2019-07-30 Meeting notes

Date
30 Jul 2019

Attendees
- Karen Newbery
- Ian Walls
- Ingolf Kuss
- Jean Pajerek
- Jenn Colt
- Kristen Wilson
- Paula Sullenger
- Patty Wanninger
- Tod Olson
- Kelly Drake
- Steven Bischof
- Ann-Marie Breaux

Goals

Discussion items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Notes</th>
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</thead>
<tbody>
<tr>
<td><a href="https://trello.com/b/ZjscKXK7/folio-implementations">https://trello.com/b/ZjscKXK7/folio-implementations</a> - Review Analysis cards</td>
<td></td>
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<td>Send a note to Ingolf Kuss when you've completed your update.</td>
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<tr>
<td>Prioritize Integrations from spreadsheet</td>
<td>Send a note to Ingolf Kuss when you've completed your update.</td>
<td></td>
<td>Spreadsheets designed to identify gaps.</td>
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<tr>
<td>User Management Documentation Needs - perhaps a start of pieces that need to be included in a documentation template?</td>
<td>Some SIGs have documentation in various places.</td>
<td>Regardless of who writes it, the documentation area of the wiki has been set up, but not used much yet.</td>
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<td></td>
<td>Outline is good, but to actually write the documentation is a ton of work.</td>
<td>Documentation is something the project will likely get someone to help with.</td>
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<td></td>
<td>Missing: Settings, Variables that need to be filled out.</td>
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<td>Individual Apps - Information, Tips, and Tricks - is already built Karen Newbery build a template when a new page is created.</td>
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<td></td>
<td>Folio Forum topic? How to publicize this? Outreach committee?</td>
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<td>Information, Tips &amp; Tricks wasn't designed to be the formal documentation, but a way to park information until we get the formal documentation in place. Wanted to encourage anyone to edit - a community feel.</td>
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<td></td>
<td>A banner, or something on the front page to point people to the IT&amp;T page. Karen Newbery talk to Rachel Fadlon.</td>
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Survey about migration scenarios - "Big Bang" vs. "Trickle" Migration plans

Ingoft, Tod (SysOps SIG)

Do migration APIs need to support overlays? was the question that started this conversation.

Data migration group discussed what the migration scenarios might be. "Big Bang" - full transfer completed during a limited time. "Trickle" - phased migration, migrate partial data, keeping old system running in parallel, reduces downtime. "Trickle" would have more complexity and requirements.

Chicago - last 2 migrations have been "Big Bang" with multiple test runs. Did manual circulation when moving to OLE.

Lehigh - we also plan to do a "Big Bang" migration with multiple test runs leading up to the actual migration day. We also did offline, manual circulation during our migration to OLE and would plan to do so again. This is why it's so important that the process of getting data into FOLIO not take more than a day to complete.

Duke - could go either way, has a script used with OLE migration to continue feeding Aleph data to OLE. Plan to reuse that as much as possible.

Ian - could migrate staff-side only and have a freeze internally, but patrons can still perform actions as they would expect. Later, freeze patrons' use and migrate that data.

FLO - Big Bang. Not planning for incremental or running parallel systems currently. Will clear out ILL loans, don't know yet about holds, but currently thinking about migrating holds, maybe as one type and not mapping hold/request/page/etc.

Tod - Hope is that institutions would do Big Bang and use existing APIs to synchronize data.

Patty - some are talking about bringing up ERM first, which would lead to the Trickle migration. Chalmers

Ingoft - Two GBV libraries and Leipzig plan to migrate to ERM by the end of this year. For GBV, the desired solution is a Trickle Migration: Repeated data loading until the system is complete. FOLIO must be capable of incremental loading for this migration plan. Systems will run in production mode in parallel for a limited amount of time. That's variant 1. If that's not possible, variant 2 is a big bang approach: Prepare and configure test system. Then close down the old system. Downtime max. 1 week. During the downtime, do all the data migration. Then make the "test" system the new production system. Old and new system will run in parallel during the test phase.

Cornell - Big bang.

Updates on Local Implementations

Alabama has reference data spreadsheet and has loaded it. Waiting on mapping of inventory and MARC for holdings. Participating in bug fest. Having trouble with Inventory and RDA migration. Met with Voyager members and heard more about Texas A&M's mural.

5 Colleges participating in bug fest.

Duke - looking at scenarios and variables that will be needed to implement the scenario chosen. Patty recommended doing a mural like TAMU. Have our first FOLio forum planned for Aug 12.

Texas A&M - communication and marketing - how do we let the rest of the institution know what's coming?

Action items

- Karen Newbery build a template when a new page is created.
- Karen Newbery talk to Rachel Fadlon about publicizing IT&T