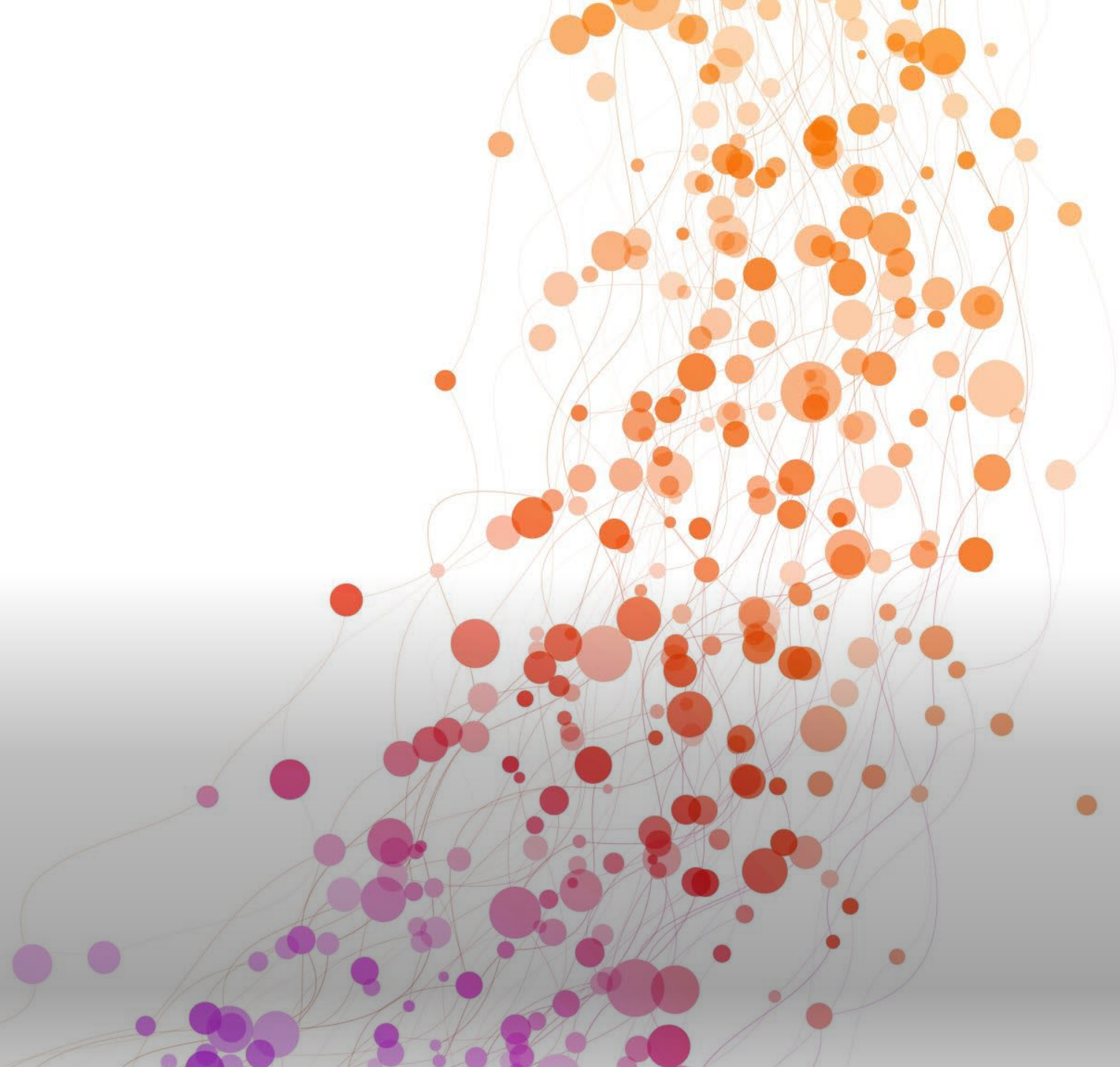# FOLIO at CUL

THE YEAR AHEAD

FEBRUARY 9, 2022

Agenda

- Community Council Update and Goals of the AUL for IT – Simeon Warner

- Product Council Update and FOLIO Release Roadmap – Jesse Koennecke

- Technical Council Update and CUL Security Team Overview – Phil Robinson

- CUL Support and Governance – Tom Trutt

- CUL FOLIO Priorities and Feedback – Debra Howell

- Reporting Update – Sharon Beltaine

Community Council Update & Goals of the AUL for IT

Simeon Warner

FOLIO Community and Governance

or, what on earth is the Community Council?

Community Council ———— **Foster a healthy and productive community ecosystem of sustainable collaboration for the FOLIO project**

Product Council

Technical Council

- Outreach and onboarding
- Resourcing
- Oversee governance, policies, etc.
- Elections
- Budget and staffing
- Dispute and conflict resolution

What has the Community Council done?

- Transitioned from OLE to FOLIO as an OLF project

- Successful implementation of governance model, initial council elections

- Membership/fundraising provided funds for technical infrastructure and 2 staff

- Progress on community communication

- Laid foundation for many regular processes (such as the 2022 membership campaign now starting)

- More to do: onboarding, more community development, maintenance and sustainability, outreach, …

Goals

Make our FOLIO work for us! Improve staff productivity and satisfaction

- Solidify internal support and governance: CUL-IT technical support, FOLIO Governance Committee (inc. Security sub-committee), and FOLIO Functional Support Team for CUL

- Prioritize our needs, find ways to make top priorities happen, track upcoming releases

- FOLIO–ArchivesSpace integration – phase 1 nearing completion, then need to plan next steps

- Reporting – build on existing work and explore additional options to meet needs

- Smooth FY rollover

Build larger healthy FOLIO community

- Engage with FOLIO community at many levels (councils, SIGs, partner libraries, development, linked data)

- Describe and promote FOLIO (e.g. Jenn & Debra IJoL article, CNI presentation)

- Form US Research Library group

Product Council Update & FOLIO Release Roadmap

Jesse Koennecke

Product Council

Community Council

Product Council

Technical Council

To maintain the FOLIO roadmap to reflect the best interests of librarians and users and to work with the development teams to deliver the roadmap as efficiently as possible.

