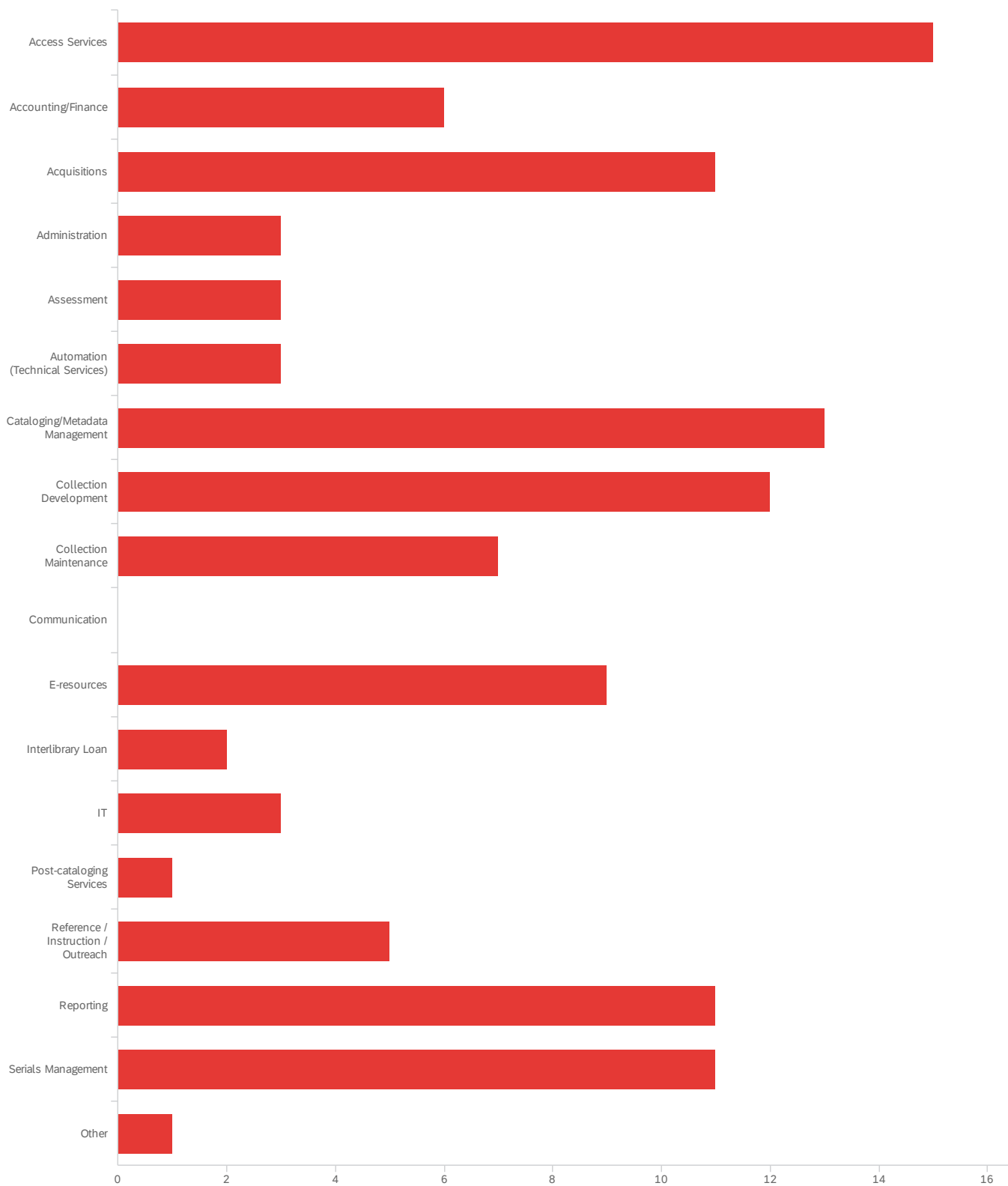# Default Report

FOLIO Survey for CUL Staff __FINAL

February 3, 2022 4:35 PM EST

Q1 - 1. Which functional areas are most related to your work? (check all that apply)

#	Field	Choice Count	
1	Access Services	12.93%	15
2	Accounting/Finance	5.17%	6
3	Acquisitions	9.48%	11
4	Administration	2.59%	3
5	Assessment	2.59%	3
6	Automation (Technical Services)	2.59%	3
7	Cataloging/Metadata Management	11.21%	13
8	Collection Development	10.34%	12
9	Collection Maintenance	6.03%	7
10	Communication	0.00%	0
11	E-resources	7.76%	9
12	Interlibrary Loan	1.72%	2
13	IT	2.59%	3
14	Post-cataloging Services	0.86%	1
15	Reference / Instruction / Outreach	4.31%	5
16	Reporting	9.48%	11
17	Serials Management	9.48%	11
18	Other	0.86%	1
			116

Showing rows 1 - 19 of 19

Q1_18_TEXT - Other

Other
CaiaSoft integration Annex Library

Q2 - 2. What do you like best about FOLIO?

2. What do you like best about FOLIO?

I like that FOLIO is web-based instead of client-based. I like that I have input into the direction of FOLIO's development, although my suggestions are often disregarded by those in charge of decision-making.

Being able to look patrons up by NetID and (hopefully) frequent updates resulting in fixes tailored to us.

1. The community - it is nice to know we are in this together with others and can enact change. 2. the web-based nature of the tool; Voyager's client-based nature was difficult for those who did not work in the system every day.

Not aware of anything yet

I like being able to pull patron records up by their net ID's

It's not Voyager. aka Yay APIs. More specifically, data is accessible via purposely spec'd and implemented application programming interfaces (API) over HTTP. What this means is that FOLIO better meets the expectations of modern applications, allowing for, and better supporting, integration with external systems.

ability to open apps in different tabs and windows and to resize work area. The eHoldings and Licenses apps have potential for better understanding of e-resources when fully populated. Access to invoice attachments is very nice.

I like how intuitive the web interface is for training students. It's been much easier to train student circulation staff on using folio.

paperless

that we can all use it with a good amount of confidence. it is still clumsy but that makes it easy to identify what we want improved and how.

That it is open source and we have input in its development. That it is more current technology that can grow with future needs. That FOLIO will let us share reporting queries more easily (although that comes with additional work/coordination). That the LDP is able to process larger numbers of records; that was failing in Access. That you can mimic Access macros with multiple queries in one SQL editor.

I think the program is pretty intuitive. It's easier to navigate than voyager was.

I like the functionality of looking patrons up by net ID. The program is more robust than voyager was. It allows for different search functions. I like the ability to be able to bounce back and forth with the various apps in separate windows.

I like FOLIO because it is a developing tool. Many issues have been found and more issues will be found later but it is fixable and we are involved the changing process.

You can make settings changes easily. The settings (outside of the circulation rules) are more straightforward.

