Simultaneous Planning

- Cutover Planning
- Data Migration
- Reporting
- Training & Communication
## Cutover Plan (iterative)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
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<tbody>
<tr>
<td>Stop editing vendor records (addresses, etc.) and load them into FOLIO</td>
<td>June 1</td>
</tr>
<tr>
<td>Stop BorrowDirect and ILL</td>
<td>June 7</td>
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<tr>
<td>Stop new acquisitions</td>
<td>June 14</td>
</tr>
<tr>
<td>Stop adding and updating bibliographic and holdings; including peripheral tasks that change bibliographic and holdings</td>
<td>June 14</td>
</tr>
<tr>
<td>Circulation and requesting stop in Voyager</td>
<td>June 16</td>
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<tr>
<td>LTS stop processing invoices</td>
<td>June 18</td>
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<tr>
<td>Stop adding and updating item data</td>
<td>June 21</td>
</tr>
<tr>
<td>Stop requests</td>
<td>June 21</td>
</tr>
<tr>
<td>Close books in Voyager</td>
<td>June 21</td>
</tr>
<tr>
<td>Stop circulation or use offline circulation</td>
<td>June 21</td>
</tr>
<tr>
<td>Re-open books / go-live in FOLIO</td>
<td>July 1</td>
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<tr>
<td>• Resume all ordering/receiving/serials check-in activities as soon as we have the go ahead from Library Finance and Budget and FOLIO Implementation Team</td>
<td></td>
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Data Migration

- Started clean up and practice runs long before migration
- Worked closely with SMEs in functional areas to make agreements about data
- Relied heavily on EBSCO to expand our data migration staff capacity
Data Go-Live

• Left some data behind - painful but necessary
• Embedded as many Voyager identifiers as we could to maintain relationships and for QA
• Prioritized data that had to be there for go-live, deprioritized some data until after go-live
• Did plenty of clean-up work after go-live
• Data that got less practice had more problems
• Current State:
  – Looking forward to bulk edit to decrease simple API work
Legacy Voyager Data Post-Folio

• Voyager “Snapshot”:
  – A copy of Voyager’s data created in June before go-live
  – to support cross-year reporting, answer questions about the previous state of various records after go-live, etc.

• After Go-Live:
  – Staff submitted requests for Voyager data

• Current State:
  – Voyager Snapshot migrated into LDP and is included in reports
How are you feeling about FOLIO go-live?
Get Involved!

Jump In! Try FOLIO!

Training Opportunities
- Explore Sessions
- FOLIO Fridays
- Demo Days
- Zoom Drop-Ins
- Function-specific Trainings

Communication
- “FOLIO This Week” emails
- #cul-folio Slack channel
- FOLIO Community Wiki, Slack, & SIGs

Jump In! Try FOLIO!