

2019-05-21 Meeting notes

Date

21 May 2019

Attendees

- [Karen Newbery](#)
- [Miklos Lendvay](#)
- [Patty Wanninger](#)
- [Chulin Meng](#)
- [Kelly Drake](#)
- [Kristen Wilson](#)
- [Elizabeth German](#)
- [Lisa Sjögren](#)
- [Paula Sullenger](#)
- [Thomas C. Wilson](#)

Goals

Discussion items

| Time | Item | Who | Notes |
|------|--|-----|---|
| | Announcements | | <p>Blog post from Lisa Sogren (Chalmers): https://blog.lib.chalmers.se/2019/05/20/the-journeys-of-a-folio-early-implementer/</p> <p>Will be demoing some circ features at the FOLIO Forum next week: https://zoom.us/webinar/register/WN_LKcsOIm6QYOYO9xGK9f5xg</p> |
| | How implementation teams are set up and the methods used, communication styles | | <p>Duke: https://sites.duke.edu/folioatduke/ newsletter for outreach - 3 Business Analysts, developer,</p> <p>Chalmers: 2 System Librarians, E-resources Sys Lib, Coordinator (core team), developers, all located in the same building. Communication - starting in the Spring started having informal hands-on sessions for staff to try FOLIO, two all-staff more formal meetings</p> <p>Alabama: 10 member implementation team plus ex-officio members from across the libraries, blog, email, all-staff face-to-face meetings, have started a weekly meeting in Tech Services where they go over how to use FOLIO to this point. Very careful to make sure people understand that look and feel may change. Now have annual goals relating to FOLIO in a few groups - supports getting people engaged in the process, hope it helps with training issues going for. Using Asana PM software to track implementation team, meeting minutes.</p> <p>Texas A&M: Big focus for past year has been database cleanup. Being strict about historical data that might (or may not be) be transferred into FOLIO. Implementation group meets biweekly - will start formal timeline at next meeting. Planning for full implementation next summer.</p> <p>FLO: Planning phase - small planning team, Core team - 2 of 9 libraries are going to migrate next year. Representatives from those libraries in the core team. Planning team reports to Core team. Will have timeline with goals and deadlines, first phase, address gaps in sandbox.</p> <p>Hungary: started with gap analysis 10 months ago. Have multiple modules that are not included in FOLIO (publishing, digital library, web archiving). Working on data clean-up. HERMESoft working with IndexData to improve FOLIO base functionality. Go live mid-end October 2019 with cataloging of rare books, discovery, storage layer. Summer 2021 for full implementation. Believes more successful going step-by step. Not just national libraries, but academic libraries involved in cataloging. Breaks training down, builds trust. Communication: have a section of website, but want to build a FOLIO website. Held conferences and invited libraries to participate, publications, library newspapers, record and publish lectures on webpage.</p> <p>German communities have website to share information.</p> <p>Lehigh: Same group that did OLE migration are working on FOLIO. Did data clean-up, so that's less of an issue. Have FOLIO Q1 running on test server with bib records. For physical collection, will be straightforward to get data from OLE to FOLIO. Waiting on ERM to see how the current workflows will fit in FOLIO. Has Coral now, EBSCO discovery service, waiting for later release and more ERM functionality.</p> |

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| <p>Gap Analysis locally, how do you keep track of the things you need to go-live and make sure they work/are ready for go-live</p> | <p>Thursday at PC meeting, Mark and Holly will be presenting capacity plan, so we know what is critical for folks. We won't have 486 issues to track, need to just track top issues. Issues get added every day - there is a dashboard filter to show what is unranked by your school. Chalmers writing down workflow tests in TestRail to surface things that may not be working as needed (Theodore from Ebsco is doing that for Chalmers). Take time to reach out to product owner or write questions /comments if there are questions.</p> <p>Tickets for ranking are at the feature level. Some details underneath are better thought out than others. UXPROD-1603 QA - is something that should be working anyway.</p> <p>Patty's example: Currently there are no print notices. Emails only. Can you go live without print notices? Print emails and mail?</p> <p>FLO has identified key areas where there's gaps focusing on those big over the next 6 months. Getting a sandbox to test little gaps.</p> <p>For items that you're locally unable to rank, you're welcome to put a comment requesting more information.</p> |
| <p>Data Migration Tools - are libraries planning to write data directly into FOLIO?</p> | <p>Lehigh - rated as go-live, but really need it now. API for 1 million records in Lehigh would take a week to load that many. Chalmers doesn't need this, as they're not using FOLIO for cataloging, so the priority was lower. Data import group decided that they'd use a command line process to write to the record storage. You could get a fully-loaded tenant by the end of the summer using the APIs. For every installation of FOLIO need to re-load data - there are no upgrade paths currently. Data loading was ranked high in FP, so we may have attention and developers by the end of this calendar year.</p> |

Action items

Possible topic - As part of implementation and rolling out local set-ups - could we set aside time to show how to do a function (explain their set-up for patron groups, loan set-ups) to appeal for outside groups? Is that something the Implementation Group could provide? Different tenants will be set-up differently, so different workflows or set-ups may be unearthed. - Could this be a FOLIO Forum? Is the Implementers Group the right place for this kind of thing to happen?