I like being able to look up records (bibliographic or patron records mostly) in the apps by many different data elements.

I'm a big fan of open source, and not a big fan of paying vendors huge licensing fees. I like that FOLIO has had so much librarian input in its design and functionality. The FOLIO community is also super-helpful and supportive overall.

Search for title can include contributor.

I love most of the access services parts of FOLIO, The serials management has been a little harder for me, and it feels clunky + so many steps.

The fact that users have input on what needs to be developed, and how things are developed, is a great feature that Folio offers. The fact that it is an integrated system is also something I really like. Over time, course reserves and many other such areas will be integrated into Folio. I always found it inefficient to have so many different systems at CUL.

The thing I like best is (because it's web-based) being able to have multiple windows open at once.

that Cornell has some say in its development and features, and that it can continue to be refined/improved and grow

The abundance of data to slice and dice.

It is easier to use than it originally looked.

I like the flexibility to change things if something isn't working quite right or got updated wrong.

I like that it is developed and controlled by the library community, not as another asset of a finance holding company.

Online and all in one spot

Invoicing seems to be quick and efficient. I like that you can upload a copy of the invoice to FOLIO.

Being able to search for patrons by net ID.

That it is Web and windows based and it is easy to access when working from home. It provides a lot of information.

Friendly web environment, not scary, not cranky

Not much. FOLIO has made it very difficult to do my work. I miss Voyager.

Flexibility of reporting with LDP.

It's not proprietary and our feedback informs development. It's designed to change, as our standards and needs change.

To be frank, there are some tiny things I can pull out in reporting that I couldn't with Access/Voyager, but that's about it. I've gotten used to FOLIO.

The ability to have more than one app open and the ability to move from one to the other. Also, the ability to copy/paste within folio. That was not easy in Voyager. (Example: the ability to copy a barcode from Inventory and paste in to another app...)

I like the Agreements app - it allows us to tie together many pieces of information that we were unable to do in our previous systems. I also like that we are storing pdf copies of invoices in the order, and, in the case of electronic resources, emails containing funding instructions. It will be helpful in the future to keep track of what we have been paying for and our perpetual access rights. I've started using the Dashboard app, and that looks promising.

That is a tough question. I would not have thought to ask it. The best thing is that we survived the first six months.

web-based

Readability More stable than Voyager

Seeing the invoices attached electronically to the payment requests. Searching invoices is quick and easy.

I like that FOLIO is web-based instead of client-based. I like that I have input into the direction of FOLIO's development, although my suggestions are often disregarded by those in charge of decision-making.

Being able to look patrons up by NetID and (hopefully) frequent updates resulting in fixes tailored to us.

1. The community - it is nice to know we are in this together with others and can enact change. 2. the web-based nature of the tool; Voyager's client-based nature was difficult for those who did not work in the system every day.

Q3 - 3. Does FOLIO provide you with the functionality you need to efficiently do your job?
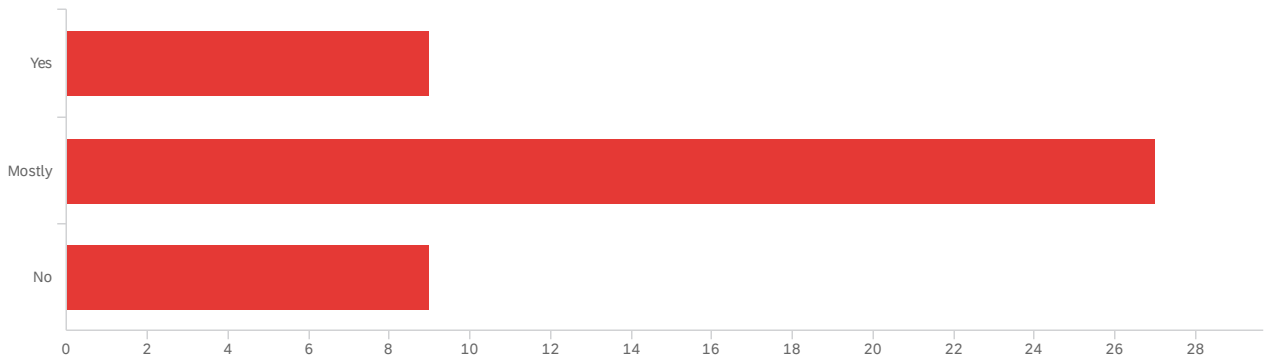
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	3. Does FOLIO provide you with the functionality you need to efficiently do your job?	1.00	4.00	2.13	0.78	0.61	48

#	Field		Choice Count	
1	Yes		20.00%	9
2	Mostly		60.00%	27
3	No		20.00%	9
				45

Showing rows 1 - 4 of 4

Q3_4_TEXT - If 'Mostly' or 'No', please explain below:

WIDGET_ERROR.ERROR

Q3a - 3a. If you answered 'Mostly' or 'No', please explain below:

3a. If you answered 'Mostly' or 'No', please explain below:

Training happened when I was away. I'm making do using the public catalog now.

To slow with far too many useless pop-ups.

While there are APIs, they are not always performant. Also, the release cycle is frustratingly cryptic and feels painfully slow. I get it…this is a big project, with many moving parts, but the paradigm shift described with the original vision, is far from being realized. The vendors retain too much control, especially when it comes to decisions regarding what is implemented or fixed and when. "FOLIO, an open source project, aims to reimagine library software through a unique collaboration of libraries, developers and vendors. It moves beyond the traditional library management system to a new paradigm, where apps are built on an open platform, providing libraries more choice and delivering new services to users." For a quick health check on the project, look no further than the platform & roadmap page of the project site and the official docs, which are currently three (soon to be four) releases behind. * https://www.folio.org/platform/ * https://docs.folio.org/docs/ * https://wiki.folio.org/display/REL/Flower+Release+Names

The fact that historical acquisitions data was not loaded into FOLIO makes FY22 inefficient (need to work from multiple spreadsheets and try to reconcile). I look forward to FY23. Not being able to use call number as it relates to holdings as a reporting field in DBeaver makes it more difficult to do my job. I wish Inventory and Finance apps were more integrated (click from one to the other).

It's just slightly worse at a lot of things than Voyager was, e.g. extra pop-ups and longer lag times when doing check-ins.

There are some snags in folio that can really slow down circulation workflow. The biggest is the amount of lag when scanning a barcode. It would also be nice if Hold Slips printed in call number order.

Wish it were a bit faster

think can answer this question better as it is used more. Certainly still learning.

paying invoices, creating POs, involves a metric ton of clicking around everywhere just to do one invoice and link it to the correct inventory record. Why do we have to deselect "release encumbrance" every time? Why not default it to be already deselected? Furthermore, I got a communication from Accounting telling me, "I tried to approve the …invoice and I got an error message saying that the vendor associated ID belongs to a non-vendor organization. Could you please fix this?" WTF does that even mean?

