季开发重点
  - Working on invoicing 进行发票模快的开发
  - Advance features for circulation- patron requests 流通模快的高级功能 – 读者请求
  - NCIP and other integrations **NCIP**与其他集成
- Automated testing 自动化测试
  - Librarian experts starting to manually test functionality and develop more test cases
- Others starting to contribute code- Community coding 其他人开始贡献代码——社区代码
  - Community developers; Lehigh developer writing the NCIP coding and contributing that code, others coding Course reserves/ book lists and e-usage app 理海开发者贡献**NCIP**代码，其他开发者也贡献如课程保留书单和电子资源使用统计 **App**
- UX/UI focused example: 用户体验与用户介面的聚焦案例

FOLIO

User interface with Kuali - OLE
Kuali - OLE 的用户介面
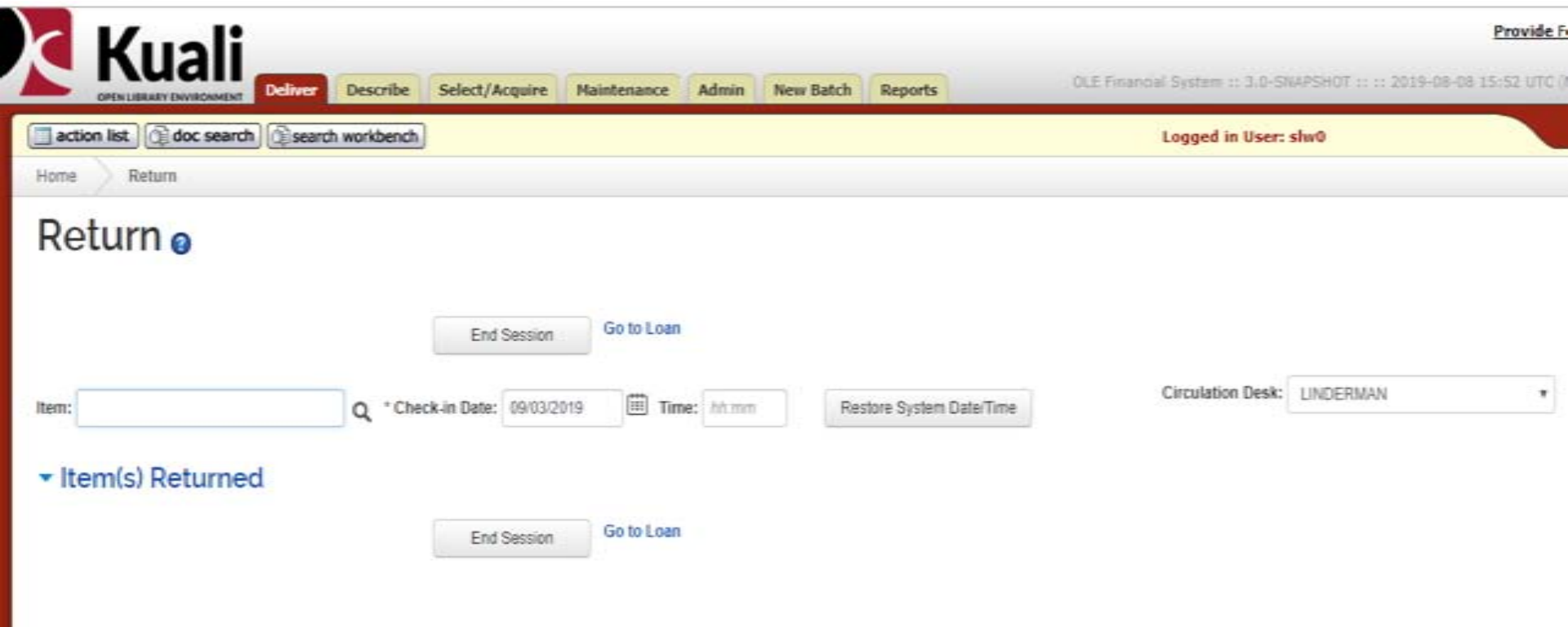
User interface of FOLIO
FOLIO的用户介面
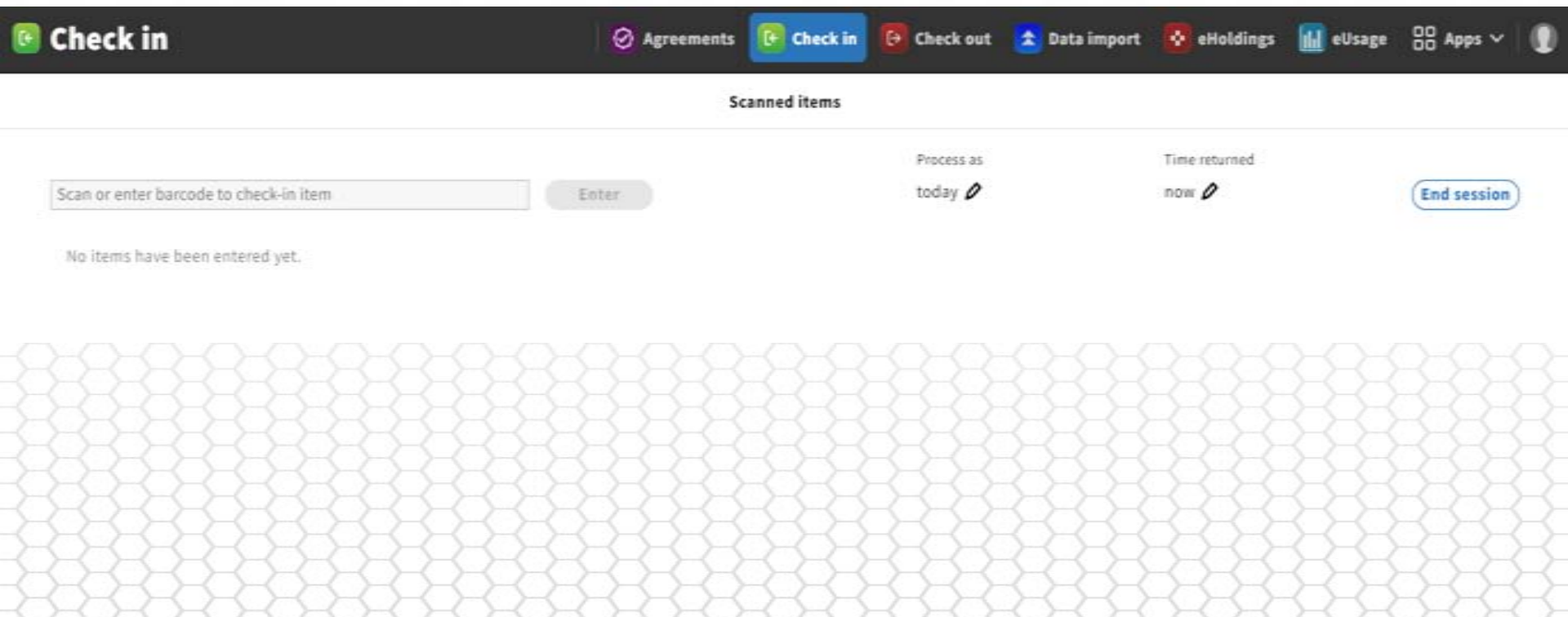
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The FOLIO team (Lisa Sjögren to the left) and staff at Chalmers Library testing the system. Photo: Ellen Åberg.

