**Theme**: Shanghai library FOLIO project

**Time**: January 4, 2022 07:00pm (EST) / January 5, 2022 08:00am (GMT+8)

**Attendees**:
Vincent Bareau (Enterprise Architect, EBSCO)
Gang Zhou (Project manager, Shanghai library)
Lucy Liu (Product Owner, Folio China)

**Notes:**
1. **SHL Project Updates (Gang Zhou)**
● Shanghai Library East will open April 23, 2022.
● Some other folio apps (ERM, Acquisition, Cataloging, etc.) might go live at SHL.

2. **What suggestions do you have if we implement other apps? (Gang Zhou)**
**Vince**:
● No general suggestions. We can discuss specific concerns as needed.
● These are working applications and modules already in live. There are other institutions using them. I imagine that you will do some testing either in live or using parallel systems. You never know if it works unless you actually use it.

3. **Do we have a timeline for the implementation of other modules? (Lucy)**
**Gang Zhou**: It will be discussed in January.

4. **Are we going to implement one app after another? (Lucy)**
**Gang Zhou**: It's not discussed yet.
**Vince**: Generally speaking, institutions will go live with one of the two configurations: ERM only or full. It is difficult to go live one app at a time because of dependencies. The reason that some libraries go live with ERM only is their old system doesn't do ERM. But they need the ERM functionality before they go full live on folio.

5. **Do you have any updates on the folio roadmap or technical framework for 2022? Anything new? (Gang Zhou)**
**Vince**:
● No specific changes so far. There's relative work, but not completed yet. And it has to be run by the folio community. Councils need to follow certain procedures to work on this.
● The PC also has a roadmap that focuses on feature level things and but doesn't address architectural issues. It's a wish list pending technical viability. And the scheduling of implementation depends on development capacity.

6. **Any updates from the community? (Gang Zhou)**
**Lucy**: The Kiwi release went out right before Christmas. Some statistics and reports have not been available to the public yet. I have been reaching out to some community members to get the statistics and to clarify certain issues about the Kiwi release recently. I will send the leadership

team at SHL a summary tomorrow (or later this week).. I am waiting for some responses to complete the report.

**Vince**: There has been a crisis about security vulnerability with log4j. It's a big deal for us. There have been a number of efforts. There is a fix for Okapi. There will be updated releases of the various modules that might be vulnerable.  All the modules being used should make use of a more recent version of log4j that does not contain the vulnerability. Is this something you also consider on your side?

**Gang Zhou**: Yes. We talked about this issue. When will this bug be fixed?

**Vince**: The fix has been implemented with Okapi. There's a latest version of Okapi that is compatible with previous ones, that does not contain the vulnerabilities. I think there's a fix with RMB. The fix has been applied to Kiwi and will be backported to Juniper. It probably won't be backported for Iris.

7. **Quite a few libraries are using the EBSCO hosting services for their ERM implementations. Are they using the standard suite provided by the folio community or the customized ones provided by EBSCO? (Lucy)**
   **Vince**: We are trying hard to provide the same as the release from the folio community. That's pretty much what we offer. The suite we run is mostly the same. We might have one or two apps that  EBSCO is providing to customers that are not part of the folio release because the customers need them.
   **Lucy**: EBSCO China team did a demo of their ERM services in one of the recent Saturday meetings. Did the functionality demoed meet SHL's needs?
   **Gang Zhou**: We have a professional team to evaluate the ERM functions.

8. **Can the ERM apps support multiple KBs? (Gang Zhou) It's an important feature to us.**
   **Vince**:
   ● For the most part, the ERM applications are designed to work with one knowledge base. One installation/tenant of folio is going to be one knowledge base.
   ● There are currently two supported knowledge bases, or maybe three, that are being supported here:
     ○ one is the EBSCO KB in the cloud which interfaces with the eholdings; and
     ○ there is another local knowledge base which has been implemented for German markets. That is a different approach. It's not in the cloud. It attempts to do local harvesting in cashing of contents to local knowledge base.
     ○ There's a configuration option for you to decide to use one or the other. And depending on which one you use, you will have additional features enabled. There are two supported, but you can only use one of them at a time in a given tenant.
   ● If you have two different libraries that need to use two different KBs, you will need two ERM suites, one for each one. I suppose you may have tenant level configurations. But each tenant can only use one KB. Not sure if anyone tried that.