Wish reporting was more visual, as it was in Access, but am getting more and more used to not having that. Good that Metadb will break out more of the data in JSON. This is the first time we have transitioned to a new LMS that is still in development; it has been pretty much impossible to keep up with all of the developments and get other work done. Virtual desktop makes it harder to share files, and dumps you out without saving queries if it is left unused while, but glad to have a work laptop to be able to work from home.

Renewing items for Faculty is a pain. If I renew everything on an account at the same time it can take up to 20 minutes for the system to actually run the command. The check boxes to select items are very small and if you are trying to select a large number of items at a time, without selecting all, it can be frustrating because if you accidentally click outside the check box it resets everything you have checked. I wish there was a ctrl+shift function so that I could drag and scroll to select a large number of items at a time.

Loss of prior history on each of the books is unfortunate when it comes to trying to track down missing books to see when they were last used. This was very useful information as to how long it was last used or checked in.

In FOLIO, we cannot send our purchase orders via EDI yet. Once EDI is implemented in FOLIO, order processing will be more efficient.

Folio was a significant step backwards in terms of doing the day-to-day work of access services. Printing alone is slow and adds significant time in processing materials. The effort associated with doing all the fixes for this system is significant. Unlike if we had migrated to a vendor product, there are basic bugs that requires so much time to identify. This is all added work on our areas that we have just integrated into our day to day lives, all with less staffing.

3a. If you answered 'Mostly' or 'No', please explain below:

My job is data collection and analysis. I found it difficult to use the LDP at first, but now I'm mostly used to it, like you get used to tight shoes or any less-than-perfect aspect of life. I don't use the apps, except as they relate to verifying query results or exploring how tables of data relate to each another. I've used the Settings app most frequently, as there are so many questions about permissions, circ rules, locations, libraries, etc.

I actually have been delaying doing aspects of my serials work because it feels clunky and like so many steps. For access services, it feels like it provided the functionality I need.

I work mostly with reporting, and some data elements are still not in Folio, so that leads to some limitations for reporting. However, this is a short-term issue.

Many of the search functions are sorely lacking. For just one example, invoice searching is absolutely horrible, and should include vendor and title searches, perhaps HRID's etc. Then there's (still?) the problem with how FOLIO handles diacritics.* I say still, because although this problem may have been fixed, I've already grown accustomed to using my workarounds. *as in, badly!

The requirement of learning SQL to run reports is a significant learning curve for which I have not had the time to fully acquire. Many features that were readily and easily present at the item level in Voyager (for example, checkouts and browses) now require scripted reporting to be created and then run in a separate system (dBeaver). Folio seems to be so layered that one has to click through numerous screens and levels to get to data, and then back out again through numerous clicks. It's like endless vertical silos that one has to go down into and back out and across, down and back, etc. to get to anything. For me this has caused time spent on routine tasks to increase *dramatically* - multiply this by other selectors in CUL and it's a lot of extra staff time. Basic terminology of key concepts used for decades suddenly changed unannounced with Folio, one example being BIBID's being replaced with HRID's and other related terms, which have sometimes had different meanings than BIBID's. The Folio Fridays sessions I attended were so technical and granular that I stopped going to them, they were not useful to someone like me who is not an IT person. But overall the most disappointing aspect of Folio has been the reporting - my staff and I spent many hours giving very detailed feedback in the years leading up to the release on the core reporting features we needed. Since the release of Folio I've had to give the same feedback again that I provided before the release emphasizing the need for some of the most basic information to be included in reports (title of resource, for example). However, the Folio team has been very responsive and added these reporting needs!

LTS should involve all stakeholders in coming up with naming conventions for tagging expenses for serials, books, databases and other expenses that affect selectors.

I supervise students who would typically be paging and updating items from Cornell's collection to send out on Borrow Direct. To date, FOLIO has been a roadblock to lending items on Borrow Direct despite Cornell's best efforts to get it up and running.

The data import functionality and performance and logging is inadequate at this time. Slows down our processing at a time when we already have a backlog. And enhancing records with better metadata is hardly even an option at this stage.

I don't use it often enough to know. Sometimes I need to look at a contract and that is in another system (box) and I can't view that.

There are still many bugs associated with Receiving and Orders, some with no clear workarounds. Serials receiving can be a bit slow too because of the lack of functions such as sorting columns and needing to work between two apps.

There needs to be more ways of being able to manipulate data with in the windows. It would be nice to pull up multiple records at once and be able to work on them. It would also be nice to be able to work on records with out everything resetting every time you save. Being able to manipulate volumes and years. If I call/look up a barcode I just want to see that record and I don't need to see everything else and have to hunt to get to that bar-code.

QuickEdit for MARC isn't great

I need to see all the charges to my funds live when I check the FOLIO app. I don't want to open DBEAVER which requires so many more steps. Please add all titles expended on each fund in the FINANCE or other APP. I get regular emails from LTS telling me a fund doesn't have enough money even though I carefully figure out what each item costs and keep track. Trying to figure out what's wrong takes up a lot of time for multiple people.

3a. If you answered 'Mostly' or 'No', please explain below:

Tools that we need for data extract, transform and load to other systems are still not complete, causing a backlog in our processes. Also, DBeaver as a query tool is lacking the ability to mount more than one data source. This hampers our ability to make queries using different databases in a single query.

Performance issues (slowness, inscrutable error messages) still plague the single record import process in Inventory. Also, we still have to create MARC data for resources to be represented in the public catalog (Blacklight).

1. The cataloging portion of my work is mostly done outside of FOLIO. Tools provided to work within FOLIO are still clunky. There is no option to save without closing, not that "save and close" necessarily closes any given record type. I understand that limited in app cataloging functionality is a tactical decision on the part of FOLIO development, but it's a pain. 2. Acquisitions does not talk to Inventory and vice versa. Who thought this was a good idea? The values in Inventory Holdings describing whether a continuing resources is currently received, or not, are not controlled, so errors there are inevitable. 3. For serials management, the inability to predict when the next issues is likely to come, and the lack of any claiming functionality impair our ability to effectively manage our serials. 4. Reporting using dBeaver and SQL is really, really hard. There are a few people who hold the keys, and the rest of us must rely on their expertise and their having time. 5. Lack of authority control/the ability to check headings. Catalogers do their work outside of FOLIO, but it would be nice to be able to check. I don't know how changed headings will be managed, but I get the sense that that functionality isn't there. 6. Sluggish OCLC import which is glitchy. Importing or overlaying a record takes much longer that it did in Voyager. Only able to bring in what used to be referred to as the "master record" (sorry, I can't remember the new official term). 7. There are many different places a given piece of data can live across FOLIO (Instance? Holdings? Item?) creating uncertainty. Key pieces of data a buried way down the screen necessitating so very much scrolling and clicking. 8. Inability to move/edit items on records with large numbers of holdings. 9. Loss of "pick and scan" for mass removal of item records. My unit is in the middle of a massive weeding project. Staff have removed thousands of item records manually. Batch is working on a process, but it's not all the way there yet.