11 elected members

Jesse Koennecke
- Elected to current PC
- Serving as co-chair
- CUL's appointed member of previous incarnation of PC – 2017-2021

Product Council

PC Description

The FOLIO Product Council guides the functional development of the FOLIO Library Services Platform. The Product Council manages the scope of the FOLIO product.

PC has the key responsibility of providing the product vision, strategy & roadmap with close collaboration with the Community and Technical Councils...

https://wiki.folio.org/display/COMMUNITY/FOLIO+Governance+Model#FOLIOGovernanceModel-Charter.1

Product Council

FOLIO Functional Roadmap

Feature ranking and prioritization

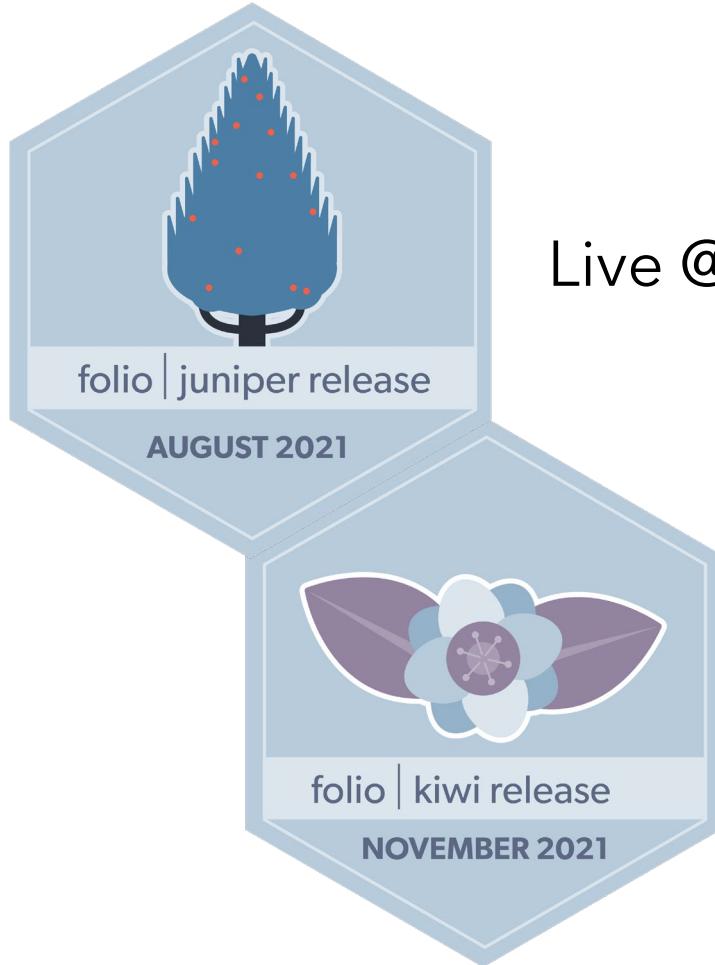**Working closely with the SIGs, POs, and the other Councils**

SWOT Analysis

Long-term release strategy

FOLIO functional scope review – what functionality is core to what libraries need?

FOLIO Roadmap – work in progress[2]

Theme	Sub-Theme	2021	2022	2023	Future
Customizations and user preferences	Customization in user management				██
Bulk Edit		██	██	██	██
Bulk Edit	Acquisitions bulk edit				██
Bulk Edit	Inventory bulk edit		██		
Bulk Edit	Users bulk edit	██			
Acquisitions cross app enhancements		██	██	██	██
Acquisitions cross app enhancements	ERM-acquisitions data from the ERM		██		
Acquisitions cross app enhancements	Requests- acquisition links to requests				██
Acquisitions Enhancements and Refinements		██	██	██	██
Acquisitions Enhancements and Refinements	Invoices enhancements		██		
Acquisitions Enhancements and Refinements	Organizations enhancements		██		
Acquisitions Enhancements and Refinements	Orders enhancements			██	
Acquisitions Enhancements and Refinements	Receiving Enhancements			██	
Tags Enhancements					██
ERM Agreements: Enhancements			██		
ERM Agreements: Entitlement log			██		
ERM Agreements: Enhancements to Local KB import			██		
Documentation		██	██	██	██
Inventory Search		██	██	██	██
Inventory Search	Inventory Elasticsearch	██			
Inventory Search	Back-end integration, initial front-end work		██		
Inventory Search	Faceted searching	██	██		

https://docs.google.com/spreadsheets/d/1e0ydj6vcjKNGFBdit0X4FioLmV9z6XgubOfwN2h_ZfE/edit?usp=sharing

