

JANUARY folio FRIDAY



Cutover Timeline & Training Plan

- Brief Implementation Project Overview
- Cutover Timeline
- Training Plan
- Q&A

JANUARY 8TH, 10:00 AM - 11:30 AM
ZOOM

IMPLEMENTATION TEAM

- Sharon Beltaine (Reporting)
- Nick Cappadona (FOLIO/LS Tools)
- Jenn Colt (Data Migration)
- Ann Crowley (Finance)
- Laura Daniels (Metadata Management)
- Andy Horbal (Access Services)
- Debra Howell (Project Manager)
- Huda Khan (User Testing)
- Jesse Koennecke (Acquisitions; Serials Processing; Product Council Representative)
- Jason Kovari (Metadata Management; Cataloging)
- Peter McCracken (eResource Management)
- Jean Pajerek (Training)
- Phil Robinson (Infrastructure/Integrations)
- Frances Webb (Discovery)

PROJECT UPDATES

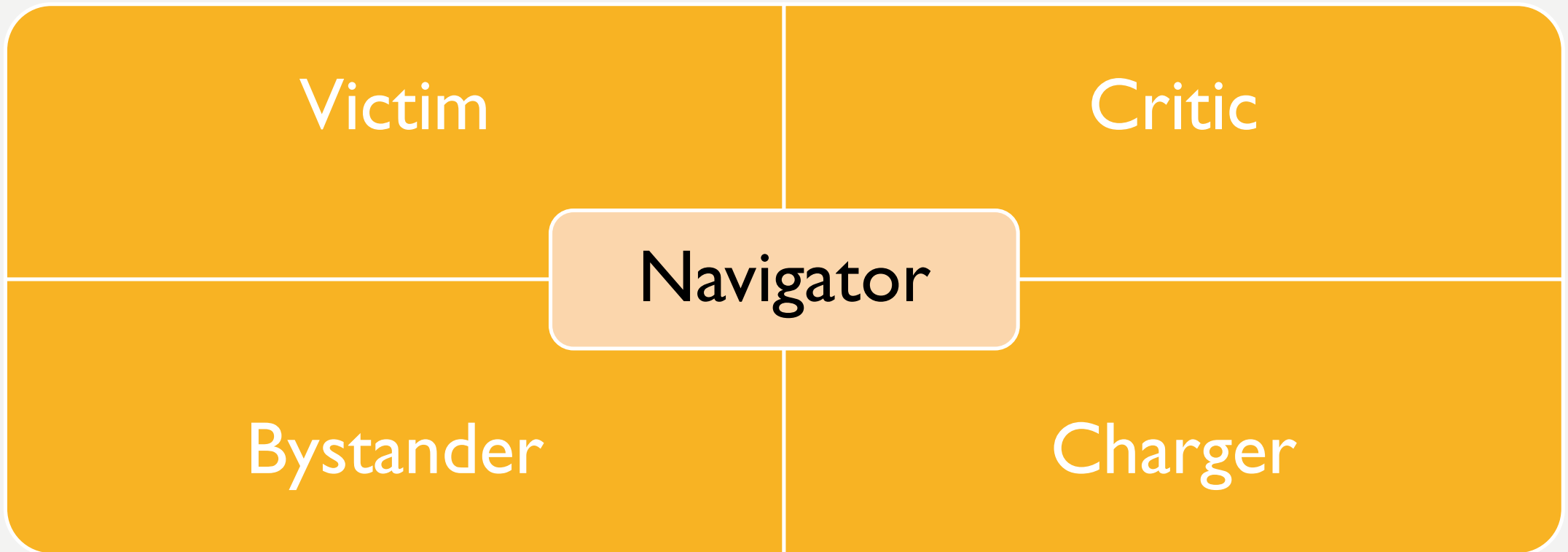
- Iris release extended to April 5
- Data Import / Export & Data Migration
- Integrations
 - The Patron Feed is running at 8 a.m. every day against Cornell-TEST
 - Kual Financial System (KFS) is next
 - BorrowDirect
 - NCIP aspects are complete
 - Z39.50 piece is in progress
 - Caiasoft in progress
 - Aeon: requirements gathering will begin in late January
- IndexData developing our OCLC connection (Jason Kovari, Laura Daniels) and it will be included in the Iris release
- CUL governance and support models in development



