2023-03-21 FOLIO Implementers Meeting Notes

Date
21 Mar 2023

Recording
TK

Attendees
TK

Recommended Resources and Pre-Reads
• ?

Agenda
• Housekeeping
  ◦ Since last we met...
  ◦ Incomplete Actions
  ◦ Douglas College Macros Question (see slack)
  ◦ Future Sessions
• Cutover Processes
  ◦ how long did you pause circulation or ordering or cataloging or other functions?
  ◦ what kind of communication did you do to patrons?
  ◦ did you maintain a view-only instance of your legacy ILS during cutover?
  ◦ Cornell slides
• Closing
  ◦ Any actions or follow through?

Notes

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Michelle: Stanford going live with FOLIO in August, been planning their cutover, want to learn from others how you did it, including: handling patron-facing activities, when to stop cataloging, how/whether to keep legacy ILS available.</td>
<td>Go-live was planned around fiscal year cutover (very complicated to do otherwise).&lt;br&gt;Paused circ for 2 weeks. We let access service people REST before the move. We used offline circulation for a week (app they wrote) (we've shared the code repository)&lt;br&gt;Data left behind: Closed loans, a lot of request data (have to look at legacy data snapshot)&lt;br&gt;Migration of legacy data into LDP 6-7 months after cutover.&lt;br&gt;Couldn't do train-the-trainer because of the pandemic and closed libraries + Iris for testing was delayed → Continual opportunities to get hands-on + continual and varied communication content and channels.</td>
</tr>
<tr>
<td></td>
<td>See Debra’s (Cornell) slides above for their full cutover plan.</td>
<td>How to manage patron expectations - what was communicated?</td>
</tr>
<tr>
<td></td>
<td>Debra: Wrote articles + informed student assembly &amp; faculty senat. Timing: not a lot of students on site, but research is active during summer. We communicated lots.&lt;br&gt;Kathy (Douglas College): Worried about links to course materials breaking, so we will be communicating a lot about that.</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Response</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
</tbody>
</table>
| Heather: planning: EBSCO says: If all data provided Thursday night or Friday, only cutoff 2-3 days, rather than 2-3 weeks. Is that actually doable? | - Size probably makes a difference.  
- Heather (Otis College of Art and Design) - we did over the week-end, but with less than 50,000 items. Timed it for dearest time (1st week August). But we didn't use Acq in our old system.  
- Depends on whether you're self-hosted or not. |
| Heather: Make sure staff is trying out FOLIO, at all levels (and not just that they say they are) - I would have had more trainings. |                                                                                                                                             |
| Did you maintain a view-only version of your legacy system during cutover? | - Shaking heads.  
- Heather: One available to staff, but not to patrons.  
- Kathy: Will keep ours around, just in case, for the few months until the licence ends.  
- Not everyone has that option; any strategies to mitigate that? |
| Darsi: Can anyone describe something that went wrong, and what you did about it? | - Heather: We lost all our authorities (coz of legacy system, not because of FOLIO), now i'm hiring someone to deal with that. |
| How much buffer time to plan in case things go wrong? | - Stanford thinks that data can be migrated in 1 week, but they are asking for a 2 week slot, just in case. |
| How many iterations of test migration before going live? | - Kathy: 2 to 3 times  
- Debra: We did dozens, in chunks (we were very early adopters) (several things in FOLIO had not been built for the scale of Cornell) |
| How were staff involved in testing the migration? | - Debra: Jenn Colt slept, eat and breathed data import for months before, with our hosting provider, iteratively testing the data imports (i.e. EBSCO loading the data).  
- Heather: We had more problems with the FOLIO-EDS - tests there happened many times. |
| Other integrations to consider? A punch-list that people used? | - Debra: We tried all our integrations (we have many).  
- Kathy: We'd love everything to work on our go-live date, but that's not possible, we got to choose, so we're focusing on our basic, bread&butter functions and workflows. |
| How do you sort out, what you can live without? | - Kathy: E.g. we are going live with Nolana; Orchid will give us something we need, but until then we will go back to manual acquisition. We are really involving stuff: “Let's figure out how you can do your job”, “What parts can't work”, “What can we work around”.  
- Kathy: Training is not just about a fuction, but how do you do your job with the functions that FOLIO offers.  
- Tara: That's the life with FOLIO: Adapting around waiting for things you want to be implemented. |
| On the cutover event: What was the communication between you and your hosting providers/ you and the people doing the implementation? | - Debra: It was like mission control (i.e. constant live communication), we had a dedicated private Slack channel with constant communication (20h/day) up until a month afterwards.  
- Heather: With ByWater, they had meetings every other day running up to the event, and emailing. We still have weekly meetings, to check it's all going ok. Soon going to biweekly.  
- Debra: In absence of communication, people make stuff up, so we overcommunicated + don't sugarcoat things that don't work. |

**Action Items**