Release Schedule – recent

folio | juniper release

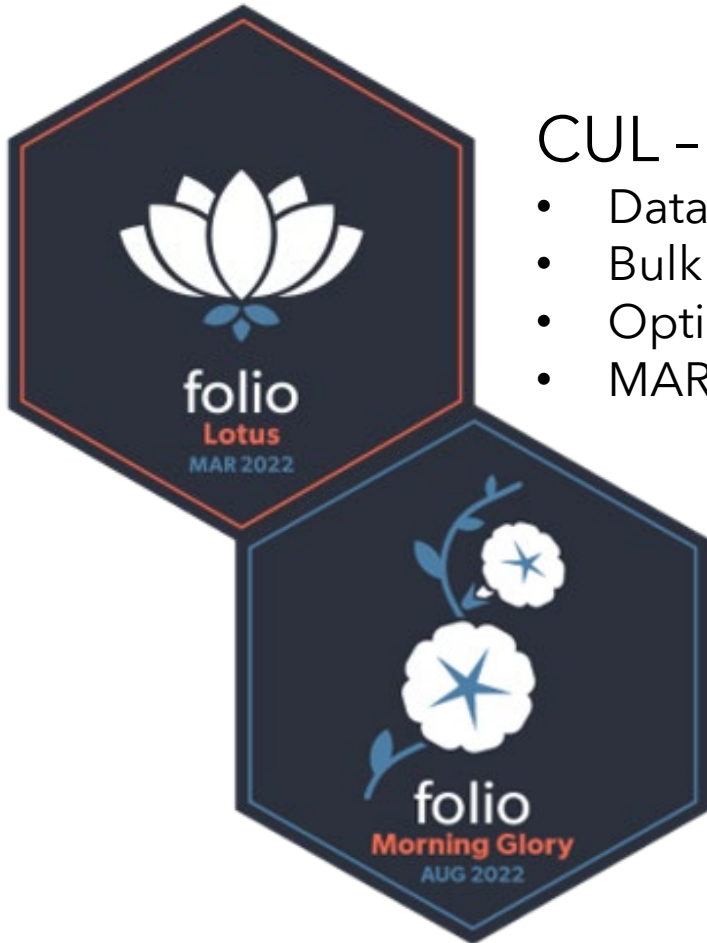**AUGUST 2021**

folio | kiwi release

NOVEMBER 2021

Live @ CUL – December 2021

Testing Dry Run Now
- Elastic Search in Inventory
- Improvements to data import and EDIFACT

Release Schedule – 2022

folio
Lotus
MAR 2022

folio
Morning Glory
AUG 2022

CUL – May/June
- Data import Phase 1
- Bulk edit proof of concept
- Optimistic Locking
- MARC authority records

CUL – October/November
- Data import Phase 2
- RUSH indicator in receiving
- Order importing improvements
- Circulation slip workflow and printing improvements
- Multiple service point improvements

Technical Council Update & CUL Security Team Overview

Phil Robinson

Technical Council

Community Council

Product Council

Technical Council

To set the general technical direction of FOLIO, provide technical guidance to the other Councils, lead technical evaluations and onboarding, set technical standards

11 elected members

Phil Robinson
- Elected to current TC in 2021, as the Cornell representative

FOLIO Technical Council
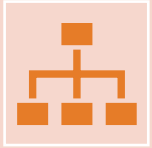
The role of the Technical Council (TC) is to set general technical direction, provide technical guidance to the Product Council, lead technical onboarding, set technical standards, and mediate technical disagreements amongst the community when needed.

There are 11 members, elected by the worldwide FOLIO community.

Phil Robinson was elected to the TC last summer and has been attending its meetings since July 2021.

FOLIO Technical Council

- The TC has been working on the high-level vision, strategic objectives, and initiatives of the FOLIO project, in conjunction with the Product Council and Community Council.

- Recently the TC has led technical evaluations of various new FOLIO apps and features (LDP app, Bulk Edit, etc). Typically, the requests come in from the PC or a Product Owner (PO).

- The TC is working on refining FOLIO module technical acceptance criteria and evaluation processes

- FOLIO Technical Road Map

- More information at https://wiki.folio.org/display/TC/Technical+Council

CUL FOLIO Security Subcommittee

- **The FOLIO Security Subcommittee (FSS)** formed in November 2021.

  - Comprises 6 CUL staff members from a variety of areas

  - Phil Robinson, Director of Library Systems, is Chair, responsible for convening the group as needed and making decisions on unclear security situations that require an independent decision.

- Members as of 11/8/2021: Phil, Vandana Shah, Jean Pajerek, Lisa Maybury, Andy Horbal, and Amy Blumenthal.

THE PASSWORD IS WEAK BUT WILL SOON BE BACK WITH GREATER NUMBERS

CUL FOLIO Security Subcommittee

Responsibilities

- The FSS is responsible for overall FOLIO security governance and best practices at Cornell, including managing FOLIO user permissions at Cornell. Among the specific duties of the FSS are:

- Assigning, updating, and removing staff and student employee permissions when user assignments change (new hire, change in duties, departure, etc.). Security requests will be initiated and sent by CUL HR or the user's supervisor to **folio-security@cornell.edu**. Supervisors may request changes to their own permissions, or to their staff members'.

Thank you to everyone who has begun using this process to onboard FOLIO users!

CUL FOLIO Security Subcommittee

The FSS works as a team to promptly respond to incoming FOLIO access requests, which come in via the folio-security EGA to our FOLIO security queue in TeamDynamix (TDX).

This January we handled many requests to set up hundreds of Spring student employees with FOLIO permissions. We currently capture the permissions updates in spreadsheets but are seeking a programmatic solution.

The FSS will maintain and publicize documentation on FOLIO permission descriptions to help guide decisions on permission assignments.

If new permissions sets are needed, the FSS will discuss them and create them as appropriate.

Members of the FSS should also stay up to date on changes in FOLIO permissions and permission sets as hot fixes and new releases come out. They will regularly update the permissions documentation as appropriate.

More information at https://confluence.cornell.edu/display/folio/Security

CUL Support & Governance

Tom Trutt

Support & Governance

- Provided by Support Team, led by Tom Trutt
- Configuration of and assigning Settings, etc.
- FOLIO functional, process, and workflow questions and issues

- Overseen by CUL FOLIO Governance Committee
- Oversight
- Enhancement requests
- Security; including permission sets

Functional Support

Governance

Technical Support

FOLIO Community

- Provided by CUL-IT
- D&A
- Integrations
- Liaison with EBSCO hosting

- Releases
- Bug fixes
- Development
- SIGS

Support

John submits a problem ⟷ FOLIO Support SIG

Is the problem:
- Configuration
- Workflow
- A Bug
- A new Feature
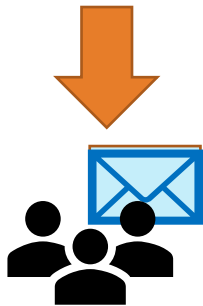
⟷ Hosting

⟷ CUL Tech Support

⟷ CUL-IT
CUL Committees

⟷ FOLIO Community

Library Staff

What about new features?