There are things that could be improved but i can do just about everything i need to.

The main problem I have being efficient these days is because I have to look up historical data from several different spreadsheets. I look over invoices for continuations before sending them along to be paid. Since we don't have previous Voyager data loaded into FOLIO, I often have to look up PO numbers, fund numbers, and so on from several spreadsheets where I have with this data. This workflow is complicated not only by FOLIO, but it is also due to the fact that, in the case of multiple funds, they didn't get mapped to FOLIO - I have to research what the past funds were, and what the funds now map to (due to changes in fund structures - this is not a specifically a FOLIO issue, but since it happened at the same time when we migrated it makes work harder). In the next year or so, this process will be much easier, as we will have made payments in FOLIO for most items, so this data will be stored there.

Every step requires waiting. Wait for the record to arrive from OCLC. Try to get it even if it says it is not ready. Wait for the screens to change. Go back to your search results and try to re-create where you were. Try to fix something with UNOPEN the PO. Then you try to EDIT and it says oops sorry start over. Go around the block. Try to remove DEPENDENCIES for a stupidity that folio created all by itself. MUST ACKNOWLEDGE RECEIVING NOTE cannot be checked in this latest version without going into the publication date and removing brackets and symbols--who thought of that one? is there anything obvious or intuitive about that fix? The opportunities for mistakes abound and multiply with each frustrating step.

It is too slow to use at our busy circulation desk with patrons. It's laborious to sift through too much information that is irrelevant to us. The information we need is not as easily accessible as the mountain of information we don't need. We have to click multiple times just to see if a book is available, yet all its metadata information is right at hand? Having to log in with our personal password rather than have the software open at all computers at all time hinders our work. And more.

4. What would you like to see in FOLIO that it currently doesn't have? Plea...

Predictive serials check-in Claiming of unreceived materials Bulk editing capability Ability to delete instance records Ability to open and manipulate item records when a holdings location has many hundreds of item records Ability to perform my own batch loading processes for vendor-supplied records Ability to open an individual item record (NOT the instance record it is associated with) by searching its HRID or barcode number Ability to change an item record's status from "in process" to "available" from within the Inventory app instead of having to go into the Check-in app to perform this function

Being able to delete user records, being able to search for users with an ID # (can only search by full barcode right now), more efficient printing, being able to print just new requests vs. having to print everything.

1. Significantly better performance. and 2. Functionality for authority control

I would like to eliminate some pop-ups.

1. Direct, read-only access to our data in the FOLIO DB. FOLIO supports this but apparently our contract with EBSCO does not. 2. Real progress on the open-source front, in terms of building out and supporting a community of code contributors. At the moment, one of the major bottlenecks is lack of developer resources. Thus far an overwhelming proportion of the developers have been employed by the two primary commercial vendors involved with the project. We need to shift the power dynamic and choice back towards the libraries.

Answered some of this in 3a. Additional features: options to export displayed data without having to run a DBeaver report. For example, if I have displayed all POs associated with a particular fund number, I'd like to export that from FOLIO at that time. Or, if I have displayed all fund balances for Social Sciences Team, I would like to export that data directly from FOLIO.

I just want improved speed and efficiency at the basic tasks.

See above

the white background for every single app has got to go to avoid the danger of snow blindness. We need variation in background color. Preferably the ability for users to customize backgrounds to fit their needs.

See above for reporting. In Organizations, for COUNTER stats gathering it would require fewer clicks if: URLs were clickable; the login/pw were not hidden.

Multiselect options for items. Being able to hit space bar for "okay" selections

Would like to see the issue resolved of fines transferring to the student bursar's bill and providing credits when books are returned. The automated system is very nice for lost book fines being removed. However, it needs to be tied back into the bursar's billing office so that fines do not need to be tracked manually. The check in process for books is still clunky and requires clicking buttons sometimes several times to process one book.

FIX THE PRINTING. It is a massive issue.

A better user interface. The 4-panel layout is difficult to use and requires endless clicking and scrolling back and forth and up and down and opening up and closing accordions and going back and forth between windows. It drives me mad. Even the simplest actions seem to take 10 times longer than they should. The data is broken up in such a way that makes it hard to see everything you need to see in a compact format. It's absolutely horrible. If I had one wish, it would be to ditch this format and devise a compact, easily accessible arrangement. My other wish is for Entity-Relationship diagrams for reporting, to easily and accurately see how the tables relate to each other. This would benefit anyone who is doing reporting and would save a tremendous amount of report development time, a scarce commodity for for all of us.

Simpler integration with services like Relais / BorrowDirect.

Delete our own records Reorder item records Search box more like OCLC

This is probably just being picky, but if we have a transit or pick slip, I wish that we didn't have to hit cancel so many times to make it so that we don't print so many slips.

I would like to see full data integration with all systems that we use at CUL, such as Ares and others. We should be able to report out from one single data platform.

This is pretty minor, I know, but I wish there was a way to hide applications that I don't use. There are probably others, but that's the first thing that comes to mind.

Historical circ and browse data at the item level. Historical price data for resources. The ability to move laterally through Folio instead of just "vertically", i.e. cross-linking between objects. Tagging with a controlled vocabulary.

FOLIO does not include FY21 expenditure data, which would help selectors forecast their FY22 expenses. Examining all different aspects of a book/serial/database is not easy in FOLIO. This is a design flaw that should be fixed ASAP. The naming conventions used for EBA plans and E-book packages in the 899 MARC record field should be defined in collaboration with all stake holders, among which are the selectors.

The ability to customize your "view" and have it stick.

See my answer to 3a.

I would like to see what schools the graduate students belong to. I know it is a weird one because all grad students belong to the grad school, but knowing that you are talking to a grad student in one school or another is useful.

The ability to sort columns in the Receiving app. The ability to bulk delete serial issues in the Receiving history at the bottom of the holdings records.

Reduction in the amount of clicking and mousing that is necessary particularly as related to processing requests.

Again to be able to manipulate the windows some. Like we need to be able to see the volume and year info but, there are three windows open. The search, the instance and then a 3rd with the holdings. When you click the arrow to look at the records the volume and year info is so far to the right. Even the columns in that section. Why does the "copy number" column need to be as wide as it is and why can't we make those columns smaller.

Diacritic input would be nice, and faster record imports please

I need to see all the charges to my funds live when I check the FOLIO app. I don't want to open DBEAVER which requires so many more steps. Please add all titles expended on each fund in the FINANCE or other APP.

FOLIO seems fine to me, it's the tooling around the system that is missing, and the tools we use for query that require more features.

