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CUL FOLIO Implementation Project

Implementation Team Members

- 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 (Director/Project Manager)
- Huda Khan (User Testing)
- Jesse Koennecke (Acquisitions; Serials Processing)
- Jason Kovari (Metadata Management; Cataloging)
- Peter McCracken (eResource Management)
- Jean Pajerek (Training)
- Phil Robinson (Infrastructure /Integrations)
- Frances Webb (Discovery)

Team Collaborative spaces:

- Box: <https://cornell.box.com/v/folio-implementation-team>
- Slack: CUL Slack #folio-implementation
- GitHub: <https://github.com/cul-it/cul-folio>
- Cornell JIRA Dashboard: <https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100>

Recent Wiki Activity



Huda J. Khan

2021-09-20 updated Sep 20, 2021 • [view change](#)



Debra Howell

2021-09-20 updated Sep 20, 2021 • [view change](#)

[CUL FOLIO Implementation Project](#) updated Sep 13, 2021 • [view change](#)

2021-08-09 updated Aug 09, 2021 • [view change](#)

2021-08-02 updated Aug 02, 2021 • [view change](#)



Search Wiki

Search

Project Charter/Scope

Implement FOLIO on July 1, 2021, which includes the following activities:

- 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
- Managing the time line to insure a July 2021 implementation

CUL Staff Quick Links

- [CUL Training & Documentation Confluence site](#)
- [CUL FOLIO Friday recordings](#)
- [FOLIO YouTube recordings \(FOLIO Forums, etc.\)](#)
- [FOLIO Website](#)
- [FOLIO groups and their membership](#)
- [FOLIO Wiki](#)
- [FOLIO Special Interest Groups \(SIGs\)](#)
- [FOLIO Product Council](#)
- [FOLIO/OLE e-List Signup](#)
- [FOLIO Calendar](#)
- [FOLIO JIRA](#)
- [FOLIO Release Names](#)
- [OLE Website](#)

Meeting Notes - FOLIO Implementation Team (after 8/13 /2018)

- [2021](#)
- [2020](#)
- [2019](#)
- [2018](#)

[Proposed Topics for Future Meetings](#)

2018

2018-08-20

- Kickoff of new group.
- Discussed need to develop initial staffing estimates for LEG retreat September 10-11.

2018-08-27

- Planned how we would generate [initial staffing estimates](#) for each functional area/department.
- Agreed each rep should start working on estimates and we would meet again in two days to discuss issues.

2018-08-29

- Follow-up from 2018-08-29 meeting to see if everyone was comfortable with assignment to generate [initial staffing estimates](#).
- Deadline set for September 5 given LEG retreat is scheduled for September 10-11 and organization and review time is needed.

2018-09-05

- Walked through [initial staffing estimates](#) and agreed, while not perfect, they were a good start.
- Chris will share the estimates with Dean, for sharing with LEG.

2018-10-02

Attendees

Ann, Chris, Deb, Holly, Jason, Jesse, Mary Beth, Peter, Sharon

Regrets: Dean

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Permanent meeting time is 9:00 AM on Tuesday. On September 5 during our meeting, Dean was emailing Chris and myself asking for a timeline and resource requirements for LEG—talk about timing. 	
	OLE Board, Stakeholder & Other Updates	Dean	<ul style="list-style-type: none"> Out today. 	
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> None. 	
9:05	Old Business			
	Any response from LEG to our staffing estimates?	Dean	<ul style="list-style-type: none"> Dean out. 	
	Quick overview of what our next step	Holly	<p>(Note: Holly created a Requirements wiki page that outlines the history of CUL's requirements.)</p> <p>Per Holly's August 29 email:</p> <p><i>If you haven't done so already, please compare the original requirements here with the "Gap Analysis" features that I have loaded into a spreadsheet here. The "Gap Analysis" spreadsheet has two tabs, one is called "Current Features/Requirements" and the other "Missing Features/Requirements." If you think something is missing, please add it to the "Missing Features/Requirements." Please let me know if you think something is missing so I can pursue it right away. If you have questions about whether an existing feature includes something please ask the question as a comment to the JIRA issue—the assigned Product Owner will get back to you. If the feature is unassigned, just ask me. It might be a good idea to get a few colleagues to join in on the fun.</i></p> <p>At September 5 meeting:</p> <p><i>I offered to work with each group to work through the process outlined in my August 29th email. (BTW - No one has taken me up on my offer.)</i></p>	
9:15	New Business			

New /Additional proposed approach	Holly	<p>Per September 25 meeting:</p> <p><i>At today's OLE Steering Committee meeting Michael Bolton (from TAMU) asked if we (CUL) would be willing to work with TAMU (since we both run Voyager now) to make sure that everything Voyager does is covered by FOLIO when we go-live. I explained to Michael that not everyone who uses Voyager uses it the same way and that I prefer to look forward and determine what features do we need going forward rather than duplicating Voyager. I told Michael about our plans above and explained that I think we need to look at the broader features and determine what we are really expecting from the features. (For example, Chalmers labeled "Patron Blocks" as something they need for go-live. What they really need is a just a manual way to block a patron—not the full-blown automated blocking system most of us think of when we think of "Patron Blocks." It is just as possible that they were thinking of something else altogether.) Todd and Kirstin also remained on the call, and they also feel it would be a good idea to work together given how one university is able to play off of another. We would have a "workshop", using fees/fines as our guinea pig, to test out the process. Each institution in attendance would be focused on themselves, but walk through the process together with a facilitator.</i></p> <p>Related information:</p> <p>Would it be worthwhile to walk through each functional area (aka Epic) to determine exactly what part of each feature is needed by us for go-live, what part could wait, what part may not be needed? Would be helpful for all features—not just go-live. The Capacity Planning Group is finding this to be the current missing piece of the puzzle.</p> <p>Holly has already done this type of detail work for 3 features related to Fees/Fines in the form of questionnaires:</p> <ul style="list-style-type: none"> • Transfer of fees/fines to bursar, payroll, IRS, etc.: here • Charging of tax or vat on fees/fines: here and here • Using Collection Agencies to collect fees/fines: here <p>(Note: Holly did a questionnaire because she wanted to know exactly what every library is doing—not just what the loudest people at the RA SIG meeting that particular day thought their library did.)</p> <p>Holly also worked directly with Chalmers to identify their needs: here</p> <p>What about this scenario?</p> <ul style="list-style-type: none"> • Start with Fees/Fines as guinea pig—Deb will put together CUL group and help Holly put together a good workshop/program. • Holly has a Balsamiq file that contains details of what almost every Fee/Fine feature is about—most features already have mock-ups. Balsamiq file that contains details of what almost every Fee/Fine feature is about—most features already have mock-ups. • Holly could walk through details of each feature, with SMEs documenting what they need and when they need it. Parts of features may be needed for go-live and parts may be able to wait. Some parts of a feature might not ever be needed. • List reviewed will include all features, but those already implemented or planned for implementation this quarter won't require discussion. • Holly could walk through details of each feature, with SMEs discussing and documenting what they need and when they need it. Parts of features may be needed for go-live and parts may be able to wait—some parts may not be needed at all. • List for review will include all fee/fine features that aren't already implemented—those planned for implementation this quarter won't require much discussion. <p>Questions:</p> <ol style="list-style-type: none"> 1. How do we incorporate the review of our original requirements? 2. How do we get this done in a timely manner? <p>Plan:</p> <ol style="list-style-type: none"> 1. Start with review of our original requirements review as planned—if possible, be prepared to discuss timeline at next meeting. 2. Holly will talk to Capacity Planning Group about what should be done next <ol style="list-style-type: none"> a. This type of activity takes a lot of time, so we only want to do this if absolutely necessary b. Do detail view of features if capacity planning shows July 2020 completion date questionable c. Would take too much time to do detail work for each feature 	<p>Everyone: Prepare for requirements review—will discuss timeline at next meeting.</p> <p>Holly: Talk to Capacity Planning Group about need for detailed exercise.</p> <p>Holly: Tell OLE SC status of this plan.</p>
12:55	Anything else?		
	Holly	<ul style="list-style-type: none"> • We will have a place to list future topics for meetings. 	Holly: Set up place for placing future topics.
	Jason	<ul style="list-style-type: none"> • Reminder to set up recurring meetings. 	Holly: Set up recurring 9:00 AM Tuesday meetings.