Jane submits a feature request → CUL Governance Ranks the request ⇅ The request is added to JIRA → The JIRA is reviewed and ranked by other stakeholders ⇅ The JIRA is reviewed and refined by the SIG(s) → The Completed JIRA is passed onto development
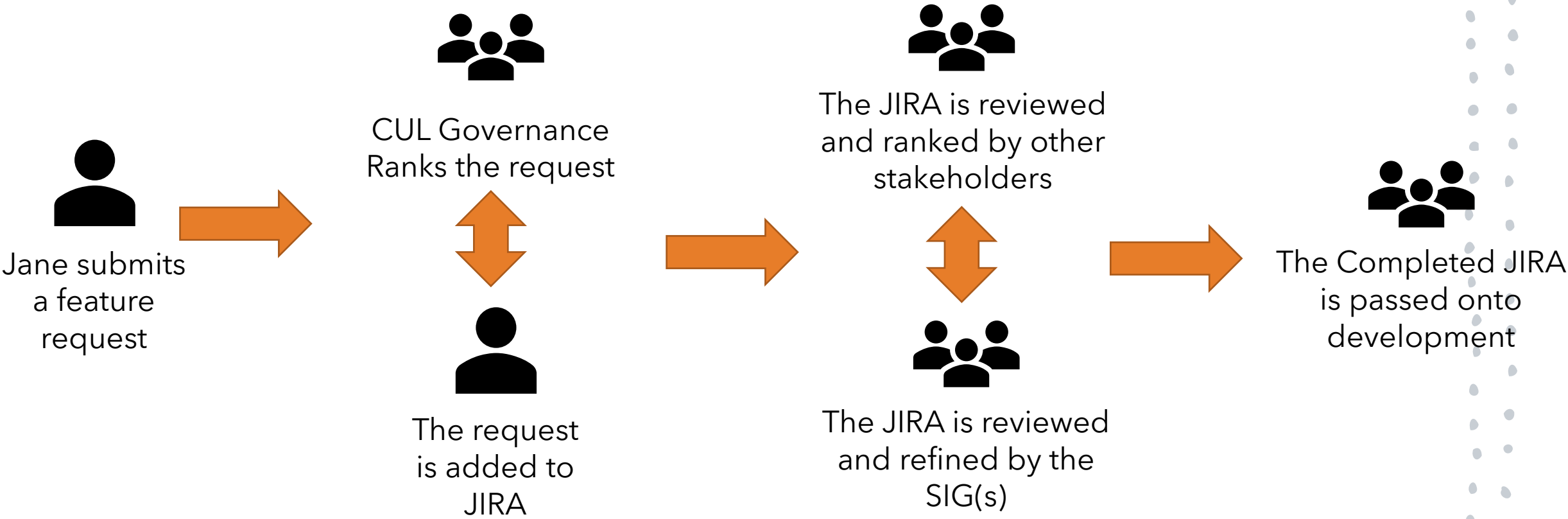
How to get help?

- folio-support@cornell.edu

- folio-security@cornell.edu

- Slack – Cornell Library Workplace; **#cul-folio**

- **COMING SOON –** Support web portal

CUL FOLIO Support Sig members:

    Thomas Trutt – Chair
    Laura Daniels
    Jenn Colt
    Ann Marie Crowley
    Frances Webb

What should I submit?

Everything.....

- Multiple reports of an issue helps us identify trends and impact on staff.
- Someone may have not reported the issue you are seeing.

"There are naive questions, tedious questions, ill-phrased questions, questions put after inadequate self-criticism. But every question is a cry to understand the world. There is no such thing as a dumb question."

— Carl Sagan, The Demon-Haunted World: Science as a Candle in the Dark

CUL FOLIO Survey Feedback & Priorities

Debra Howell

Does FOLIO provide you with the functionality you need to efficiently do your job?
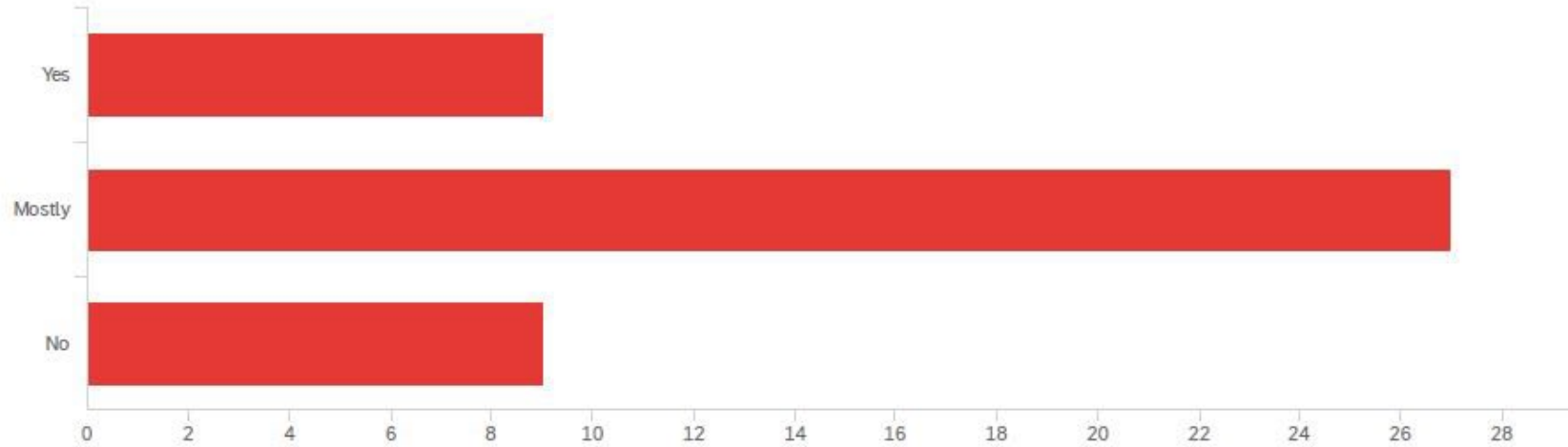
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	3. Does FOLIO provide you with the functionality you need to efficiently do your job?	1.00	4.00	2.13	0.78	0.61	48

"Maybe" or "No" Themes:

