Cornell’s FOLIO implementation

migrating to a system still under development

Jenn Colt
Laura Daniels
Debra Howell
Jason Kovari

New York Technical Services Librarians
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FOLIO

Reasons to go folio
future of libraries is open

- Open-source Library Management System
- Large, global community: libraries and vendors
- Microservices architecture
- Broad metadata potential
- Integration of ERM functionality
Cornell in FOLIO-land

- Decided to implement Kuali OLE \(\Rightarrow\) OLE became FOLIO
- CUL part of FOLIO community deeply engaged in Special Interest Groups and as Product Owners
- Contracted EBSCO hosting services
Implementation Timeline

• Participated in development since FOLIO inception in 2016

• 2019 Cornell Implementation Team formed; including a project manager

• Original Go-Live date of July 1, 2020 ⇒ delayed to July 1, 2021 due to additional required development

• In parallel, migrated ERM system from ProQuest Intota to FOLIO ERM: completed January 2020
Goals:

- Integrating into the larger OLE/FOLIO community to represent CUL's interest and contribute to the partnership
- Testing various functions of FOLIO to insure that functions will work for CUL
- Identifying any functions that are not available in FOLIO but needed by CUL
- Identifying any workflow changes that need to be made within CUL
- Customizing FOLIO for Cornell
- Transforming and migrating of CUL data from Voyager to FOLIO
- Integrating FOLIO with existing applications, but not replacing the applications or introducing new applications
- Training of CUL staff in use of FOLIO
- Creating CUL-specific documentation for use by CUL staff
Data Clean-up & Migration

- Started clean up and practice runs long before migration
- Left some data behind
- Embedded Voyager identifiers
- Relied heavily on EBSCO
- Detailed shut down plan
- Prioritized data
- Deprioritized some data
- Clean-up work after go-live.
## Integrations

<table>
<thead>
<tr>
<th>Function</th>
<th>Product</th>
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</thead>
<tbody>
<tr>
<td>University Financial System</td>
<td>Kuali (open source)</td>
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<tr>
<td>Cornell Bursar System</td>
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<tr>
<td>Discovery and Access</td>
<td>Blacklight (open source)</td>
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<td>Interlibrary Loan</td>
<td>BorrowDirect and ILLiad</td>
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<td>Library Technical Services</td>
<td>GOBI</td>
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<td>Library Technical Services</td>
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<td>Library Annex</td>
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<td>Course Reserves</td>
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<td>Rare and Manuscript Collections</td>
<td>Aeon</td>
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<td>Rare and Manuscript Collections</td>
<td>ArchiveSpace</td>
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<tr>
<td>Library Technical Services (LTS) Workflows</td>
<td>In-house custom developed apps</td>
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</tbody>
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Training

• Communication, Communication, Communication!

• Slack space for questions

• Wiki space with FAQ, recordings of demos, tips, etc.

• Central Training Team

• Tech Services-specific training team
Original Expectations

- Could only migrate on FY turnover
- 6 months of stable environment for testing and training
- Development would stay on track
- FOLIO functionality would scale to our needs
- Documentation would be created by the community
- Functionality would change at a predictable speed
Complexities

- Cornell was first large library to migrate into FOLIO and scale became a problem

- Version we implemented released immediately before implementation

- Some parts of FOLIO underwent rapid functional changes requiring more re-training

- Constant monitoring of functionality and prioritization of needs

- Very little community documentation was available
Outcome

• Cornell's FOLIO implementation was shockingly smooth

• Some pain points continue
Lessons Learned

• Not everything we say we need is really needed

• Identify what work can be offloaded from staff (EBSCO really came through for us)

• Simulating a “production” environment is very hard, expect to find issues and roll with them as best you can.

• FOLIO implementation will be easier for anyone coming on board now and in future

• Value of partnerships

• Remove 'distractions'
Lessons Learned

For Training, specifically:

• Provide test environment with institution-specific data (helps contextualize)

• Be consistent when presenting terms used in/with the new system

• Repetition, repetition, repetition

• Encourage people to “drive” rather than watch a demo; encourage peer support and mentorship

• Acknowledge pain points

• Celebrate milestones
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Thank you!

Questions? Feel free to contact:
jak473@cornell.edu