2018-10-09

Attendees

Ann, Chris, Deb, Holly, Jason, Sharon

Regrets: Dean, Mary Beth, Jesse, Peter

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> LEG wants to meet with our group <ul style="list-style-type: none"> Scheduled for November 14th--Jason will be out but is sending Sarah Ross Won't be a formal presentation--more of an information discussion Dean will provide us with some of the questions they have in advance 	<ul style="list-style-type: none"> Ask Dean when joint announcement is going out about delayed implementation? (Chris emailed Dean today)
	OLE Board, Stakeholder & Other Updates	Dean (not here)	<ul style="list-style-type: none"> Any response from LEG to our staffing estimates? Any further information about Index Data's status on project? 	<ul style="list-style-type: none"> Save for next meeting.
9:10	Old Business			
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> Holly: Set up place for placing future topics. See Topics for Future Meetings. Holly: Set up recurring 9:00 AM Tuesday meetings. Done--rooms will be added later. Everyone: Prepare for requirements review--will discuss timeline at next meeting. Will discuss below. Holly: Talk to Capacity Planning Group about need for detailed exercise. Holly only told Cate about it--will discuss at next CPG meeting. Holly: Tell OLE SC members (Michael B., Kirstin, and Tod) Cornell's thoughts on workshop idea. Holly has emailed group--no response back yet. 	
	Any other old businesses?	Holly	<p>Per our October 2 meeting:</p> <ul style="list-style-type: none"> We have agreed to continue on with our plan to compare our original functional requirements (from 2015) with the FOLIO features identified as needed by CUL earlier this year. I have created a wiki page for us to record our work on. Everyone had assignment to start preparing for the requirements review so we could discuss it at today's meeting. 	<ul style="list-style-type: none"> Let Holly know if she can help in any way during this process.
9:40	New Business			
	Implementation Planning	Holly	<p>What's next?</p> <ul style="list-style-type: none"> We need to get back to the Implementation Plan. <ul style="list-style-type: none"> So far we have developed the start of a list of tasks--this needs to be completed and turned into an Implementation plan. This has been held up because one critical piece of information is missing: When will we have what we need from FOLIO? We need to know when our go-live features will be ready so that we can plan our implementation date, but also so that we can plan when we will be able to test certain parts of FOLIO. <i>(Note: The Capacity Planning Group is gearing up to rerun the Capacity Planning Spreadsheet with the latest data (e.g. new 2019 staffing, new features that have been prioritized and estimated, etc.) After the rerun, we should know what will be released in Q1, Q2, Q3, and Q4 of 2019.)</i> I talked to Dean about this and he said it would be helpful now to have ballpark estimates for: <ul style="list-style-type: none"> Programming integration with other systems Migration of data Training of staff on FOLIO Perhaps we could work on this first? By the time we are done the new Capacity Planning Spreadsheet should be ready. To clarify, cannot finish implementation plan (i.e. assign actual dates) without knowing for sure when software will be available. We can continue on with task list. 	<ul style="list-style-type: none"> Holly will produce a template to be used in developing the implementation plans for each functional area.
	Any other new businesses?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings. 	

2018-10-30

Attendees

Ann, Chris, Deb, Holly, Jesse, Mary Beth, Peter, Sharon, Simeon

Regrets: Dean, Jason

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Planning is underway to have a WOLFcon May 1-3, 2019—we don't know who will need to attend at this point, or even where it will be held LEG needs financial projects by November 14th: <i>"We need to understand the current estimated cost for development, implementation and ongoing maintenance for Folio."</i> Simeon is stepping in for Chris 	
HOLD	OLE Board, Stakeholder & Other Updates	Dean	<ul style="list-style-type: none"> When is announcement going out about our delayed implementation of FOLIO? Any response from LEG to our staffing estimates? Any further information about Index Data's status on project? More info on Gerald taking over for Dean on OLE Board? 	<ul style="list-style-type: none"> Will have to wait for next meeting when Dean is in attendance
9:10	Old Business			
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> Chris: Ask Dean when joint announcement is going out about delayed implementation? (Chris emailed Dean on 10/9—added to agenda above) Holly: Save Dean's agenda items for next meeting (see above) Everyone: Let Holly know if she can help in any way during the requirements review process Holly: Produce a template to be used in developing the implementation plans for each functional area (in-progress) 	<ul style="list-style-type: none"> Holly will bug Mike about announcement (emailed Mike on 11/1/2018) Holly will ask Dean where LEG questions are (emailed Dean on 11/1/2018)
	What do we need from Chris before he leaves CUL?	Everyone	<ul style="list-style-type: none"> Tasks for Chris <ul style="list-style-type: none"> Review and update first draft of implementation plan—look at all tabs, thinking about integrations, building FOLIO, monitoring FOLIO, decommissioning Voyager, etc. Review projections that will be created shortly Share any general documents, thoughts, ideas, concerns, etc. not previously shared (aka brain dump), especially in regard to User Management and Sys Ops and Mgt Tasks for us <ul style="list-style-type: none"> CUL replacement on User Management SIG (Deb will be interim Cornell rep—Chris might be able to join specific calls) CUL replacement on Sys Ops and Mgt SIG (Greg has been involved and Robbie will be joining too) New lead for OLE Early Implementers Group (Holly will work on this) New convener for User Management SIG (PC needs to take care of this) 	
	Compare CUL's Requirements to FOLIO Features	Everyone	<ul style="list-style-type: none"> What is status of each area? <ul style="list-style-type: none"> Sharon Beltaine (Reporting)—old requirements are a nice overview; there was a gap in the Annex insurance reporting; investigating import/export to make sure it's covered Ann Crowley (Finance)—Not sure what is covered because still in development; what is described in JIRA is not what is being developed; for this exercise we need to assume that JIRA is correct and compare with JIRA Jesse Koennecke (Acquisitions; Serials Processing)—planning approach Jason Kovari (Metadata Management; Cataloging)—planning approach Deb Lamb (Resource Access)—Comfortable that everything is covered except for ARES, which may not be covered in 2020 Peter McCracken (eResource Management)—planning approach Chris Manly (Infrastructure)—moving in right direction Mary Beth Martini-Lyons (Discovery) 	<ul style="list-style-type: none"> LTS will continue on with process and let Holly know if they need help.
	Draft Implementation Tasks/Template	Holly	<ul style="list-style-type: none"> Review what has been created so far 	<ul style="list-style-type: none"> Everyone send Holly comments about format, what's missing, etc. (remember, it's not done yet)
	Any other old business?	Anyone		
9:50	New Business			
DIDN'T GET TO	Any other new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings 	

2018-11-06

Attendees

Ann, Chris, Dean, Deb, Holly, Jason, Mary Beth, Peter, Sharon, Simeon

Regrets: Jesse

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> None 	
	OLE Board, Stakeholder & Other Updates	Dean	<ul style="list-style-type: none"> When is announcement going out about our delayed implementation of FOLIO? (Holly has asked Mike Winkler) Any response from LEG to our staffing estimates? Have asked for detailed estimates, which will be provided next week Any further information about Index Data's status on project? No change in plan--7 or 9 people staying on More info on Gerald taking over for Dean on OLE Board? When Dean leaves end of January 	<ul style="list-style-type: none"> Dean will ask about announcement at OLE Board meeting today
9:10	Old Business			
	Action Items from Last Meeting	Holly	<p>GENERAL</p> <ul style="list-style-type: none"> Holly: Save Dean's agenda items for next meeting (see above) Holly: Will bug Mike about announcement (emailed Mike on 11/1/2018) Holly: Will ask Dean where LEG questions are (emailed questions to group on 11/1/2018) LTS: Will continue on with requirements review process and let Holly know if they need help--they have set deadline of November 9 Everyone: Send Holly comments about Draft Implementation Tasks/Template format, what's missing, etc. (remember, it's not done yet) <p>CHRIS TRANSITION</p> <ul style="list-style-type: none"> Chris: Help onboard Deb as interim Cornell rep on User Management SIG--DONE Chris: Help onboard Robbie to Sys Ops and Mgt SIG (Greg is already there)--DONE Holly: Identify new lead for OLE Early Implementers Group Jesse: Work with PC to identify new convener for User Management SIG ASAP Chris: Review and update Draft Implementation Tasks/Template for building FOLIO server, updating integrations, testing, monitoring FOLIO, decommissioning Voyager, etc. Chris: Review and provide projections Everyone: Identify tasks Chris needs to complete before leaving project 	<ul style="list-style-type: none"> Holly needs to update project documents to reflect new roles for Deb, Greg, and Robbie Holly needs to add Simeon to team e-list and give him wiki edit rights Everyone needs to identify tasks Chris needs to complete before leaving project
SKIP FOR NOW	Draft Implementation Tasks/Template	Holly	<ul style="list-style-type: none"> No further progress made due to new projections assignment Will come back to this if there is time after New Business 	
SKIP FOR NOW	Any other old business?	Anyone		
9:15	New Business			
MAIN PURPOSE OF MEETING	Preparation for LEG meeting	Holly/All	<p>FOLIO questions from LEG</p> <p>Handouts available before meeting</p> <ul style="list-style-type: none"> Revised budget (includes staffing for implementation and development, OLE dues, server costs, training, etc.) Contingency budget (not sure what is meant by this--we won't have time to do everything else plus this) Org Chart (Holly will start this and then get input--need clarification of role of functional project lead first) Feature Status/Missing Features (Holly will produce something similar to this) Overview of Agile Development Methodology (Holly will produce something similar to this, but in document form explaining lack of plan and requirements documents with FOLIO) 	
SKIP FOR NOW	Any other new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings 	