Too slow; APIs not performant

Too many pop-ups

Reporting issues; LDP difficult to use

Prior history not loaded into FOLIO

Invoicing, receiving, and order issues

Cataloging is clunky

Printing is big problem

Is there any kind of training you would like to have in order to make your job easier?
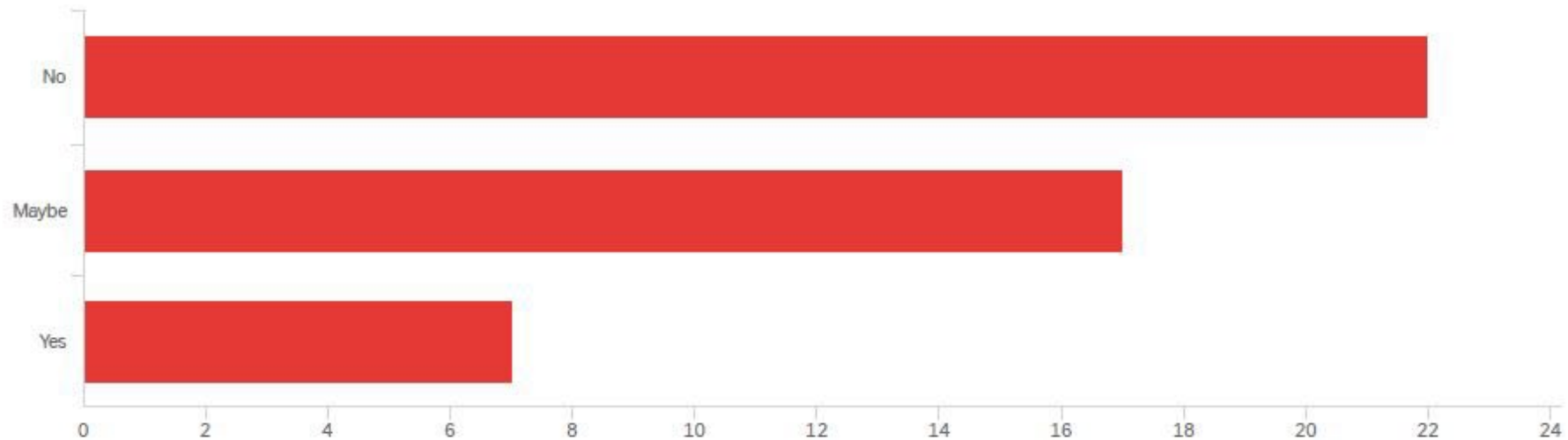
Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
5. Is there any kind of additional training you would like to have in order to make your job easier?	1.00	4.00	1.77	0.85	0.72	48

Themes:

A refresher on dBeaver and SQL reporting

Learn how to batch load records from vendors

Item records: how to find what you need

Re-start the drop-in FOLIO "any questions" sessions; include "Tips & Tricks"

More demos; especially for acquisitions

Is FOLIO work in other areas impacting your own FOLIO work?
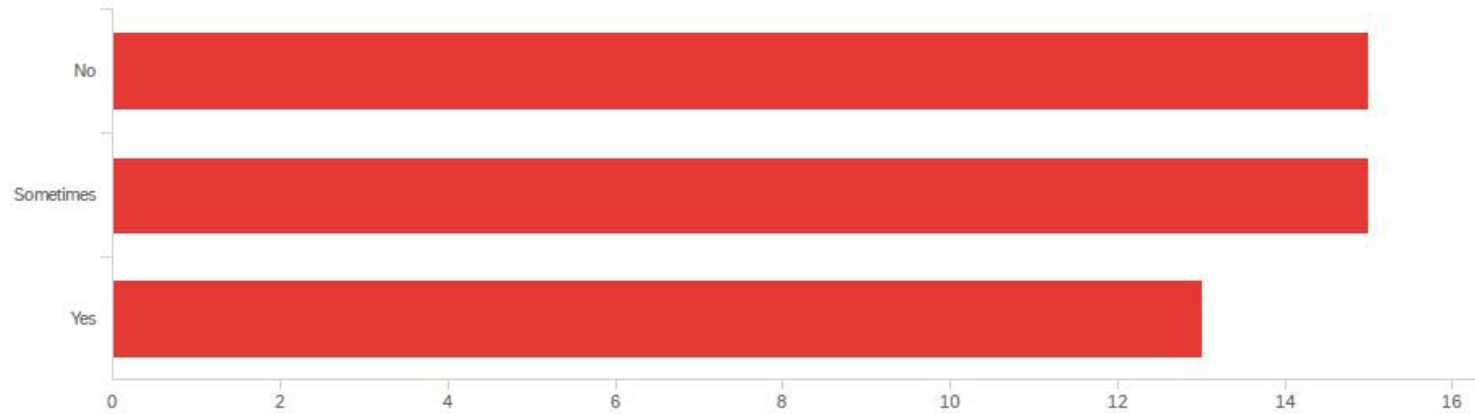
#	Field		Choice Count
1	No	34.88%	15
2	Sometimes	34.88%	15
3	Yes	30.23%	13
			43

Themes:

Bulk editing (lack of)

Overall performance; wait times

Data import's slowness and instability impacts anyone who uses Inventory

Which of the following best describes your current overall productivity level with FOLIO?
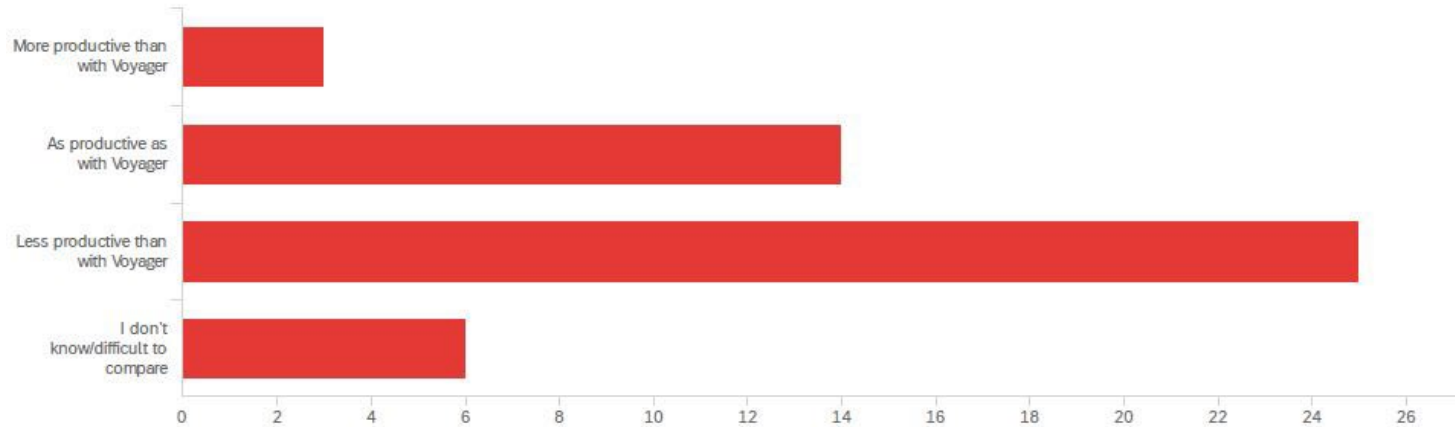
#	Field		Choice Count
1	More productive than with Voyager	6.25%	3
2	As productive as with Voyager	29.17%	14
3	Less productive than with Voyager	52.08%	25
4	I don't know/difficult to compare	12.50%	6
			48