CUTOVER TIMELINE

[POLLEV.COM/DEBRAHOWELL672](https://pollev.com/debrahowell672)

RESPONSES TO CHANGE



CRITIC



- Looks for reasons why change will not be a success
- Fails to see any positive outcome from the change
- Sounds like:
 - This has never worked before and it won't work now.
 - They don't know what is going on or what they're doing.
 - This will just make things worse.
- **How to get unstuck:**
 - Think about the possibilities and opportunities that are (or could be) open to you: what can you do (and how should you do it) to influence change.

VICTIM



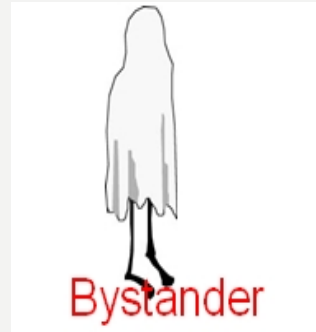
- Resists change
- Feels angry or depressed
- Reverts to old ways of doing things
- Sounds like:
 - Why is this happening to me?
 - Why can't things stay the same?
 - I just have to wait and see what “they” will do to me this time.
- **How to get unstuck:**
 - Try to move toward more; particularly taking charge and responsibility for what's happening in your life.

CHARGER



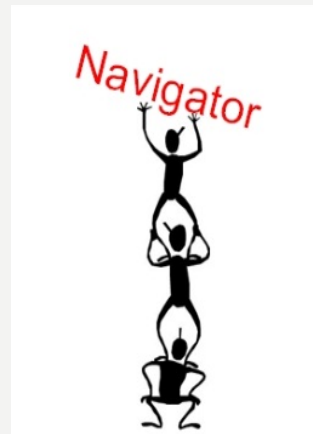
- Leaps before looking
- Pushes others too hard
- Does not listen to others
- Sounds like:
 - I know best and I'll just force it to happen.
 - I don't need more information.
 - Do it my way and do it now.
- **How to get unstuck?**
 - Examine how change impacts others, seek information, and engage additional input before making decisions.

BYSTANDER



- Acts reluctant to get involved
- Waits for others to take the lead
- Sounds like:
 - If I ignore this change, it will go away.
 - I won't jump in until I know it's safe.
 - I'll wait until others have made the decisions.
- **How to get unstuck?**
- Find out how the change impacts you.
Seek information: find out what roles you can play in change efforts.

NAVIGATOR



- It is not uncommon to react to extreme change by experiencing all of the 5 responses; even small changes will evoke one or more
- **Navigators**
 - Look for ways to reduce negative reactions
 - Explore reasons for change
 - Find ways to be useful in change
 - Look for opportunities to improve
 - Form positive and supportive relationships with those affected by the change

- **Steps to Becoming a Navigator:**
 - Know how you feel
 - Assess the impact
 - Talk with others
 - Take positive action
- Sounds like:
 - This change presents opportunities to do things differently.
 - It's a chance to do things better.
 - I'm bound to make mistakes, but I'll learn from them.
 - I am in control of how I feel about the change.

TIMELINE

	Date
Stop editing vendor records (addresses, etc.) and load them into FOLIO	June 1
Stop new acquisitions / Stop adding and updating bibliographic and holdings <ul style="list-style-type: none"> • Stop adding new orders (requires adding BIB/Holdings) – Selectors can place via POOF or other tools, but LTS will not be able to process until FOLIO goes live • Stop receiving orders (requires adding/updating BIB/holdings records) • Stop receiving approval materials (requires adding/updating BIB/holdings records) - Any shipments will be stored until FOLIO goes live • Stop serials check-in (can require updating BIB/holdings records) 	June 14
Stop adding and updating item data	June 21
Stop requests	June 21
Close books in Voyager <ul style="list-style-type: none"> • LTS can continue to process invoices until <i>June 18</i> 	June 21
Stop circulation in Voyager (use offline circ)	June 21
Re-open books / go-live in FOLIO <ul style="list-style-type: none"> • Resume all ordering/receiving/serials check-in activities as soon as we have the go ahead from Library Finance and Budget and FOLIO Implementation Team 	July 1

*** We will be able to continue some e-resource and acquisition activities between June 14 and July 1, such as license review, order communication with vendors, as long as we do not need to update Voyager. For example, some RUSH orders will be possible, but will need to be tracked separately from Voyager.*



TRAINING PLAN

DRAFTY!