More granular permissions for Data Import. Ability to customize, at the tenant level, which elements display and which are hidden, especially for Holdings and Item records in Inventory. Templates for creating new records of all types in Inventory.

Better integration of Inventory and Acquisitions. This is particularly important for continuations management. Don't make the staff enter the same information in multiple apps! Ability to tailor what is available in an app at the tenant level. When a data point appears in more than one area, we should be able to turn it off in an area we have chosen not to use. Ability to tailor/provide fixed values for areas that have an effective controlled vocabulary in the MARC format, e.g. receipt status. Consistent behavior and labels across apps. Better functionality to move items/holdings between instance records when large numbers of items are involved. The implemented solution works well when there are only a few items/holdings, but becomes unwieldy fast when more than a few pieces are involved. In Inventory, when you search by a data point in a segment (Holdings/Item) go to results in that segment instead of having to navigate to them. The ability to change a value across a group of records with an app. Something like Pick & Scan.

make the barcode field in an item record a required field. Right now it is possible to make an item record with a blank barcode. Disregard this request if there is a logical reason to create an item record with no barcode. However, i am not aware of any reason why that would be a good idea.

The agreements app still has some issues - attaching too many PO lines to agreement lines causes a weird error (which I'm told is in the queue to be fixed). I would also like for agreement lines to be able to be sorted alphabetically. For some of our publishers (for instance, Proquest, EBSCO), we may have over a hundred agreement lines attached to an agreement, but we are unable to sort them alphabetically. I think this is also in the pipeline to be fixed? I would like to see an expansion of the Dashboard app - right now it works with agreements and licenses, but I could see it being useful with other apps. I would also like to be able to click on a note (in the Note's helper app) and see all of the items attached to that particular note. We use some notes generically (such as "cancelled in 2021") and it would be handy to see the entire list of things cancelled in 2021 at once if I could view attached titles.

A system that behaves like it should for a large research library where many books in many formats are being ordered and received and cataloged without having to wait for the system to execute a command.

Have inventory and the receiving app speak to each other. Less clicks. Make it more functional/tailored for use by CUL staff by removing things that we do not use but remain because other institutions using FOLIO use them. It was my understanding that FOLIO would be tailored to best suit the needs of CUL.

Go from an Inventory record to PO in one click (like how ctrl+m worked in Voyager)

A streamlined version for circulation. Much faster speed. No personal login so we can switch quickly between computers without being slowed down by two step.

Predictive serials check-in Claiming of unreceived materials Bulk editing capability Ability to delete instance records Ability to open and manipulate item records when a holdings location has many hundreds of item records Ability to perform my own batch loading processes for vendor-supplied records Ability to open an individual item record (NOT the instance record it is associated with) by searching its HRID or barcode number Ability to change an item record's status from "in process" to "available" from within the Inventory app instead of having to go into the Check-in app to perform this function

Being able to delete user records, being able to search for users with an ID # (can only search by full barcode right now), more efficient printing, being able to print just new requests vs. having to print everything.

1. Significantly better performance. and 2. Functionality for authority control

Q5 - 5. Is there any kind of additional training you would like to have in order to make your job easier?
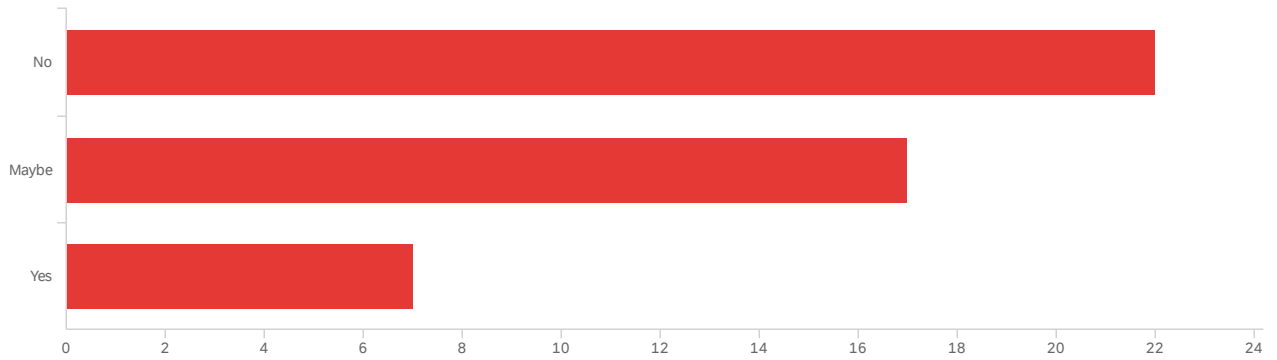
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	5. Is there any kind of additional training you would like to have in order to make your job easier?	1.00	4.00	1.77	0.85	0.72	48

#	Field	Choice Count	
1	No	47.83%	22
2	Maybe	36.96%	17
3	Yes	15.22%	7
			46

Showing rows 1 - 4 of 4

Q5_4_TEXT - If 'Maybe' or 'Yes', please explain below:

WIDGET_ERROR.ERROR

Q5a - 5a. If you answered 'Maybe' or 'Yes', please explain below.

5a. If you answered 'Maybe' or 'Yes', please explain below.

I would like to learn how to batch load records from vendors myself, instead of having to ask LTS to do it for me.

One discussion of folio I attended didn't relate much to my work and I didn't really follow it.

item records how to weed through all the information to get to what you need.

The Collection Development Continuing Education Committee is starting to develop documentation for particular CD tasks. We hope to organize training to go along with the rollout of this documentation and will need help from LTS and FInance when the time comes.

Again, think this question can be answered better as we use it more.

keep doing the drop-in FOLIO any question sessions.

But it is something that I need to set up for myself. I am glad to have the various FOLIO reporting groups, and colleagues who are generally very willing to help as time permits.

I believe having a zoom session going over tips and tricks in different areas and apps would be beneficial for everyone. Now that we have been using the system for awhile this might be a good time to review issues and work arounds. The ability to have a discussion on issues might shed light on areas that people still struggle with and be helpful for many.

There are many functional areas in FOLIO and I do not know how they works. If I could learn how other functional areas that I am not really related or uses, that would be fun.

I am still not familiar with acquisitions processes, so would benefit from more demos. This is only for helping me to construct reports, since I have nothing to do with actual acq work.

I would like to have some training on understanding broad areas such as metadata management, batch processing, and cataloguing. It will help me to better understand what report requesters need, and why they need something.

A refresher on using dBeaver and SQL reporting for selectors

Surprisingly, binding expenses show up in approved invoices reports as if they are textual resources. It would be helpful if LTS could discuss their conventions and logic for tagging expenses for serials, books, databases and other expenses that might show up in selector reports.