"More" or "Less" Themes:

Less

- Things seem to be more difficult and take more time in FOLIO than it did in Voyager

- Sending POs via EDI will increase productivity

More

- The Fast Add feature is very helpful

- Easier to do everything electronically

What do you like best about FOLIO?

- Web-based

- Being able to look up patrons by NetID

- The Community

- Open-source

- Easier to train student circ staff

- Paperless

- Intuitive

- Agreements app

- We survived the first 6 months!

CUL FOLIO Priorities

Performance	Development of highest impact issues	Bug fixes	Reporting
• Including addressing survey feedback • Upgrades!	• Prioritized list from LTS • Holly's observations of circulation and cataloging	• Known Issues & Statuses	• Completion of "go-live" reports • Addressing survey feedback

Reporting

Sharon Beltaine

Reporting: Teamwork

- Reporting Team
  - This dedicated group of part-time contributors from various functional areas of the library has enabled the Cornell Library to transition from Voyager to FOLIO reporting

- New Skill Sets
  - SQL programming
  - Understanding FOLIO data models
  - New reporting applications and reporting database structure

FOLIO Reporting Team

- *Vandana Shah*
- *Natalya Pikulik*
- *Jean Pajerek*
- *Linda Miller*
- *Joanne Leary*
- *Kim Laine*
- *Shayla Harrington*
- *Nancy Bolduc*
- *Sharon Beltaine*

Reporting Today: Overview

- Services
  - access to FOLIO LDP reporting database via Virtual DBeaver
  - nightly data transfer from FOLIO applications to LDP
  - 50+ report queries with filters for different parameters
- Support
  - Reporting Help Ticket System
  - Reporting Users Group meetings
- Development
  - FOLIO Reporting SIG data analytics functionality development

Reporting Today: One-Stop-Shop for Help

Link for the FOLIO Reporting Documentation Confluence Page:
https://confluence.cornell.edu/display/folio/FOLIO+Reporting+Documentation

Topic	Description
Getting Starting with FOLIO Reporting (IN PROGRESS)	summary of the FOLIO reporting methods, environment, and tools
Joining the Reporting Users Email List	instructions for joining the CUL-REPORT-USERS-L email list to stay informed on reporting features, server outages, and other updates
Requesting Access to FOLIO Reporting	how to request access to the CUL FOLIO LDP reporting database to run and/or build reports
Connecting Virtual DBeaver to the CUL LDP Reporting Database	instructions for configuring Virtual DBeaver to connect to the CUL LDP (Library Data Platform) reporting database
Running Report Queries with Virtual DBeaver	instructions for running, modifying, and saving FOLIO report queries with Virtual DBeaver connected to the CUL LDP (Library Data Platform) reporting database
FOLIO Canned Reports Directory (IN PROGRESS)	directory of all CUL FOLIO canned reports with links to the report queries and descriptions
FOLIO Reports Filter Directory	list of options for all parameters that can be used in report queries to filter results, e.g., location, item status
FOLIO Ad Hoc Reports Directory	directory of all CUL FOLIO ad hoc reports with links to the report queries and descriptions
Using the CUL FOLIO Analytics Report Repository	instructions for accessing and using queries on the Cornell Library's FOLIO Analytics report repository, a GitHub repository of SQL report queries and documentation written for the Cornell Library
Requesting Reporting Help	instructions for using our online form to make a new report request, get help with running reports, and ask other reporting questions
Reporting Training Session Recordings & Slides	recordings and slides for past FOLIO Reporting session training sessions offered to CUL staff members
SQL Training Resources	list of links to SQL training resources
SQL Tips and Tricks	tips and tricks for writing queries using SQL with the CUL FOLIO LDP reporting database
Importing data into the Local Schema	draft instructions for importing tables into the local schema for use in LDP queries

Reporting Today: Canned Reports

Front end:

Confluence

interface

CUL Report Code and Link to Query	Last Updated	Report Name	Description
CR100	1/14/22	loans_counts	loans by location
CR101	11/29/21	fund_expenditures_by_po_line_invoice_payments	shows fund expenditures by purchase order line within a given invoice payment date range. For each purchase order line number, the fund data attributes are shown alongside the purchase order line transaction amount.
CR102	7/27/21	title_count *WARNING: long-running query!	provides title counts for non-electronic resources cataloged in inventory by various filters
CR103 (being updated)	in progress	physical_and_electronic_expenditures	All materials expenditures divided into physical, electronic, and a mix of both physical and electronic
CR104	11/19/21	claimed_returned	shows a list of items that patrons claim they have returned, but are not showing as checked in by the system (where the item status is 'claimed returned').
CR105	11/16/21	item_related_exceptions	shows a list of exceptions, which are actions taken by an