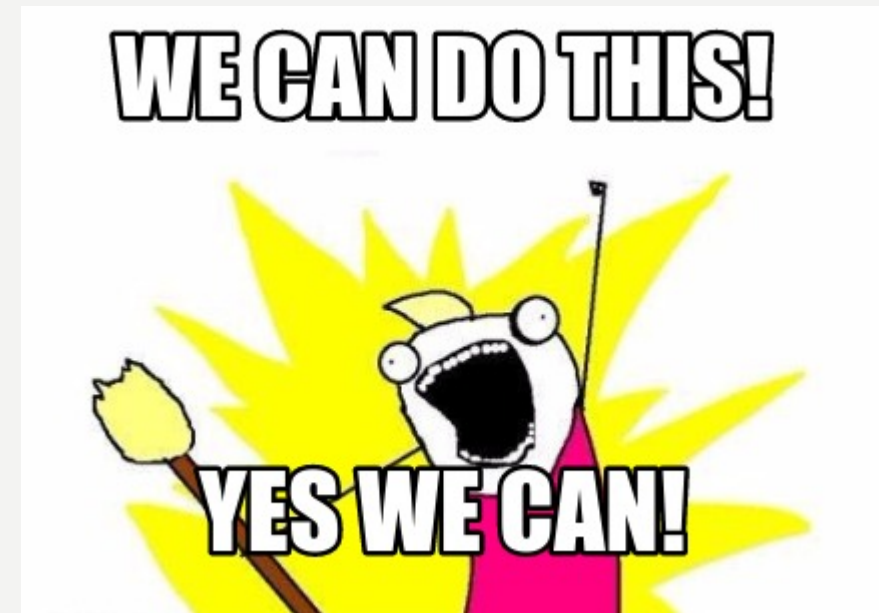
TRAINING TEAM

- Anya Arnold (EBSCO)
- Sharon Beltaine
- Amy Blumenthal
- Andy Horbal
- Debra Howell
- Jesse Koennecke
- Jean Pajerek
- Emma Raub
- Phil Robinson
- Bethany Silber
- Joy Thomas



TRAINING TIMELINE

- Team has been creating Cornell-specific Training Cases
 - over 1,000 test cases being used to customize for Cornell to use for training
 - Short how-to videos
- February
 - Honeysuckle Training instance open
- February – April 2021
 - Drop-in Zoom sessions
 - By topic/function
 - Demos, Q&A, opportunities to try things with assistance
- May – June 2021
 - Scheduled, formal training on Iris
 - By work group and/or function



TRAINING OPTIONS & RESOURCES

Knowledge
is
power!



- Confluence space in progress:
<https://confluence.cornell.edu/display/folio/Cornell+Library+FOLIO>
 - FOLIO Fridays archive
 - Explore Sessions archive
 - Training cases, resources, links
- Explore Sessions
 - For EBSCO clients
 - Most Thursdays at 2pm
- FOLIO Fridays (monthly)

FOLIO REPORTING TRAINING

Introductory training on general reporting and running reports will be offered in Spring 2021.

Report developers are invited to join our reporting user group, where they will learn more advanced FOLIO reporting techniques. Contact [Sharon Beltaine](#) to be included.

Summary of FOLIO reporting training topics:

- Introduction to FOLIO Reporting (Training) – overview of FOLIO reporting
- Running FOLIO Reports (Training) – for those who need to run canned reports
- Building FOLIO Reports (User Group) – ongoing support for those who need to develop ad hoc reports



Q & A

THANK YOU FOR ATTENDING!