

**Theme:** Shanghai library FOLIO project

**Time:** June 22, 2021 07:00pm (EST) / June 23, 2021 07:00am (GMT+8)

**Attendees:**

Vincent Bateau (Enterprise Architect, EBSCO)

Gang Zhou (Project manager, Shanghai library)

Sha Jiang (Technical Director, Jiata)

Lucy Liu (Product Owner, Folio China)

**Notes:**

1. [Course Reserves - LTI connectivity](#)

**Vince:**

- Folio has the ability to create course reserves within the project, which means that librarians can create the definitions of the courses. They can create courses within the time range, i.e. this course is going to be for this semester. They can define instructors on the course. The instructors might be represented as users in folio. The whole point of this is that you can now assign items in your catalog to be available for that course. So that effectively creates a course reserve, which will prevent the item from being lent out to the general population. That is the first part on the folio side. It is represented by mod-courses on the backend and ui-courses on the frontend.
- There's a second piece, which is an integration piece, that allows the course definitions to be integrated with a learning management system (LMS) using the LTI protocol. It allows an external system, which is where the students will be taking their online courses usually, to be connected with the resources that are made available through the catalog. And it does this by calling the edge API that is created for that purpose. It will look up the title information. And it will expose the information about that course reserve in the appropriate course if it matches the course and potentially even offer it a direct link for the student to consume the resource if it's an online resource, for example.
- That's basically the functionality you have. You can model your courses on the Folio side. And you can make them connected and synchronized with the actual courses that are being delivered in the LMS. That second piece is available through two modules: there's an edge API, that supports the LTI protocol, which is providing all kinds of activities that the external system is connected to. And the second piece which is ui-lti-courses. Its purpose is to basically manage the configuration of the external integration. It's not really a user interface.
- At this point, those are the modules that are available, the development of which was driven in large part by Duke University, a member institution of Folio. At this point, their development is complete in the sense of the working system. They have some other ideas and maybe some further improvements that they want to do and a few defects. But for the most part, there is no current active plan to do anything else other than maybe in the future when the resources are available to

develop against it.

**Sha Jiang:** So students can search courses in LMS such as Canvas and get references for these courses from Folio. Is this correct?

**Vince:** Yes. The course definition in Folio is made to match the identifier of the course in the LMS. When the LMS checks by polling the LTI edge in this case, it will look up the appropriate titles available in the course reserve. If the title is defined on the Folio side with the URI to get to the electronic resources in particular, then a link can be provided to the user on the LMS side.

**Sha Jiang:** Any function to connect the users in LMS and the users in Folio?

**Vince:** I'm not certain. But I don't think so.

**Sha Jiang:** If the students find the resources on the LMS and want to borrow, should they log in to the Folio system?

**Vince:** The students can't log in to Folio because Folio is designed for librarians. There is the opportunity to create a link as part of the definition of the resource in the course reserve module. That link can be a link to somewhere they might log in, such as an OPAC.

## 2. Restructure of the RM SIG

**Gang Zhou:** The RM SIG will merge with the Acquisition Group. ERM will become a SIG. What's the future of the RM SIG? What's the future of Codex?

**Vince:**

- SIGs: It just means there will be better coordinations. There are a lot of overlaps in their subject domain.
- Codex: Codex is not currently actively being developed in the platform. We only ever implemented the Codex Search part of Codex. Codex Search was dropped from the last release. It's not really been developed further. ElasticSearch can be used in a similar fashion and can solve similar problems.

## 3. Project updates from Shanghai Library

**Gang Zhou:** We launched check-out in the closed stack in April. We plan to launch check-in and request in the closed stack at the end of June or later.

**Vince:** How can people return books?

**Gang Zhou:** They return books to the Horizon system.