All Reports

Back end:

cul-folio-analytics

GitHub repository

🔀 main ▾   **cul-folio-analytics** / **canned_reports** /
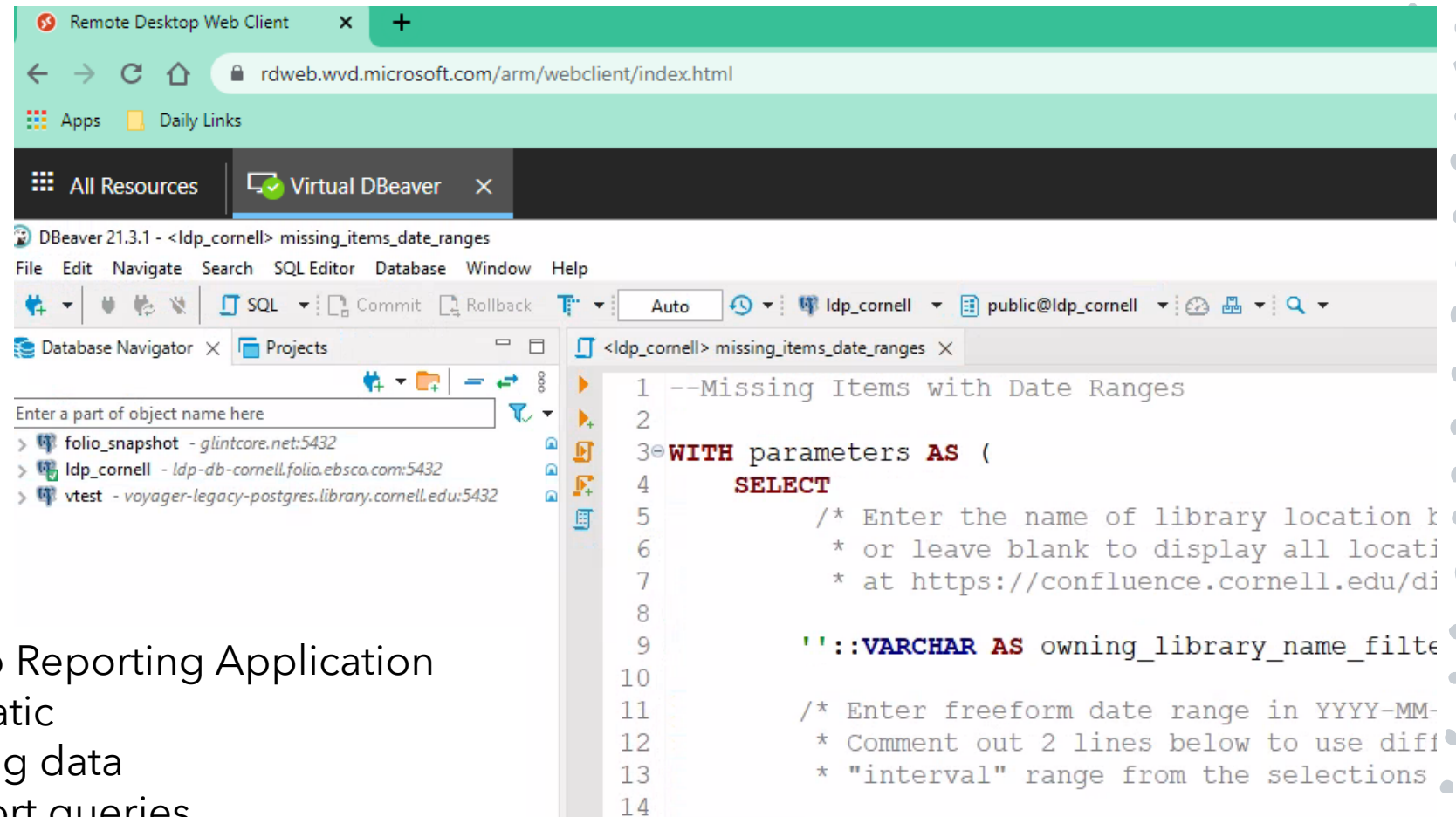
👤 VandanaShah-Cornell Update Borrow_direct_interlibrary_loans_recalls.sql …

..

📁 CR100	Update loans_counts.sql
📁 CR101	Delete fund_expenditure_summary.sql
📁 CR102	Update title_count.sql
📁 CR103	Update README.md
📁 CR104	Update claimed_returned.sql
📁 CR105	Update Item_related_exceptions.sql

Reporting Today: Virtual DBeaver

Virtual DBeaver Team

- *Paul Owens*

- *Debra Howell*

- *Phil Robinson*

- *CIT*

- *CUL Desktop Services*

- Web browser interface to Reporting Application
- Software updates automatic
- Secure access to reporting data
- Save and reuse your report queries

Reporting Today: Excel Data Sets

- Report results can be saved in CSV (Comma Separated Values) format, which can be opened, edited, and saved in Excel

- This example shows the results of the loans_counts query (CR100), which provides loan counts by library, patron, material type, and loan policy in a given date range

Reporting Tomorrow: LDP Dashboards

- Interactive data visualizations for LDP FOLIO datasets created with Tableau Desktop and posted to Cornell's Tableau server