2018-11-13

Attendees

Ann, Chris, Dean, Deb, Holly, Jesse, Mary Beth, Peter, Sharon, Simeon

Regrets: Jason

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> None 	
	Senior Management Updates	Dean	<ul style="list-style-type: none"> None 	
9:05	Old Business			
	Action Items from Last Meeting	Holly	<p>GENERAL</p> <ul style="list-style-type: none"> Dean: Will ask about delay announcement at OLE Board meeting on 11/06/18 meeting (DONE--Dean emailed us) Holly: Needs to update project documents to reflect new roles for Deb, Greg, and Robbie Holly: Needs to add Simeon to team e-list and give him wiki edit rights (DONE) LTS: Will continue on with requirements review process and let Holly know if they need help—they have set deadline of November 9 Everyone: Send Holly comments about Draft Implementation Tasks/Template format, what's missing, etc. (remember, it's not done yet) <p>CHRIS TRANSITION</p> <ul style="list-style-type: none"> Holly: Identify new lead for OLE Early Implementers Group PC: Identify new convener for User Management SIG ASAP (Paula has taken this on) Chris: Review and update Draft Implementation Tasks/Template for building FOLIO server, updating integrations, testing, monitoring FOLIO, decommissioning Voyager, etc. Chris: Review and provide projections (DONE) Everyone: Identify tasks Chris needs to complete before leaving project 	
	Preparation for LEG meeting	Holly/All	<p>FOLIO questions from LEG</p> <p>Handouts available before meeting</p> <ul style="list-style-type: none"> Revised budget (includes staffing for implementation and development, OLE dues, server costs, training, etc.)—<i>note that there are three tabs</i> Contingency budget (not sure what is meant by this—we won't have time to do everything else plus this) Org Chart (will do this after issue of third lead discussed) Feature Status/Missing Features (including overview of Agile development methodology)—<i>see last page of this document for list of links being provided to LEG</i> 	
	Draft Implementation Tasks/Template	Holly	<ul style="list-style-type: none"> No further progress made due to new projections assignment and other preparations for LEG meeting—Holly will get back to this now 	
	Any other old business?	Anyone		
9:55	New Business			
	Any new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings 	

2018-11-27

Attendees

Ann, Dean, Deb, Holly, Jesse, Mary Beth, Peter, Sharon

Regrets: Jason, Simeon

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> New CUL-FOLIO-DEVELOPMENT-L e-list is available (I sent email on 11/20) WOLFcon may be on University of Chicago campus due to costs elsewhere--date still May 1-3 (following week is Linked Data meeting--FOLIO metadata folks will be there) 	
	Senior Management Updates	Dean	<ul style="list-style-type: none"> OLE Board Executive Group meets today at noon 	
9:05	Old Business			
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> PC: Identify new convener for User Management SIG ASAP (<i>Maura Byrne from Chicago has taken over</i>) Holly: Identify new lead for OLE Early Implementers Group 	
	Who is doing what on the FOLIO project?	Holly	<ul style="list-style-type: none"> Please update your Roles and Areas of Knowledge/Responsibility This is the page that our CUL colleagues will use to find out who to go to with what type of questions 	
	LEG Meeting Followup	Holly /Jesse/All	<p><i>Action Items from email Holly sent on 11/14/2018...</i></p> <p>Jesse: Have a separate meeting of people working on development of FOLIO, as suggested today? Since the focus is on FOLIO as a product, and Jesse is our PC rep, perhaps he could coordinate this meeting? (Jesse, do you mind?) Each week (or whenever) we could have a different attendee talk more in depth about what their group is working on. I would definitely find that interesting. We could open this up to anyone working on development (all SIG people, like Joanne, Wendy, Sarah, Jenn, etc., devs, POs, etc.). Thoughts?</p> <p>Jesse: Take Usability testing issue to PC and invite Darcy to join meeting for discussion. Perhaps we can use the CUL Usability Team for the FOLIO project as a whole, like Colorado is using their accessibility lab for the FOLIO project? Darcy, is there someone on the FOLIO project to talk to about this first, so they don't get upset that we are going around them?</p> <p>Holly: Update Risk Register to switch from OLE to FOLIO project--add risks/worries/concerns mentioned at meeting today. Also update other Project Documents on wiki. I've been meaning to do this for some time and plan on doing so this week or over the weekend.</p> <p>Holly: Either become full-time implementation Project Manager or take more of a consulting role to actual implementation Project Manager. I became a PMI Certified Project Management Professional for this purpose, but I really like being a FOLIO Product Owner. (Holly has meeting with Dean tomorrow.)</p> <p>Other issues:</p> <ul style="list-style-type: none"> Why don't we have our own instance? Robbie is working on this, following the TAMU model. 	<ul style="list-style-type: none"> Jesse will look at hosting FOLIO First Fridays after December. Jesse will talk to Jenn to see if FFF will meet her information needs. Holly will start generating FOLIO implementation status reports (talk to Gerald and Zsuzsa first). Dean will ask Mike about creating a monthly FOLIO app status report. Jesse will raise usability issue with PC Executive Committee at meeting tomorrow. Ask Simeon to include Robbie /Greg to this meeting while setting up FOLIO instance.
	Request for Examples of Dev-Driven SIGs (due November 26th--if possible)	Holly/All	<p><i>From email Holly sent to CUL MM and RM SIG members on 11/15/2018...</i></p> <p>We are looking for specific current examples showing that development of MM and RM apps is driven by product owners/developers rather than SMEs on the SIG. This is contrary to FOLIO's official adoption of a user-driven, design-first approach to development. As an example, here are steps taken by RA SIG:</p> <ol style="list-style-type: none"> Product Owner selects the next feature to be worked on based on its priority from the ranking exercise (aka "Gap Analysis") Product Owner reviews the current environment (what do current systems do?) and brings ideas to SIG in the form of a basic mock-up--sometimes this is a new mock-up and other times there will be changes to existing pages/screens Product Owner and SIG work together to further define the page and business logic Product Owner creates a JIRA issue for the UX/UI Designer to take the basic mock-up and generate a design (that considers FOLIO's design "rules", etc.) UX/UI Designer and Product Owner discuss the design and go back to SIG as needed Product Owner creates a JIRA issue for the Developer in the form of a User Story Product Owner answers questions from the Developer and goes back to the SIG as needed <p>Please note that the Developer doesn't get involved until Step #6, after the SIG has defined exactly what they want, and that the Product Owner coordinates collecting information about what the SMEs want and passing that information on to the Developer--they don't make decisions.</p> <p>If this isn't the approach your SIG uses, please let Holly know the approach that is being used. The MM SIG started off looking at a product @cult already developed, which makes sense, but hopefully @cult has listened to the SIG's comments and suggestions. If not, we need to know that.</p> <p>Paula said she would let the MM and RM SIG conveners know that Cornell, TAMU, and Lehigh are doing this. Please don't say anything outside of our group in case that hasn't happened yet.</p>	
	LTS Requirements Review	Jesse /Jason	Jenn sent an email to Jason and Holly on 11/9/2019 indicating that the cataloging and authorities portions were done and that she thought Sarah and Gary were finished as well. What is left to do? Link from Jenn	
	Draft Implementation Tasks/Template	Holly	No further progress made due to new projections assignment and other preparations for LEG meeting--Holly will get back to this now	
	Any other old business?	Anyone		
9:55	New Business			

	Formalize staff needs	Everyone	Use original spreadsheet .	<ul style="list-style-type: none"> • Everyone needs to formalize staffing needs.
	Any new business?	Holly	Look at proposed topics for future meetings	

2018-12-11

Attendees

Ann, Deb, Holly, Jason, Jesse, Sharon

Regrets: Dean, Mary Beth, Simeon, Peter

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Presented Capacity Planning results to Product Council last week. Show results of research to see which institution might be best to implement next. 	
	Senior Management Updates	Dean	<ul style="list-style-type: none"> He is at CNI. 	
9:10	Old Business			
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> Everyone: Formalize staffing needs using original spreadsheet by January 25. Everyone: Update Who is doing what on the FOLIO project? Jesse: Will look at hosting FOLIO First Fridays after December.--Open to this. Jesse: Will talk to Jenn to see if FFF will meet her information needs.--Not done yet. Jesse: Will raise usability issue with PC Executive Committee.--Collecting info then will bring up at PC meeting. Dean: Will ask Mike about creating a monthly FOLIO app status report.--Done! The OLE Board has asked that we (Mike, Ginny, Holly) create a monthly newsletter to the OLE Community and approved this format--first one goes out January 8th). Simeon: Include Robbie/Greg in this meeting while setting up FOLIO instance? Holly: Will talk to Gerald and Zsuzsa about generating a monthly FOLIO implementation status report.--we can send link to monthly OLE Community newsletter along with CUL-specific highlights. Holly: Identify new lead for OLE Early Implementers Group. 	<ul style="list-style-type: none"> We need more info from Dean as to what LEG needs re: staffing info (Holly) Could we pay EBSCO to set up a sandbox for us? (Holly will ask Dean) What would it cost for EBSCO to host us? (Holly will talk to EBSCO--or should we wait for new Chris?) Ask PC about End User Documentation again (Holly)
	Draft Implementation Tasks/Template	Holly	<ul style="list-style-type: none"> Review list of tasks in each tab. Holly will expand on task lists after we generally agree on draft list. Task list will be turned into an implementation plan. Will be updated continuously--tasks will be broken down, added, etc. 	<ul style="list-style-type: none"> Review Draft Implementation Tasks /Template (everyone)
	Any other old business?	Anyone		
9:50	New Business			
Ran out of time	Will FOLIO Courses meet CUL's needs?	Holly /Deb	<ul style="list-style-type: none"> See courses features (which all have Umbrella task UXPROD-15: Place item on reserve). There is an Umbrella task of UXPROD-561: Reserve management integration, e.g. Ares 	<ul style="list-style-type: none"> We didn't get to this, but Deb will review this and let Holly know
Ran out of time	Data Loader Requirements	Sharon	<p>-see initial Data Loader Requirements notes; does this cover CUL's needs?</p> <p>-see UXPROD 850 Data Migration epic</p>	<ul style="list-style-type: none"> We didn't have time to get to this, so Sharon will send out an email about data loader requirements
	Any new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings. 	

