Cornell's FOLIO implementation

migrating to a system still under development

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FOLIO

- 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 ⇒ 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

Implementation Team

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

Function	Product
University Financial System	Kuali (open source)
Cornell Bursar System	
Discovery and Access	Blacklight (open source)
Interlibrary Loan	BorrowDirect and ILLiad
Library Technical Services	GOBI
Library Technical Services	EBSCO Discovery Service (EDS)
Library Annex	CaiaSoft
Course Reserves	Ares
Rare and Manuscript Collections	Aeon
Rare and Manuscript Collections	ArchiveSpace
Library Technical Services (LTS) Workflows	In-house custom developed apps

Training

How are you feeling about FOLIO go-live?

- 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
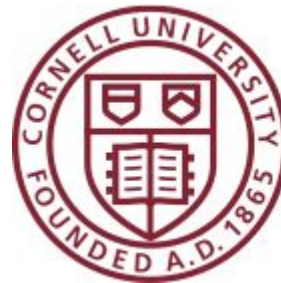
For Training, specifically:

- 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:
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