I think the training has been really good. My problem is taking time away from other tasks to do it.

maybe there are tips, tricks and or short cuts for things that I may not know about. Maybe little videos/ videos series of things that could be quick and easy.

Well, make me an offer

Training is not as helpful as revising the interface. It's also hard reading the screens, the important part is squished on the right. I wish the left side would be more squished.

Not sure what improvements can be made to query tools. If we get a better query tool, we might need training for it.

I probably need to learn more SQL so I can write better report queries

I'm not sure what kind of training would help with the kind of issues we are managing. If a function doesn't work well, no amount of training or expertise will make it work better.

Possibly getting together with someone in LTS who is an expert in the Receiving app.

I haven't had time to get into the reporting aspects of FOLIO, although I did the basic install a while ago. I should review some of the recordings of FOLIO reporting.

WELLNESS for the madness of working with this system.

Q6 - 6. Is there any additional documentation you need in order to better understand how to do things in FOLIO?
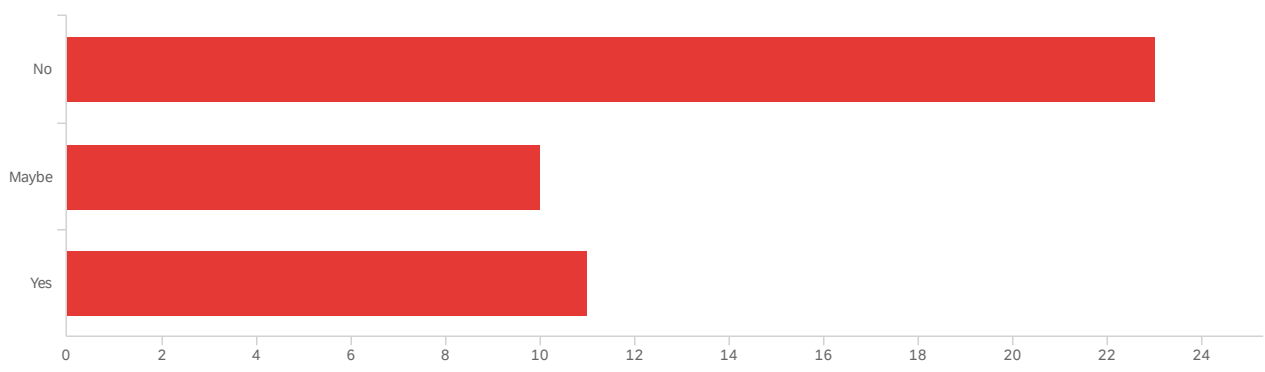
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	6. Is there any additional documentation you need in order to better understand how to do things in FOLIO?	1.00	4.00	1.83	0.94	0.88	46

#	Field		Choice Count
1	No	52.27%	23
2	Maybe	22.73%	10
3	Yes	25.00%	11
			44

Showing rows 1 - 4 of 4

Q6_4_TEXT - If 'Maybe' or 'Yes', please explain below:

WIDGET_ERROR.ERROR

Q6a - 6a. If you answered 'Maybe' or 'Yes', please explain below.

6a. If you answered 'Maybe' or 'Yes', please explain below.

The "official" FOLIO documentation at https://docs.folio.org/ is not well developed in all areas and becomes outdated rapidly. It's clear that in some areas, a great deal of effort has been made to create useful documentation, but I find documentation for FOLIO generally to be widely dispersed and difficult to locate.

Is there documentation for selectors ? I've seen reports that team leaders supply. That's all I'm aware of. Knowing how to look up fund balances would be good.

We have been asking one of the dev teams (Folijet) for detailed documentation on the flow of data when importing MARC files via Data Import, for almost a year now. https://issues.folio.org/browse/MODDATAIMP-441 https://issues.folio.org/browse/MODDATAIMP-487 https://issues.folio.org/browse/MODDATAIMP-504 They've made some progress in the new year, but this hasn't been communicated and we're unsure of the status: https://wiki.folio.org/display/DD/Flow+descriptions

As answered in 5a, Collection Development Continuing Education Committee is trying to do this, but it's slow going with all of our other responsibilities! I see that the FOLIO documentation that we get by clicking on the "?" on FOLIO toolbar is improving. I think the availability of this could be highlighted again.

There has not been any documentation. Just trial and error. Fortunately mostly trial.

not at this time. I still haven't read all the documentation we already have.

I am glad the reporting groups are working on documentation on Confluence. There needs to be more, but there is only so much people can do and still get their other work done.

I am sure there is but time constraints often prevent us from learning all FOLIO has to offer. I believe an advance training in the various apps might be useful.

I think there are enough documentation available for us. Sometimes I am not sure if I am reading the most updated one or out dated one.

E-R diagrams

I feel like I'm still learning folio in so many ways. AND, for the most part, I find it to be mostly intuitive and pretty easy to learn (for access services)

There is never enough documentation!

A layperson's glossary of terminology :)

Short (<60 seconds) how-to videos for how to perform a task or query.

It's difficult to create documentation when so much is in flux regarding the development of FOLIO. I think trying to keep better track of these changes and finding a standardized system of creating and updating CUL FOLIO documentation would be good.

I am always learning new things so I am not sure what I don't know yet.

Actual useful documentation explaining the functions of the release we are using. It seems like documentation lags behind the active release.
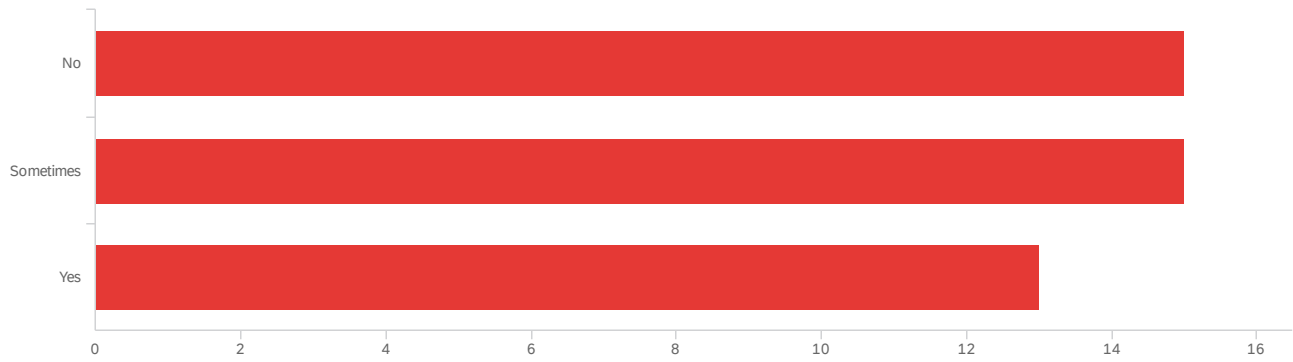
6a. If you answered 'Maybe' or 'Yes', please explain below.