2018-12-18

Attendees

Ann, Dean, Deb, Holly, Jason, Jesse, Peter, Sharon

Regrets: Simeon, Mary Beth

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> None. 	
	Senior Management Updates	Dean	<ul style="list-style-type: none"> Virtual stakeholders meeting January 15th—Gerald and Dean will both attend. OLE hiring full-time DevOps/SysOps person to assist OLE sites in bringing up a FOLIO instance. 	
9:10	Old Business			
	Action Items from Last Meeting	Holly	<p>OLD ACTION ITEMS</p> <ul style="list-style-type: none"> Jesse: Will host FOLIO First Fridays starting in January. Jesse: Has raised usability testing issue with PC Executive Committee—they are collecting info before bring issue to PC. Holly: Will talk to Gerald and Zsuzsa about forwarding monthly OLE Community Newsletter to CUL (starting mid-January) along with CUL-specific update. Simeon: Include Robbie/Greg in this meeting while setting up FOLIO instance? Holly: Will identify new lead for OLE Early Implementers Group. <p>LAST WEEK'S ACTION ITEMS</p> <ul style="list-style-type: none"> Everyone: Review Draft Implementation Tasks/Template (if adding or changing anything, add comment) and make changes by January 31.—Any questions? Holly: We need more info from Dean as to what LEG needs re: staffing info.—See separate item below. Holly: Ask Dean if we could pay EBSCO to set up a sandbox for us?—No, EBSCO's focus is w/ integrating w/ own stuff and in their hosting environment; better to work with the Germans or TAMU. Holly: What would it cost for EBSCO to host us? Holly will talk to EBSCO—or should we wait for new Chris?—Don't wait; Holly has contacted EBSCO (Nancy Grimaldi <NGrimaldi@EBSCO.COM>). Holly: Ask PC about End User Documentation again. 	
	Data Loader Requirements (was on agenda for last meeting but ran out of time)	Sharon	<ul style="list-style-type: none"> See initial Data Loader Requirements notes; does this cover CUL's needs? See UXPROD 850 Data Migration epic. See Migration Loaders document from Ingolf 	
	Staffing Details for LEG	Holly	<ul style="list-style-type: none"> Holly has added a new tab called "Staffing Details" to the original projections spreadsheet. This new tab lists the backfill and new positions previously identified. Please fill in the columns for the needed positions. Also add/modify/delete positions as needed. Priorities: <ol style="list-style-type: none"> Identify staffing needs Identify FTE level across length of project Identify how work could get done Describe position that needs to be filled Document what happens if position is not filled or not fully filled At our last meeting we set a due date of January 25 to accommodate Simeon's return, but LEG doesn't want to wait that long. How about these dates? <ul style="list-style-type: none"> January 10 - more refined staff details (presented to LEG as a "work in progress") January 25 - finalized staff details 	
Skipped this	Any other old business?	Anyone		
9:50	New Business			
	Project Kick-Off	Holly	<ul style="list-style-type: none"> Sharon recommended having a "project kickoff." We could invite Gerald to discuss his support of FOLIO and its priority at CUL. Have this when the sandbox is ready. 	
Skipped this	Any new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings. 	

2019


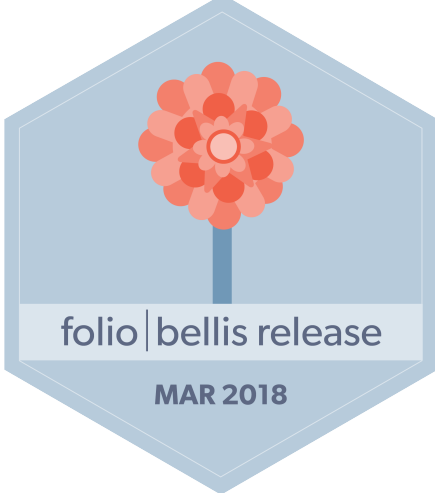
2019-01-08

Attendees

Ann, Dean, Holly, Jason, Jesse, Peter, Sharon, Simeon

Regrets: Deb, Mary Beth

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> WOLFcon postponed until late 2019 or possible 2020 May 1-3 will be used instead for FOLIO meetings in Boston New Aster (Q4 2018) and Bellis (Q1 2019) release badges are now available...  	
	Senior Management Updates	Dean	<ul style="list-style-type: none"> Virtual stakeholders meeting January 15th—Gerald and Dean will both attend OLE hiring full-time DevOps/SysOps person to assist OLE sites in bringing up a FOLIO instance OLE Board Executive meeting today at noon—more news next week 	
9:10	Old Business			

	Action Items from Last Meeting	Holly	<p>OLD ACTION ITEMS</p> <ul style="list-style-type: none"> • Jesse: Will host FOLIO First Fridays starting in January • Jesse: Has raised usability testing issue with PC Executive Committee—they are collecting info before bring issue to PC • Holly: Will talk to Gerald and Zsuzsa about forwarding monthly OLE Community Newsletter to CUL (starting mid-January) along with CUL-specific update • Simeon: Have Robbie attend this meeting while setting up FOLIO sandbox? Or attend one meeting? (Robbie will attend January 29 or February 5 meeting, depending on when sandbox is ready) • Holly: Will identify new lead for OLE Early Implementers Group • Holly: Ask PC about End User Documentation again • Sharon?: Plan project kickoff when sandbox is ready <p>LAST WEEK'S ACTION ITEMS</p> <ul style="list-style-type: none"> • Everyone: Complete more refined Staffing Details for LEG by January 11 (with final details due January 25) • Everyone: Review Draft Implementation Tasks/Template and make changes by January 31 (if adding or changing anything, indicate this in comment column) 	
	Staffing Details for LEG	Holly	<ul style="list-style-type: none"> • "Staffing Details" tab lists the backfill and new positions previously identified • Please fill in the columns for the needed positions • Also add/modify/delete positions as needed • Priorities: <ol style="list-style-type: none"> 1. Identify staffing needs 2. Identify FTE level across length of project 3. Identify how work could get done 4. Describe position that needs to be filled 5. Document what happens if position is not filled or not fully filled • Due dates: <ul style="list-style-type: none"> • January 11 - more refined staff details (presented to LEG as a "work in progress") • January 25 - "finalized" staff details 	
	Draft Implementation on Tasks /Template	Holly	<ul style="list-style-type: none"> • Review by end of January, when Holly will turn the task list into a project plan • Holly is happy to meet with functional areas individually to assist in developing the task list for that area • You can ignore the first 35 rows of the "Planning" tab, which are tasks for project management plans and documents that Holly will be updating due to the switch from OLE to FOLIO--after the updates are made Holly will review the plans/documents with the group as she did when they were originally created. • Changes will be made to project plan after January 31 	<ul style="list-style-type: none"> • Holly will review updated project plans/documents with team • Everyone should let Holly know if they need help reviewing and updating the task list
	Any other old business?	Anyone	<ul style="list-style-type: none"> • None 	
9:30	New Business			
	CUL FOLIO Sandbox	Simeon	<ul style="list-style-type: none"> • Q2 2018 is up now--will upgrade to Q4 2018 by end of January • What do we want to do? <ul style="list-style-type: none"> • Ultimately want to make sandbox available for anyone in CUL to play with--will do project kickoff when it is available • We want to start by testing data migration using CUL data (Sharon) • Then everyone will play with interface and see what's there • Specifics to check out <ul style="list-style-type: none"> • See how fund structure could be modified in FOLIO (Ann) • Answer data entry questions by actually trying functions (Jason) • Test after we decide what to use as a knowledge base (Peter) • Test what needs to be done in cleanup if we change holdings format (Jason) • Introduce Access Services staff to FOLIO features and consider workflow changes (Holly) • Identify what data needs to be made available to patron interface and how it will replace Voyager data (Holly) • Robbie will attend January 29/February 5 meeting • Consider spinning up more than one sandbox 	
	EBSCO Hosting Services Meeting	Holly	<ul style="list-style-type: none"> • EBSCO visiting us afternoon of January 23rd to discuss hosting services • All are welcome--let me know if I should add your name to the calendar appointment (already invited: Dean, Simeon, Chris, Greg, Robbie, Jesse, Sharon) • Starts at 1:00 PM in Olin Library Room 703 • What should we ask about? (Questions should be documented here) <ul style="list-style-type: none"> • Access to data--what limits would we have? • Various options available without full hosting • Level of service 	<ul style="list-style-type: none"> • Holly will start a Google Doc for this (it's available here)
	OLE Partner Implementation Survey	Holly	<ul style="list-style-type: none"> • Will be surveying OLE partners to find out when folks are planning to implement and how • Results will be recorded here • Any questions you would like for me to include? 	<ul style="list-style-type: none"> • Everyone should let Holly know if they think of anything
	Any new business?	Holly	<ul style="list-style-type: none"> • Look at proposed topics for future meetings 	