Chalmers first in the world with a new unique library system

FOLIO

FOLIO Q4 release FOLIO 第四季度发布版本
December 2019

- Q4 development will focus on features for the next early implementers going into production with full features/apps
- **Q4** 的开发将关注下一梯次早期实现者的特性，这些实现者将使用完整的特性/应用程序投入生产
  - Performance testing 性能测试
  - Test integrations 测试集成
  - Metadata export and migration tools 元数据导出和迁移工具
  - Need to test TestRail 需要测试 **TestRail**

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Lehigh planning to implement with Q4 2019 or Q1 2020
Lehigh计划在2019年第四季度或2020年第一季度实施

- Test database up and running at Lehigh with Q3 loaded 测试数据库运行
- Testing migration of Lehigh data 测试**Lehigh**数据的迁移
  - Asking staff to test and review data 要求员工测试和检查数据
- Lehigh implementation of FOLIO will be hosted in the AWS cloud 将托管在 **AWS**云中
- Lehigh will implement all apps beginning with Inventory, circulation and acquisitions and ending with ERM functionality 将实现所有应用程序，从库存,流通和采购开始, 最后是**ERM**功能
  - ERM last because running another system Coral **ERM**放最后是因为目前使用**Coral**
  - analysis of use of eholdings and inventory 电子馆藏**App** 和 典藏**App**的使用分析
- Migration Lehigh's metadata into inventory and currently loading some organization/vendor data for acquisitions use 元数据迁移到 典藏**App** 中，并加载一些组织/供应商数据以供采购模快使用

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Inventory data 典藏数据

Organizations/Vendor Data 组织和供应商数据

Aspirations for FOLIO at Lehigh 对FOLIO的渴望

- Use of tags and workflows 标记与工作流的使用
- Services for faculty, staff and students-requests and notifications 为教员、职员和学生提供的服务——请求和通知
- ERM- eUsage and cost relationships- trials and license negotiations ERM 电子资源使用和成本之关系-试用和许可谈判
  - Stop entering electronic resources in other software- CORAL,spreadsheets 停止在其他软件输入电子资源 – 如**Coral**和表格
- Use multi-tenant for consortium catalog and plans to centralize and assist other libraries with ordering or metadata processing 使用多租户联合目录，并计划集中和帮助其他图书馆进行采购或元数据处理
- More integration with University systems example 更多与大学系统集成的例子
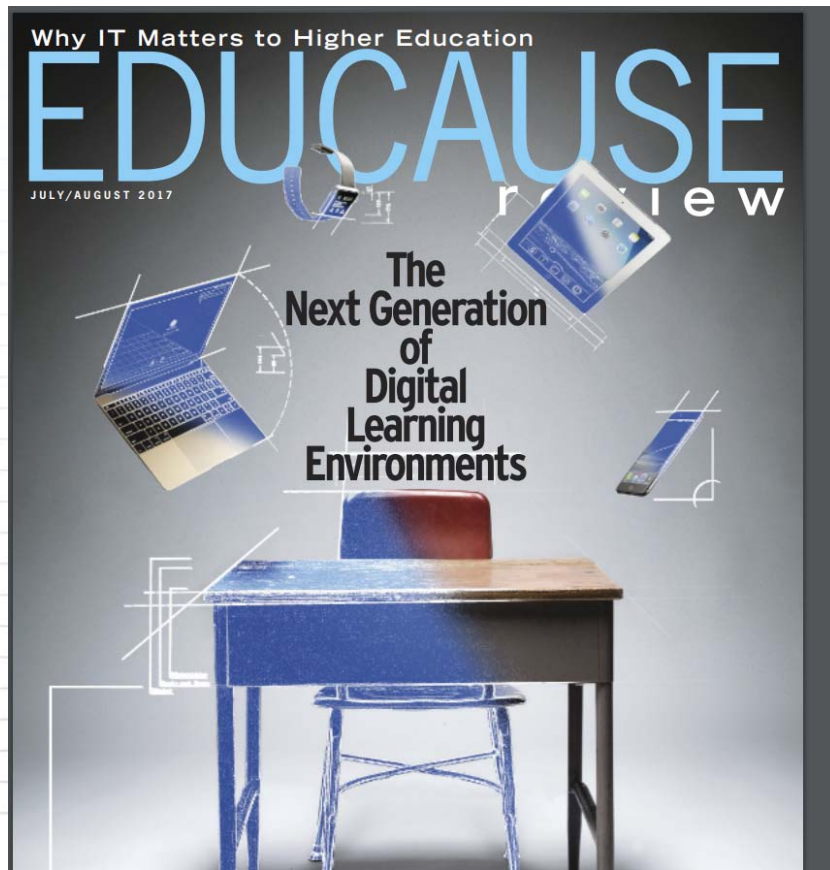
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未来:下一代的系统和社区
开发设计的系统

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FOLIO
The Future of Libraries is Open

THANK YOU 谢谢您

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