We seem to have quite a bit of documentation. I would like there to be documentation for the "preferred" CUL method. For instance, LTS procedures could be folded into our old LTS procedures: https://confluence.cornell.edu/x/8YvNEg

The documentation will change with the next iteration so not sure how much to invest in this.

Have full documentation on all the steps to approve invoices and how to troubleshoot.

Q7 - 7. 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

Showing rows 1 - 4 of 4

Q7_4_TEXT - If 'Sometimes' or 'Yes', please explain below:

WIDGET_ERROR.ERROR

Q7a - 7a. If you answered 'Sometimes' or 'Yes', please explain below.

7a. If you answered 'Sometimes' or 'Yes', please explain below.

Developments in the area of data import and bulk editing (or lack thereof) have severely hampered my library's ability to get things done.

New books retaining a status of "in process" and needing to be checked in before being shelved.

Overall performance is such that the catalogers can have unacceptable wait times for records to appear.

Not sure what this means.

Many LTS procedures and workflows have been impacted with the transition to FOLIO. This was expected, having been on Voyager for nearly three decades. Our colleagues on the implementation team made a valiant attempt to identify needs, priorities and gaps, but ultimately so much of the functionality (and bug fixes) that was delivered in time for our go-live in July 2021 was beyond our control. The development schedule has slipped continuously as resources become more limited and the project has failed to make strides in building an open community of code contributors (see above). This applies to other functional areas outside of LTS as well. Please refer to the Known Issues and Statuses page on the CUL FOLIO wiki for the latest: https://confluence.cornell.edu/pages/viewpage.action?pageId=403219979

As more data gets entered by LTS and as Accounting solves FOLIO challenges (e.g. paying invoices), my job gets easier.

Acquisitions/LTS sends the process to our area.

Some data yet to be updated from Voyager; will be done as time permits. Laura D. has been excellent about sharing her knowledge of how things have changed/what still needs to be done.

This is difficult to say for sure as some of us users may not realize that other areas may be impacting our work. For example I was working on course reserves and noticed that the library catalog was not updating the information I was changing in FOLIO - temp location. Had I not been checking the library catalog and making sure it was reflecting the changes I would not know. It turned out that a manual restart of the server had to happen.

The fact that we have to discharge every book added to the collection is another form of busywork to compensate for an immature system.

FOLIO development and work occupies staff and may perhaps explain why work needed in other areas has not progressed. The situation with EBSCO records in the catalog is extremely unfortunate, impacts users and frustrates instruction and reference staff.

The migration to MetaDB means the tables will be changing and it's hard to know where this will leave us in terms of delivering needed reports.

Sometimes slow.

again, part of this is on me, I need to spend more dedicated time for serials work, then I'll get better.

"Is FOLIO work in other areas impacting your own FOLIO work?" -- I have absolutely no idea what this means.

Circulation features mentioned earlier, i.e. circ data

Because of the performance bottlenecks, sometimes activity in one functional area negatively impacts another.

LTS doesn't seem to be able to run reports and batch changes to things... Again manipulation of data possibly.

7a. If you answered 'Sometimes' or 'Yes', please explain below.

Data Import's slowness and instability impact anyone who uses Inventory.

Problems with capacity for loading records between batch and single record import have caused intermittent issues.

I am not entirely sure what this means, but, yes, I am affected by work in other areas from time to time.

there is more than one unit ordering resources and it is tough to stay on the same page all the time. there is the goodwill but not the time nor identical priorities.

Data import is much slower and clunkier than lstools+Voyager. Many more clicks to get file, upload file and import is very slow, even for small files

Working closely with LTS and Law

Q8 - 8. Which of the following best describes your current overall productivity level with FOLIO?
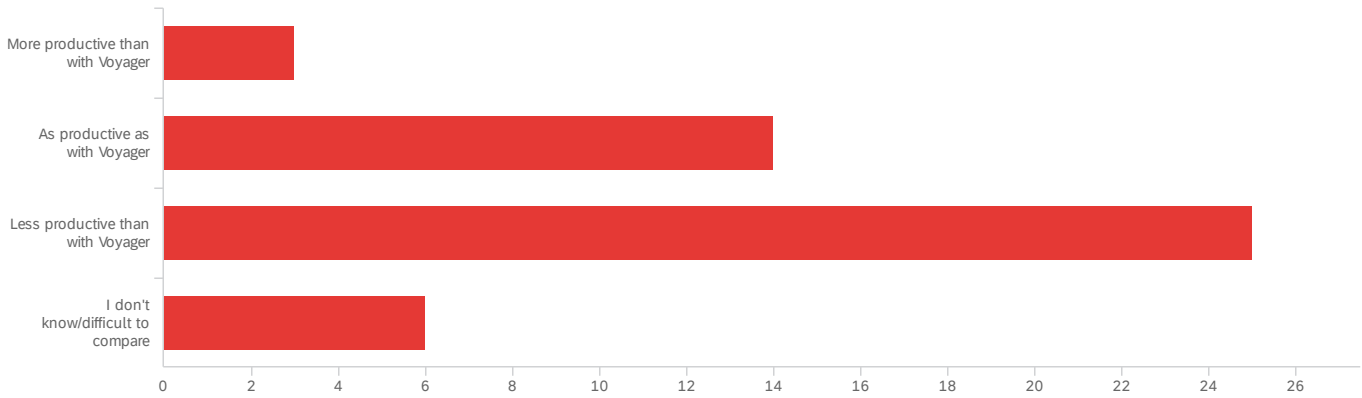
#	Field		Choice Count
1	More productive than with Voyager	6.25%	3
2	As productive as with Voyager	29.17%	14
3	Less productive than with Voyager	52.08%	25
4	I don't know/difficult to compare	12.50%	6
			48

Showing rows 1 - 5 of 5

Q8_5_TEXT - If 'more' or 'less' productive, please explain your response below:

WIDGET_ERROR.ERROR

Q8a - 8a. If you answered 'more' or 'less' productive, please explain below.

8a. If you answered 'more' or 'less' productive, please explain below.

Everything seems to be more difficult and to take more time in FOLIO than it did in Voyager. As a simple example: importing a single record from OCLC into FOLIO is not instantaneous, as it was in Voyager, and requires me to search or reload the record several times to see if the record loaded properly. Waiting for records to load is such a waste of time!

My work is not less productive but the metadata production group as-a-whole is less productive given performance issues in FOLIO, coupled with some FOLIO design issues that cause the system to be less streamlined than Voyager, which we're working to mitigate.

I knew how to search holdings information in Voyager. The voyager access reports Lydia provided met my needs.

Everything takes longer to do in Folio.

For me personally, I wasn't as closely involved with much of the day-to-day LTS operations prior to joining the FOLIO implementation efforts, so I'm primarily sharing my observations from interviewing and working alongside LTS staff. A concrete example is the many hoops that the LTS Orders team needs to jump through to receive and process ebook orders via GOBI and FOLIO.