2019-01-15

Attendees

Ann, Dean, Deb, Holly, Jason, Jesse, Sharon, Simeon

Regrets: Mary Beth, Peter

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Final test and bug fixing for Aster release (aka Q4) ended January 11 (Friday). 	<ul style="list-style-type: none"> Holly will notify everyone when Aster release is ready
	Senior Management Updates	Dean	<ul style="list-style-type: none"> FOLIO Stakeholders Meeting starts at 10:30 AM today. Will discuss Sys Ops community group, WOLFcon, May 1-3 FOLIO meeting at EBSCO, Roadmap ownership, support of transitioning libraries while development is going on, etc. Next Tuesday we will have a report on these topics. 	
9:10	Old Business			
	Action Items from Last Meeting	Holly	<p>OLD ACTION ITEMS</p> <ul style="list-style-type: none"> Jesse: Will host FOLIO First Fridays starting on February 1 when we do round robin of updates Jesse: Has raised usability testing issue with PC Executive Committee—they are collecting info before bring issue to PC Holly: Will talk to Gerald and Zsuzsa about forwarding monthly OLE Community Newsletter to CUL (starting mid-January) along with CUL-specific update Holly: Ask PC about End User Documentation again Sharon/TBD: Plan project kickoff when sandbox is ready <p>LAST WEEK'S ACTION ITEMS</p> <ul style="list-style-type: none"> Everyone: Complete more refined Staffing Details for LEG by January 11 (with final details due January 25) Everyone: Review Draft Implementation Tasks/Template and make changes by January 31 (if adding or changing anything, indicate this in comment column)—Holly is available to meet with team to help Everyone: Add questions you have for EBSCO to list here Everyone: Add questions you have for OLE partner implementation survey here Everyone: Add to list of what we will use sandbox for here Holly: Update Project Management Plan/Project Documents and review with team Robbie: Bring up FOLIO sandbox by end of January (attending meeting January 29/February 5) 	
	Staffing Details for LEG	Holly	<ul style="list-style-type: none"> "Staffing Details" tab lists the backfill and new positions previously identified Please fill in the columns for the needed positions Also add/modify/delete positions as needed Priorities: <ol style="list-style-type: none"> Identify staffing needs Identify FTE level across length of project Identify how work could get done Describe position that needs to be filled Document what happens if position is not filled or not fully filled Due dates: <ul style="list-style-type: none"> January 11 - more refined staff details (presented to LEG as a "work in progress") January 25 - "finalized" staff details 	
	Draft Implementation Tasks /Template	Holly	<ul style="list-style-type: none"> Review by end of January, when Holly will turn the task list into a project plan Holly is happy to meet with functional areas individually to assist in developing the task list for that area—simply add a meeting to her calendar You can ignore the first 35 rows of the "Planning" tab, which are tasks for project management plans and documents that Holly will be updating due to the switch from OLE to FOLIO—after the updates are made Holly will review the plans /documents with the group as she did when they were originally created. Changes will be made to project plan after January 31 	
	Any other old business?	Anyone		
9:30	New Business			
	Any new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings 	

2019-01-29

Attendees

Ann, Dean, Holly, Jason, Jesse, Mary Beth, Sharon

Regrets: Deb, Peter, Simeon

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Sprint review at 11:00 AM today - attend using https://zoom.us/j/145661114 FOLIO Forum on Roadmap at 11:00 AM 2/6 - register using https://zoom.us/webinar/register/WN_JGgW7_39QH-SRfkUpM9Csw 	
	Senior management updates	Dean	<ul style="list-style-type: none"> Will Sandy attend our meetings going forward? <i>No, she won't--Simeon and Holly will temporarily take on this role (gap will be short)</i> Should Holly work directly with Ezra on budget issues? <i>Yes, work directly with Ezra and Ken--Sandy can step in as needed</i> Any parting words of encouragement? <i>Gar sent update to OLE Board</i> 	<ul style="list-style-type: none"> Holly will find out what is holding up Community Newsletter
9:15	Old Business			
	Action items from last meeting	Holly	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Holly: Will talk to Gerald and Zsuzsa about forwarding monthly OLE Community Newsletter to CUL (starting mid-January) along with CUL-specific update <i>Waiting to see first Newsletter</i> Holly: Ask PC about End User Documentation again <i>On Holly's TO DO list</i> Holly: Update Project Management Plan/Project Documents and review with team <i>On Holly's TO DO list</i> Robbie: Bring up FOLIO sandbox by end of January (attending meeting January 29/February 5) <i>Robbie now has access to Aster Release</i> Everyone: Add to list of what we will use sandbox for here <i>If you think of anything else</i> <p>ACTION ITEMS TO DISCUSS</p> <ul style="list-style-type: none"> Jesse: Planning FOLIO First Friday for February 1 as a "round robin" <i>Are we ready for this?</i> Jesse: <i>Ask PC to initiate usability testing of FOLIO. CUL recently offered Kevin Kidwell (a UX/UI Designer) as coordinator of FOLIO usability testing</i> Everyone: "Finalize" Staffing Details for LEG by January 25 <i>Dean sent interim staffing details to Ezra on January 18--please bold cells that are changed</i> Everyone: Review Draft Implementation Tasks/Template and make changes by January 31 <i>Will be loading task list to Open Project, which Chris set up for us</i> 	<ul style="list-style-type: none"> Jesse will plan FOLIO Friday for 2/8 instead of 2/1

	EBSCO hosting visit	Holly	<p>Spreadsheet containing EBSCO questions and answers</p> <p>We need to consider both hosting and implementation services.</p> <p>HOSTING</p> <ul style="list-style-type: none"> • We will get a quote for hosting that includes support—EBSCO does not have support tiers at this point • Before EBSCO can finalize our yearly cost they need to know exactly what we want <ul style="list-style-type: none"> • 99.99% or 99.999% up time? • Test system? • Price will not go up more than X per year? • Multi-year deal? • How much data to migrate? Start from scratch? How far back? <p>IMPLEMENTATION</p> <ul style="list-style-type: none"> • EBSCO would help us re-evaluate how we do things--data cleanup, workflows, etc. • They would walk us through the process as project manager • EBSCO's Process <ul style="list-style-type: none"> • Kick-off & analysis (set up instance of FOLIO, define roles, set meeting schedule, agree on communication plan) • Process mapping & change management (current workflow, desired workflow, load sample data, create test scenarios) • Data migration & testing • EBSCO & other product integrations • Training (including structure for future training as FOLIO changes) • Go-live process <p>OVERALL</p> <ul style="list-style-type: none"> • Would implementation services be available if we don't use EBSCO's hosting service? Could we use migration process, training, etc. but not hosting? EBSCO is accessing the market needs. • EBSCO is thinking about how to structure and price their services? Three levels perhaps? <ul style="list-style-type: none"> • Preparing library for change • Implementation services • Hosting • We should feel free to talk to Steve Bischoff (at Five Colleges) about their experience <p>WHAT'S NEXT?</p> <ul style="list-style-type: none"> • Holly will do a first draft of how our staffing needs would change if we made use of EBSCO implementation services • She will share the plan with the team to make sure it is reasonable (hopefully at our next meeting) • Then she will get pricing from EBSCO and compare the cost of the "EBSCO" plan with the cost of our current staffing plan 	
	Any other old business?	Anyone		
9:45	New Business			
	FOLIO Implementation SIG	Holly	<ul style="list-style-type: none"> • Meeting with OLE Steering Committee after this meeting to gain approval • Want to have one implementation group for anyone interested in implementation issues (rather than the two we have now) • Will then get approval from the Product Council • Sub-groups will be created to deal with data cleanup, etc. (<i>When the original group last met in May, we planned to focus on data cleanup, standing up an instance of FOLIO, and the gap analysis</i>) • All of our activities will be documented on the wiki 	
	Definition of "ERM-only implementation"	Holly	<ul style="list-style-type: none"> • Three OLE libraries want to implement the ERM app in 2019 (Leipzig and 2 GBV libraries—Bremen and Kiel) • Holly has been asked to figure out what these libraries need, so... <ul style="list-style-type: none"> • GBV is ranking the ERM-related features for their 2 libraries at a meeting this week • Holly will ask Leipzig to do the same • Then GBV and Leipzig will review the results together to see if they can agree on one set of rankings (or at least something close) for all three libraries • I am hoping that CUL will take a look after that and let me know if the rankings seem reasonable for us (as a sample US library) 	
	Any other new business?	Holly	<ul style="list-style-type: none"> • Look at proposed topics for future meetings 	

2019-02-12

Attendees

Ann, Deb, Holly, Jason, Jesse, Mary Beth, Peter, Sharon, Robbie (guest)