- CUL staff will be able to view and filter dashboard data using the free Tableau Reader application
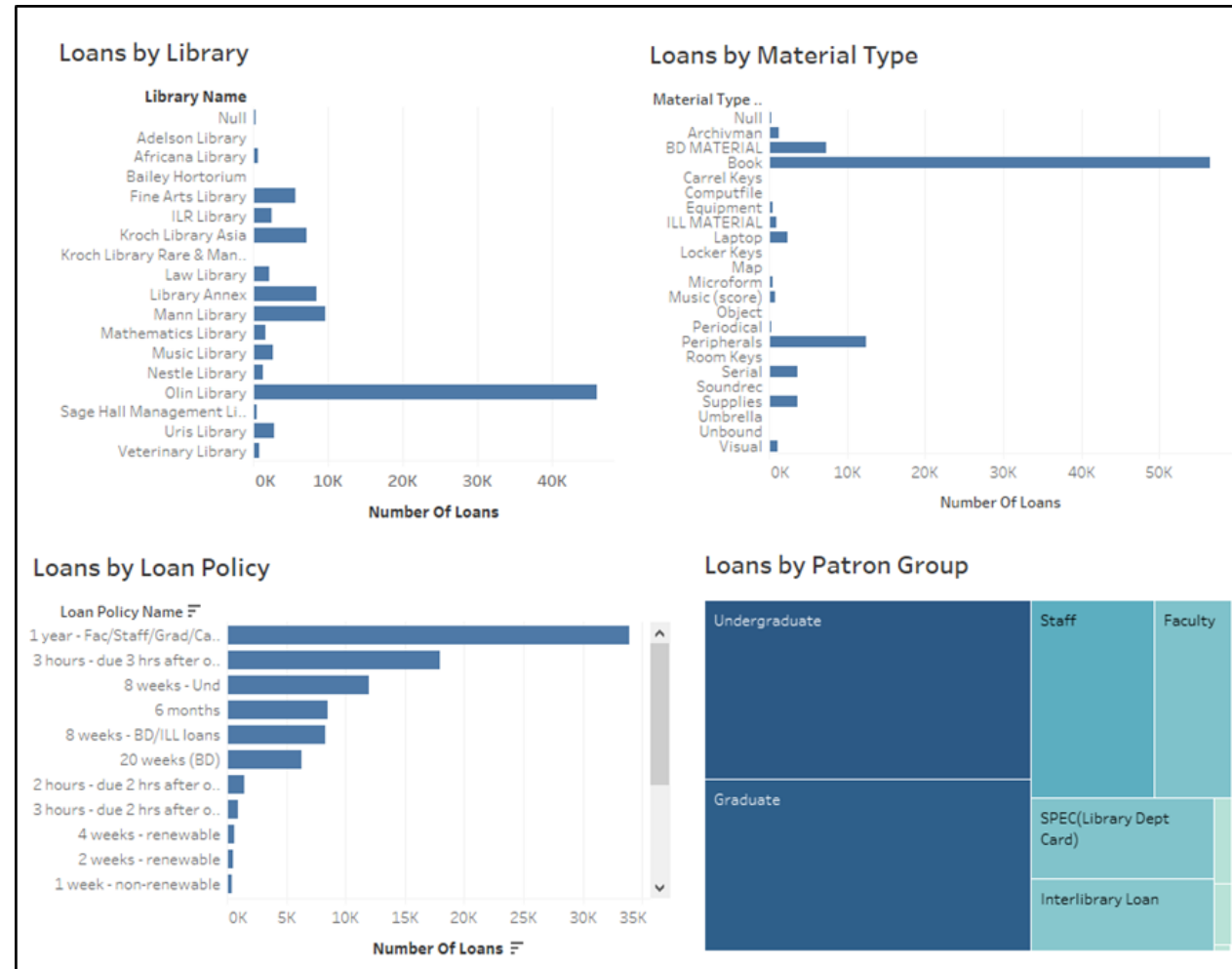
Reporting Tomorrow: Metadb
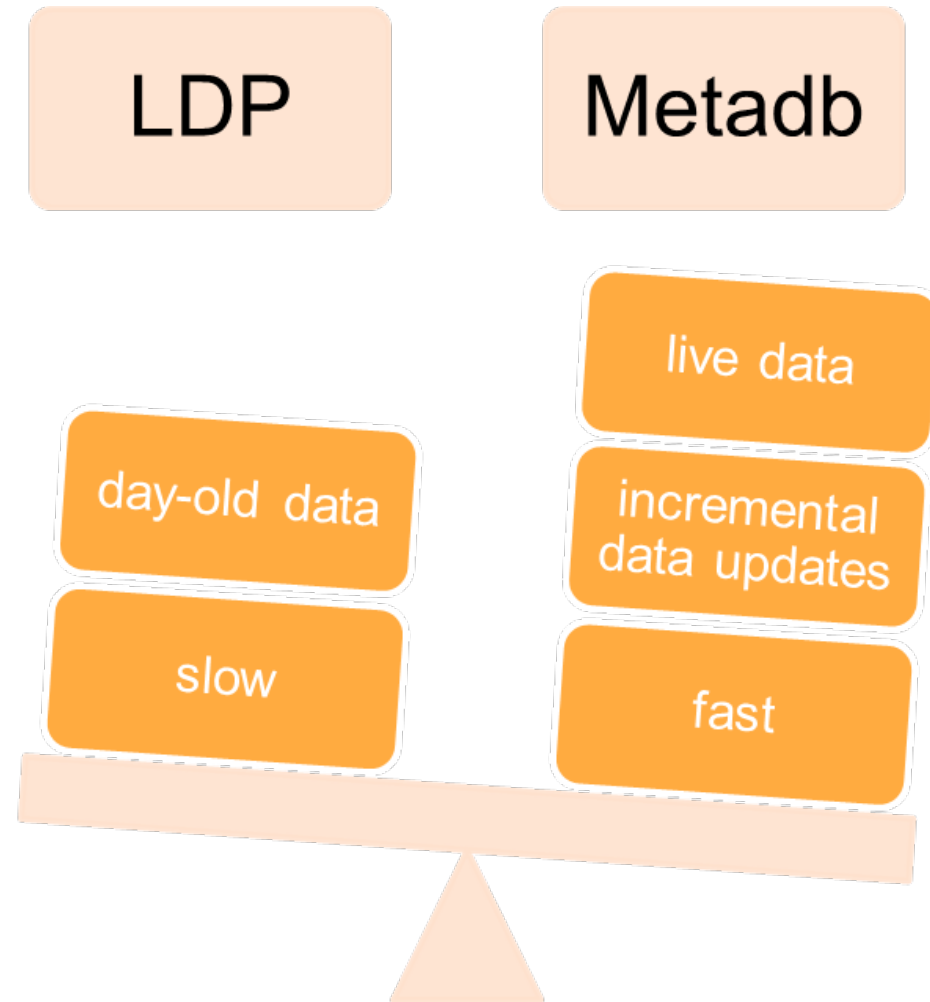
Reporting Tomorrow: LDP Query Builder App

The LDP Query Builder App will be available in the Lotus FOLIO Release

Reporting Tomorrow: Summary

- Building a Reporting Production Support Model

- Continue to Grow CUL Reporting Services, Support, and Development

- Transition from LDP to Metadb

- Integration of LDP Query Builder App into reporting services

- Integration of non-FOLIO data into reports (e.g., ARES, Voyager)

- Local derived table development

- Data Visualizations via Tableau Dashboards from FOLIO LDP/Metadb

- Report automation

Questions