I am less productive this fiscal year, but I am optimistic about next fiscal year.

As above: just less efficient with basic tasks.

Will take some time to create the needed queries in FOLIO, and to figure out how best to store them to share with others. A lot of work was done at the international level ahead of time, but each implementation is different, so that work had to be redone to meet local needs, and evaluating results was pretty impossible without actual data.

I am able to find further details when searching for information.

Sending PO via EDI will be implemented in a future and that would make my productivity level as same as Voyager.

See above criticisms. It was clear there was no usability testing done with real time functionality.

Because I'm still new with using Postgres SQL, and am still learning the tables and table relationships in Folio, it takes me a lot longer to create reports than it did with Voyager/Access. When we move to MetaDB, it will take even more time, because we will have to re-write all our existing queries as well as create new ones. Eventually I hope to get back up to speed, but that will take some time.

learning curve, and I knew how to check journals in with Voyager, was super easy, didn't have to input so much information

I never worked with Voyager, so I have no point of comparison.

Creating bib/holdings records in Voyager seemed MUCH more efficient on every level. Oh, and along those lines, the inability to delete bad records is a little annoying.

Already answered previously. Reporting at present is very basic, nowhere near as sophisticated as it was in Voyager.

The Fast Add feature, while less customizable, is a very helpful tool for receiving ILLs and the flexibility to change Borrow Direct records after receipt is also very helpful to me.

Voyager was a mature, fast system. FOLIO is immature and slow.

The processing of page requests takes about twice or three times as long to process however part of that is due to having multiple pickup locations and that is a good thing.

I could see the data that I needed in one window. If I needed to get data on one thing... I could go directly to that one thing. I could manipulate data easier

I explained this above. I was able to get the answers to my questions from Voyager, not so from FOLIO.

same as above, missing functionality around querying the LDP.

I feel like I spend a lot of time waiting for records to load. When I need to run a report, I spend a lot of time flailing trying to understand why something is, or is not, working. Everything is new, so we have to work out how to do each thing as it comes up and due to data points appearing in multiple (multiple) places, it's not always clear what the best procedure is. In particular, lost of the Pick and Scan function has materially impaired my unit's ability to complete a time sensitive mass withdrawal project, causing the staff significant stress.

Currently, I feel as though my work is slower, mostly because I have to look up historical data from multiple spreadsheets. In the future (a year or two out) my work in e-resources should be more efficient as FOLIO has more effective ways to track and store information about what we are purchasing or subscribing to.

less that 50%. I have heard 40% but I think less. It depends on the day but most days are not good.

Everything takes longer. Searches take longer, invoices take longer, importing records take longer. Why can't we use quotes in a title search so it is more targeted?

Easier to do everything electronically.

Q9 - 9. Is there anything else you would like to tell us?

9. Is there anything else you would like to tell us?

It's too late to do anything about this, but I wish the CUL decision-makers had taken into greater account the heavy toll the implementation of FOLIO would take on staff morale and productivity before deciding to proceed with the July 2021 implementation. Other prominent schools realized the inadequacies of FOLIO and delayed their implementations. Why did Cornell decide to proceed with the implementation of such an inadequate product, knowing the negative impact it would have on our work?

I hope that we continue to make improvements with upgrades and that the upgrades come in a timely manner without multiple setbacks.

I like Folio. There are some things that take up time that I would like to see removed.

I'm including my NetID below in case you want or need to contact me. Although the final question is phrased in such a way that makes it sound like I'm requesting to be contacted, I'm not =) Thanks for putting this together and providing us with an opportunity to be heard. - Nick

I have concerns about the impact of FOLIO on Marc record uploading to Discovery layer for resources for which we have paid (most common example is ebook packages). It is unclear to me if this is a technical issue related to FOLIO, related to EBSCO, related to individual vendors, related to CUL staffing. I would like better communication about this to CUCD and Public Services staff. Patrons look up titles and think we don't have them, but we do. We spend unnecessary time responding to these requests and of course, we are paying money to make these available to our patrons. I don't necessarily need a response, but if you have questions, this is Suzanne Cohen, sac29.

I like FOLIO so far just feel there is a big learning curve still. Since we have only been on for 6 months or so would like to compare these questions/answers a year from now.

Seems like there hasn't been enough FTE devoted to reporting, especially for start up, and that Sharon has had to spend a lot of time getting that additional help. I also understand that there isn't a dedicated developer.

FYI - I believe we are still experiencing problems with page requests sometimes not staying in the system and books routing back to their home location upon check in at the pickup location. Unfortunately, some staff are not researching this as they don't feel it's their issue but rather just following instructions and shipping books back in the shipping tubs.

Thank you for this survey. It is helpful for me.

Folio has been a great learning experience, and I'm glad I had this opportunity.

I think not, but thanks for asking.

Despite my complaints I have a lot of hope that Folio will eventually far outperform Voyager in the task areas I work in - it has great potential and we're still in the early days. I don't want any of my negative comments to be taken personally - we're building this airplane as we fly it and I'm just grateful we haven't hit the ground yet.

I mostly enjoy FOLIO, there are one or two little areas where it seriously slows down my work, but, in general, I find it a useful tool.

Hang in there everyone. It is and will continue to get better. The question is at what rate will the critical issues get fixed.

I feel pretty comfortable using FOLIO. It has been smoother than I anticipated.

Keep Going!!! Keep Pushing forward!!! I can't even begin to imagine how big of a job this is to try to make all of this work and how many different people and departments it needs to work. Thanks for listening to us !!!

9. Is there anything else you would like to tell us?

I'm reasonably happy

FOLIO is not saving me time. If the system could be improved it might.

I don't do much production work, so I'm not less productive than I was with Voyager, but I'm definitely an edge case in my unit.

I continue to feel like this project, and the decision to move to FOLIO in production, was made with insufficient consideration of the effect implementation would have on staff morale and productivity.

surveys are fine but actions are better.

It's too late to do anything about this, but I wish the CUL decision-makers had taken into greater account the heavy toll the implementation of FOLIO would take on staff morale and productivity before deciding to proceed with the July 2021 implementation. Other prominent schools realized the inadequacies of FOLIO and delayed their implementations. Why did Cornell decide to proceed with the implementation of such an inadequate product, knowing the negative impact it would have on our work?

I hope that we continue to make improvements with upgrades and that the upgrades come in a timely manner without multiple setbacks.

Q10 - Would you like us to contact you to discuss your responses? If so, please provide your netid below.

Would you like us to contact you to discuss your responses? If so, please p...

nac26

ssc48

ww83

alw3

hs269

alc28

jhp1

map6

lew235

jkm95

ejk226

jmp8

jak473 - testing

End of Report