Regrets: Simeon

Discussion Items

Time	Item	Who	Notes	Actions																																
9:00	Housekeeping																																			
	Announcements	Holly	<ul style="list-style-type: none"> I have ended my recurring Tuesday 9:00 AM meetings on March 12--Debra may change the time, but even if she doesn't she should control the Outlook meeting. I will meet with Debra one-on-one to bring her up to speed on FOLIO, and then possibly in an ongoing manner to keep her up to date on FOLIO development--I will not attend these meetings unless specifically invited by Debra. We are one step closer to establishing new FOLIO Implementation Group--the draft charge has been sent to the Product Council Executive Committee for review. There are now three JIRA projects for FOLIO: <ul style="list-style-type: none"> FOLIO Implementation - for use by this team in implementing FOLIO at Cornell. FOLIO Problems - for use in reporting issues/problems with FOLIO. FOLIO DevOps - for use by the devops in deploying FOLIO. 																																	
	Action items from last meeting	Holly	<p>OPEN ACTION ITEMS (<i>some have been moved to "Preparing for Debra" below</i>)</p> <ul style="list-style-type: none"> Holly: Ask PC about End User Documentation again <i>Holly will complete this before Debra starts.</i> Jesse: Ask PC to initiate usability testing of FOLIO. <i>CUL recently offered Kevin Kidwell (a UX/UI Designer) as coordinator of FOLIO usability testing. Meeting tomorrow including Darcy and Kevin.</i> Holly: Why hasn't Community Newsletter gone out? <i>Ginny passed the first draft to the OLE Marketing group but hasn't heard back--she said she would check with them.</i> 																																	
9:15	Old Business																																			
	FOLIO Friday	Holly /Jesse	<ul style="list-style-type: none"> How did it go? <i>25 people in Olin and none in Mann. Deb pointed out that FOLIO is discussed at monthly Access Services meetings.</i> People want to hear more details--the FOLIO Friday was superficial. Holly created a wiki page with links to FOLIO Friday recordings. 																																	
	FOLIO Sandbox	Holly /Robbie	<ul style="list-style-type: none"> How should we roll this out? Test areas where we have expertise first? Do some set up? STEP 1: Make sure FOLIO test instance doesn't have system errors. <ul style="list-style-type: none"> Test area of expertise. Set up necessary settings. Report issues in JIRA. Give all clear to Robbie. Complete testing by next week's meeting. STEP 2: Open test instance to CUL. <ul style="list-style-type: none"> Provide- <ul style="list-style-type: none"> Give people a list of tasks to do List of what you can do now Source of data not Cornell right now (When?) Change settings to Cornell settings (keeping in mind they will go away when we upgrade) Q4 has release notes that describe what doesn't work List of features to be worked on How to report problems (we don't have enough JIRA seats for everyone at CUL to have an account--we will need one shared account) Have kickoff- <ul style="list-style-type: none"> Gerald will emphasize importance of project Introduce Debra Release sandbox DETAILS: <ul style="list-style-type: none"> Sandbox URL: folio-2018q4.library.cornell.edu (Username: cul_admin Password: admin) JIRA URL for reporting problems: https://culibrary.atlassian.net/jira/software/projects/FOLPROB/boards/77 JIRA accounts: <table border="1" data-bbox="435 1493 1386 1774"> <thead> <tr> <th>username</th> <th>full_name</th> <th>email</th> <th>last active in Jira</th> </tr> </thead> <tbody> <tr> <td>jak473</td> <td>Jason Kovari</td> <td>jak473@cornell.edu</td> <td>Never logged in</td> </tr> <tr> <td>jtk1@cornell.edu</td> <td>Jesse Koennecke</td> <td>jtk1@cornell.edu</td> <td>Never logged in</td> </tr> <tr> <td>dsl6</td> <td>Deb Lamb-Deans</td> <td>dsl6@cornell.edu</td> <td>Never logged in</td> </tr> <tr> <td>ama8</td> <td>Ann Cowley</td> <td>ama8@cornell.edu</td> <td>Never logged in</td> </tr> <tr> <td>phm64</td> <td>Peter McCracken</td> <td>phm64@cornell.edu</td> <td>16-Nov-18</td> </tr> <tr> <td>mm524</td> <td>Mary Beth Martini-Lyons</td> <td>mm524@cornell.edu</td> <td>12-Nov-18</td> </tr> <tr> <td>s1m5</td> <td>Sharon Beltaine</td> <td>s1m5@cornell.edu</td> <td>20-Dec-18</td> </tr> </tbody> </table> <p>(<i>If you have never logged in to the new hosted version of JIRA, you may experience difficulties--if so, contact Greg Delisle</i>)</p>	username	full_name	email	last active in Jira	jak473	Jason Kovari	jak473@cornell.edu	Never logged in	jtk1@cornell.edu	Jesse Koennecke	jtk1@cornell.edu	Never logged in	dsl6	Deb Lamb-Deans	dsl6@cornell.edu	Never logged in	ama8	Ann Cowley	ama8@cornell.edu	Never logged in	phm64	Peter McCracken	phm64@cornell.edu	16-Nov-18	mm524	Mary Beth Martini-Lyons	mm524@cornell.edu	12-Nov-18	s1m5	Sharon Beltaine	s1m5@cornell.edu	20-Dec-18	Everyone: Test CUL FOLIO test instance looking for system errors
username	full_name	email	last active in Jira																																	
jak473	Jason Kovari	jak473@cornell.edu	Never logged in																																	
jtk1@cornell.edu	Jesse Koennecke	jtk1@cornell.edu	Never logged in																																	
dsl6	Deb Lamb-Deans	dsl6@cornell.edu	Never logged in																																	
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<i>Didn't get to this agenda item or any below this</i>	Data Migration Team	Sharon	The CUL Data Migration Team has been formed. We would like feedback from the CUL Implementation Team on the charge, scope, and membership of the Data Migration group. Specifically, we would like to know how we will address integrations between FOLIO and other systems.																																	
	Any other old business?	Anyone																																		

9:45	New Business			
	Preparing for Debra	Holly	<p>Project Management Plan/Project Documents: Holly will update the plan and documents to reflect our current reality. What Holly produced follows the Project Management Institute's recommended approach to projects—given Debra has the same certification as Holly she is likely to follow a similar approach.</p> <p>Monthly Report to CUL: Holly has been waiting for the new Community Newsletter to be available (it was due in early January) to create a monthly report to CUL that included the Community Newsletter for overall project news along with a CUL status report. Dean requested that Holly talk to Gerald and Zsuzsa first. Debra can kick off this process—in fact it will be a nice transition to her leadership.</p> <p>Staffing Details: Holly has made updates per the recent additions of Debra and Phil and passed these changes to Ezra. Now need to generate alternate plan that reflects the impact of using EBSCO implementation services (see columns G and H of spreadsheet) and get estimates from EBSCO. Should this wait for Debra or not? Depends on LEGs needs. Should ask Ezra.</p> <p>Implementation Plan: Right now we have a list of implementation tasks that Holly planned to load into Open Project and turn into an implementation plan. This has been on the back burner because of the high priority given to Staffing Details. Holly is concerned about doing this before Debra arrives because as a Project Manager she know that every PM has their own way of doing plans—Debra may even have a template she uses or she may have access to a better tool through her CIT connections.</p> <p>EBSCO Migration Services: Debra should spearhead the evaluation of whether we use some or all of EBSCO's migration services.</p> <p>EBSCO Hosting Services: Debra and Phil should work together, with the Library Systems team, to determine if EBSCO hosting is a viable solution for CUL.</p> <p>Redesign of LStools: Darcy and Simeon feel that this should wait until Debra is on-board.</p>	
	Any new business?	Holly	<ul style="list-style-type: none"> • Look at proposed topics for future meetings 	

2019-02-19

Attendees

Ann, Deb, Holly, Jason, Jesse, Peter, Phil, Sharon, Simeon, Robbie (guest)

Regrets: Mary Beth

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Welcome Phil! Duke is looking into Index Data hosting for FOLIO—Tim McGeary tim.mcgeary@duke.edu has offered to share info and Sandy has told him we will share EBSCO hosting info. Product Council has approved Holly's proposal for a new FOLIO Implementation Group (see charge)—each institution will provide the name of one person for whom the meeting will be schedule around (but all are welcome). Chicago asked for a second gap analysis now that many features have been developed, so Holly is working with Kristen and Dracine to plan Gap Analysis: The Sequel (see Holly's notes). 	
	Action items from last meeting	Holly	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Holly: Ask PC about End User Documentation again <i>Paula has agreed that the PC Exec will take this on. The Tech Council has asked for a technical writer for technical documentation so end user documentation will be addressed at the same time.</i> Holly: Update Project Management Plan and Project Documents and present again to team. <i>The Project Documents have been updated—Project Management Plan will be updated before next meeting. All will be presented at next meeting.</i> 	Holly: Update PM Plan
9:15	Old Business			
	Data Migration Team	Sharon	The CUL Data Migration Team has been formed. We would like feedback from the CUL Implementation Team on the charge, scope, and membership of the Data Migration group. Specifically, we would like to know how we will address integrations between FOLIO and other systems.	Everyone: Review charge and membership
	FOLIO Sandbox Testing	Robbie	<ul style="list-style-type: none"> STEP 1: Make sure there are no system errors- <ul style="list-style-type: none"> Test your area of expertise. Set up necessary settings. Report issues in JIRA. Give all clear to Robbie if no issues found. Complete testing by today! 	Everyone: Try out FOLIO Sandbox
	FOLIO Sandbox Introduction	Darcy	<ul style="list-style-type: none"> STEP 2: Open up test instance to CUL- see notes from February 12th meeting <ul style="list-style-type: none"> Kevin Kidwell will be coordinator of usability testing for FOLIO development project. Will assist institutions in how to do usability testing. What if we start at Cornell? <ul style="list-style-type: none"> Set aside time for a functional area Let people come in and out Facilitate use of our sandbox—be there to help people Have 3 tasks for people to do Ask CUL Usability Team to help out—Darcy will get us on their agenda If CUL UT can't help, we will have to get help elsewhere 	Darcy: See if CUL Usability Team will help us
	Any other old business?	Anyone		
9:45	New Business			
	Preparin g for Debra	Holly	<p>Project Management Plan/Project Documents: Holly will update the plan and documents to reflect our current reality. What Holly produced follows the Project Management Institute's recommended approach to projects—given Debra has the same certification as Holly she is likely to follow a similar approach.</p> <p>Staffing Details : Holly has made updates per the recent additions of Debra and Phil and passed these changes to Ezra. Now need to generate alternate plan that reflects the impact of using EBSCO implementation services (see columns G and H of spreadsheet) and get estimates from EBSCO. Check into Indexdata and others as well? This part will wait for Debra. Also, we asked for a 1.0 FTE project manager and Debra is .5 FTE. Holly updated the plan to ask for an additional .5 FTE project management assistant for Debra. Debra should decide what she really needs.</p> <p>Implementation Plan: Right now we have a list of implementation tasks that Holly planned to load into Open Project and turn into an implementation plan. This has been on the back burner because of the high priority given to Staffing Details. Holly is concerned about doing this before Debra arrives because as a Project Manager she know that every PM has their own way of doing plans—Debra may even have a template she uses or she may have access to a better tool through her CIT connections.</p> <p>EBSCO Migration Services: Debra should spearhead the evaluation of whether we use some or all of EBSCO's migration services.</p> <p>EBSCO Hosting Services: Debra and Phil should work together, with the Library Systems team, to determine if EBSCO hosting is a viable solution for CUL.</p> <p>Monthly Report to CUL: Holly has been waiting for the new Community Newsletter to be available (it was due in early January) to create a monthly report to CUL that included the Community Newsletter for overall project news along with a CUL status report. Dean requested that Holly talk to Gerald and Zsuzsa first. Debra can kick off this process—in fact it will be a nice transition to her leadership.</p> <p>Sandbox Release: We want to have a second project kickoff when we release the sandbox to CUL. As part of the kickoff we would like to have Gerald speak on the importance of the project and it will be a good opportunity to introduce Debra to CUL.</p> <p>Redesign of LStools: Darcy and Simeon feel that this should wait until Debra is on-board.</p> <p>Integration Work: Need a team like that created for Data Migration, plus a .5 FTE developer.</p>	
	Any new business?	Holly	<ul style="list-style-type: none"> Look at proposed topics for future meetings 	

2019-02-26

Attendees

Ann, Deb, Debra, Holly, Jason, Jesse, Peter, Phil, Sharon

Regrets: Mary Beth

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Welcome Debra! FOLIO face-to-face meeting date and location still not finalized, but most likely June 17-19, just before ALA (in Baltimore). FOLIO Implementation Group wiki created-PC members have until Wednesday noon to provide member then meeting time will be determined. Gap Analysis 2019 plan going to Product Council for approval Thursday-if time frame approved, will be due April 30. 	
	Action items from last meeting	Holly	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Holly: Ask PC about End User Documentation again <i>Still being discussed by PC-trying to determine best step forward.</i> Holly: Update Project Management Plan and Project Documents and present again to team. <i>Everything has been updated. Won't present to team in case Debra wants to make changes.</i> Everyone: Review CUL Data Migration Team charge and membership and pass comments to Sharon. <i>Done.</i> Everyone: Try out new FOLIO Sandbox and report issues in JIRA before next meeting. Darcy: Ask CUL Usability Team to help us with FOLIO testing at CUL. <i>Didn't have a chance yet.</i> Jesse: FOLIO Friday on March 8 to discuss Reporting. 	
9:15	Old Business			
	Introducing CUL Staff to FOLIO Sandbox	Darcy	<ul style="list-style-type: none"> Kevin Kidwell will be coordinator of usability testing for FOLIO development project--he will assist institutions in how to do usability testing What if we start at Cornell? <ul style="list-style-type: none"> Set aside time for a functional area Let people come in and out of room Facilitate use of our sandbox--be there to help people Have 3 tasks for people to do Ask CUL Usability Team to help out--Darcy will get us on their agenda If CUL UT can't help, we will have to get help elsewhere What area should we start with first? RA features are furthest along. Darcy and Kevin will attend March 13 AS Coordinating Committee to plan this--will meet with Deb first to plan discussion for meeting. 	
	Transition to Debra	Holly	<p>Project Management Plan/Project Documents: Holly has updated the plan and documents to reflect our current reality. What Holly produced more or less follows the Project Management Institute's recommended approach to projects--given Debra has the same certification as Holly she is likely to follow a similar approach.</p> <p>Staffing Details : Holly has made updates per the recent additions of Debra and Phil and passed these changes to Ezra. Now need to generate alternate plan that reflects the impact of using EBSCO implementation services (as started in columns G & H) and get estimates from EBSCO. Check into Indexdata and others as well? This part will wait for Debra. Also, we asked for a 1.0 FTE project manager and Debra is .5 FTE. Holly updated the plan to ask for an additional .5 FTE project management assistant for Debra. Tahir is interested in this position, but Debra should decide what she really needs.</p> <p>Implementation Plan: Right now we have a list of implementation tasks that Holly planned to load into Open Project and turn into an implementation plan. This has been on the back burner because of the high priority given to Staffing Details. Holly is concerned about doing this before Debra arrives because as a Project Manager she know that every PM has their own way of doing plans--Debra may even have a template she uses or she may have access to a better tool through her CIT connections.</p> <p>EBSCO/Indexdata Migration Services: Debra should spearhead the evaluation of whether we use some or all of EBSCO's/Indexdata's migration services.</p> <p>EBSCO/Indexdata Hosting Services: Debra and Phil should work together, with the Library Systems team, to determine if EBSCO/Indexdata hosting is a viable solution for CUL.</p> <p>Monthly Report to CUL: Holly has been waiting for the new Community Newsletter to be available (it was due in early January) to create a monthly report to CUL that included the Community Newsletter for overall project news along with a CUL status report. Dean requested that Holly talk to Gerald and Zsuzsa first. Debra can kick off this process--in fact it will be a nice transition to her leadership.</p> <p>Sandbox Release: We want to have a second project kickoff when we release the sandbox to CUL. As part of the kickoff we would like to have Gerald speak on the importance of the project and it will be a good opportunity to introduce Debra to CUL. Before this happens, we need to have a plan in place for loading CUL data into the Sandbox.</p> <p>Redesign of LStools: LStools should be redeveloped as a FOLIO app. Rather than replace all of the "tools", we need to determine which are still needed after we migrate to FOLIO. FOLIO will hopefully make the need for some of the "tools" obsolete. Nick, who is in Darcy's group, has been assigned as a .8 FTE to work on LStools. Darcy and Simeon feel that this work should wait until Debra is on-board.</p> <p>Integration Work: Originally we planned to hire a 1.0 FTE dev to work on both data migration and integration. Instead, we assigned existing CUL IT dev Frances Webb to work .5 FTE on data migration. This means that we still need a .5 FTE dev for integration. Phil has some good ideas for how to address integrations that he will discuss with Debra.</p> <p>User Management SIG: Need to replace Deb Lamb with CUL-IT person as Cornell Rep on this SIG.</p>	
	Any other old business?	Anyone		
9:50	New Business			
	Any new business?	Anyone	<ul style="list-style-type: none"> Look at proposed topics for future meetings 	

2019-03-05

Attendees

Ann, Deb, Debra, Jason, Mary Beth, Phil, Sharon

Regrets: Jesse, Peter

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Debra	<p>Holly, Phil, and Debra met to do a "Holly brain dump" to help transition the CUL Implementation team hand-off happening.</p> <p>Sharon reported out about the Standard Reporting SIG meeting. They have also asked for and FTE to work on reporting.</p> <p>Phil has taken over as representative on User Management SIG.</p> <p>Phil reported that he reached out to Jeff Christen in CIT's Integration team to talk about having them help us out with the integrations.</p>	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • Jesse (was Holly): Ask FOLIO Product Council to address End User Documentation again <i>Still being discussed by PC—trying to determine best step forward.</i> • Everyone: Try out new FOLIO Sandbox and report issues in JIRA by this meeting. <ul style="list-style-type: none"> • Sandbox not working the same way the EBSCO sandbox is working • Let's review this again next time. • Deb is still trying to figure out the calendar, but she could do fines. • Darcy: Ask CUL Usability Team to help us with FOLIO testing at CUL. <ul style="list-style-type: none"> • Darcy spoke at yesterday's meeting • Usability Team was enthusiastic about helping • Usability Team has testing days scheduled monthly • April 15th they could pencil us in to do testing. They would like to look at the tasks ahead of time that they will be doing user testing on. <ul style="list-style-type: none"> • Deb Lamb has a user stories test list leftover from Voyager <p>A basic list of circ tasks that Folio can handle:</p> <p>Finer a user/proxy</p> <p>Find item</p> <p>Check item out</p> <p>Change due date</p> <p>Check item in</p> <p>Request – hold, recall</p> <p>Add manual fee/fine</p> <ul style="list-style-type: none"> • <i>Circulation will be the area to test in.</i> <ul style="list-style-type: none"> • Jesse: Plan FOLIO Friday on March 8 to discuss Reporting. <ul style="list-style-type: none"> • Jesse is out until Thursday. • We'll move this to March 15th. • Sharon will follow up with Jesse about the 15th and loop us both in. • Communication needs to go out today and 3 days before • Darcy/Kevin/Deb: Working with Access Services Coordinating Committee to plan CUL introduction to Sandbox. <ul style="list-style-type: none"> • Access Services integrations need to be considered and captured. • If FOLIO has a robust Reserve system, we could use that rather than Aries. • Deb and Darcy will talk offline to work out a plan. 	
9:15	Old Business			
	TBD	TBD		

	Any other old business?	Anyone	<p>Darcy - LStools - a developer, Nick, from Darcy's team will be working on this. Darcy reached out to Adam Chandler, and he was taken off guard by that. Darcy, Phil, and Adam should meet to plan.</p> <p>Jason reports that there is quite a bit of discussions across the SIGs about the CODEX. What is it? What is it intended for? What is its scope? We should keep an eye on this from the Cornell standpoint; especially if it gets spun out into its own SIG.</p> <p>Darcy - What is our Communication Plan? Externally and Internally to the Implementation Team? Who do we need to communicate with? When? How?</p> <p>Should we bring in Zsuzsa and get her thoughts on a communication plan?</p>	
9:45	New Business			
	TBD	TBD		
	Any new business?	Anyone	<ul style="list-style-type: none"> • Look at proposed topics for future meetings • Holly sent Phil the list of Integrations we know about currently. We need to look at it and make sure we have a complete list of integrations. We need to form an integration team. Phil will lead this effort. • Take a look at the task list and get it filled in...along with a timeline. 	

2019-03-12

Attendees

Ann, Deb, Debra, Mary Beth, Phil, Sharon, Peter, Darcy

Regrets: Jesse, Jason

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Debra	FOLIO Development update: https://docs.google.com/document/d/12qmiXfELjMIDRBECdbAMmpmHrG812k-dZzieQxPHt8/edit FOLIO Development Milestones (in OneNote)	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • Zsuzsa: communication plan <ul style="list-style-type: none"> • Create Confluence Project Materials page for this and populate with OneNote notes • New Team Meeting Time (view Google Poll) <ul style="list-style-type: none"> • Trade MaryBeth for Frances - ask Adam Smith • June 2nd, Deb Lamb will be replaced by new Director of Access Services • Jesse (was Holly): Ask FOLIO Product Council to address End User Documentation again <i>Still being discussed by PC-trying to determine best step forward.</i> • Phil: Holly sent Phil the list of Integrations we know about currently. We need to look at it and make sure we have a complete list of integrations. We need to form an integration team. Phil will lead this effort. <ul style="list-style-type: none"> • There's an implementation/integrations Confluence page. Phil is updating. • Phil is correlating integrations lists • SysOps SIG is also looking at Integrations • Talking with Jeff Christen in CIT about contracting with them to work on integrations • Everyone: Try out new FOLIO Sandbox and report issues in JIRA by this meeting. <ul style="list-style-type: none"> • Proxy not working has been reported to the Development Team • Service points need to be created to do testing - Phil looking for a way to automatically populate • Voyager security rules/roles need to be captured and recreated in FOLIO - where are they (Oracle table? Application?) <ul style="list-style-type: none"> • https://confluence.cornell.edu/display/LTSP/Security+Profiles+in+Voyager • Jesse: Plan FOLIO Friday on March 15th to discuss Reporting. Schedule/Plan April FOLIO Friday Schedule for 106 for first Friday in April with Zoom and recording. Intro to Debra and Phil and the CU Implementation Team. Share FOLIO Roadmap. Q&A. • Darcy/Deb: Working with Access Services Coordinating Committee to plan CUL introduction to Sandbox. <ul style="list-style-type: none"> • Access Services integrations need to be considered and captured. • If FOLIO has a robust Reserve system, we could use that rather than Ares. • Deb and Darcy will talk offline to work out a plan. • Everyone/Debra: Take a look at the task list and get it filled in...along with a timeline. <ul style="list-style-type: none"> • https://docs.google.com/spreadsheets/d/12AhfyCuFXkqQgNpzt3th_2vqLReUtk-BMA_or8UMM/edit?usp=sharing 	
9:15	Old Business			
		Darcy	Any updates on LStools - a developer, Nick, from Darcy's team will be working on this. Darcy reached out to Adam Chandler, and he was taken off guard by that. Darcy, Phil, and Adam should meet to plan. <ul style="list-style-type: none"> • Meeting for Nick to talk to Gary Branch (meeting 4pm on March 13, 2019) 	
	Any other old business?	Anyone	Sharon - data migration update - Jen, Joe McEnerney	
9:45	New Business			
	Sandbox service points	Phil/Deb	Deb Lamb had this question about adding service points and fee/fine owners to the FOLIO sandbox. I wouldn't know about that (yet) but I replied that she could set them up herself probably. Do you have insights for her on that? Cc'ing Deb Howell as we'll probably need to figure out a strategy for core setup data that would need to be in place for meaningful testing. Maybe some work has already been done in that space. - PHIL IS WORKING ON THIS	
	Staffing	Darcy /Debra	Tahir	
	Any new business?	Anyone	<ul style="list-style-type: none"> • Look at proposed topics for future meetings 	

2019-03-19

Attendees

Ann, Deb, Debra, Phil, Sharon, Peter, Darcy, Jesse, Tahir, Nick

Regrets: Frances, Jason

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Debra / Tahir	<p>Welcome Frances! And Tahir! And Nick!</p> <p>How are we organizing ourselves?</p> <p>ex:</p> <p>Hi Deb,</p> <p>This FOLIO integration list had more useful information than others I've seen, so I've been updating it (I added several columns we'll need, such as source / target / frequency / endpoints etc). https://confluence.cornell.edu/display/OLE/Integration+List</p> <p>I still don't have edit access to the Google Spreadsheet at https://docs.google.com/spreadsheets/d/12AhfjyCufXkqQgNpzh3th_2vqLReUtk-BMA_or8UMM/edit#gid=1056246216 but would be fine transferring to that if you prefer.</p> <p>Thanks, Phil</p> <p>-- Meeting time has to move again 😞</p> <ul style="list-style-type: none"> • Debra will send Doodle Poll <p>-- Remember to send headshot and blurb by tomorrow</p>	We will use MS Project for project management tool. Send request to Desktop Services to get it installed if you want/need it.
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • Communication plan <ul style="list-style-type: none"> • Communication Management Plan • First newsletter to All Staff • Jesse (was Holly): Ask FOLIO Product Council to address End User Documentation again <i>Still being discussed by PC—trying to determine best step forward.</i> <ul style="list-style-type: none"> • In person meeting June 17-19 in D.C. • Gap Analysis <ul style="list-style-type: none"> • complete Cornell's piece by the end of April • Will be crunched at In Person meeting and shared • Jesse will share Excel spreadsheet and folks will fill in • Mainly work on Open and Missing Features Tab • One of our meetings at the end of April will be devoted to a review of the completed Cornell Gap Analysis before submission • Phil: <ul style="list-style-type: none"> • Voyager security rules/roles need to be captured and recreated in FOLIO - where are they (Oracle table? Application?) <ul style="list-style-type: none"> • https://confluence.cornell.edu/display/LTSP/Security+Profiles+in+Voyager • Sharon: How was FOLIO Friday on March 15th? <ul style="list-style-type: none"> • Session went well; good questions; 15-20 in person and 12 on Zoom • April FOLIO Friday: April 12th, 106 Olin for first Friday. Intro to Debra and Phil and the CU Implementation Team. Share FOLIO Roadmap. Q&A. Gap Analysis? • Darcy/Deb: USABILITY TESTING/Cornell Data <ul style="list-style-type: none"> • Working with Access Services Coordinating Committee to plan CUL introduction to Sandbox. • Access Services integrations need to be considered and captured. • If FOLIO has a robust Reserve system, we could use that rather than Ares. • Deb and Darcy will talk offline to work out a plan. • Calendar issue: Darcy reports that the Product Owner is open to feedback; feedback needs to go into the JIRA ticket; Jesse may need to escalate to Product Council • Tahir: Take a look at the task list and get it filled in...along with a timeline. <ul style="list-style-type: none"> • https://docs.google.com/spreadsheets/d/12AhfjyCufXkqQgNpzh3th_2vqLReUtk-BMA_or8UMM/edit?usp=sharing 	
9:15	Old Business			
	Staffing	Debra	Tahir, Joe M.	
		Everyone	Once around: what people have worked on in the last week/issues/report outs (integrations, migrations, reporting, hosting, sandbox testing, etc)	Tabled for next time
	Any other old business?	Anyone		
9:45	New Business			

	Gap Analysis	Jesse	Due April 30, 2019	
	Any new business?	Anyone	<ul style="list-style-type: none">• Look at proposed topics for future meetings	

2019-03-26

Attendees

Ann, Deb, Debra, Phil, Sharon, Peter, Darcy, Jesse, Tahir, Nick, Frances, Jason

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Debra	-- Meeting time has to move again 😞 <ul style="list-style-type: none"> Doodle Results -- First newsletter has gone out	Mondays 1pm
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> Jesse: Any updates/info/ect on Gap Analysis <ul style="list-style-type: none"> https://docs.google.com/spreadsheets/d/1-JomufIQm9xU8wXvOrgV3adLsS9hOzkAiFbS4ix4eUA/edit#gid=2074261517 Tahir: Selected PM Tool? (MS Project does not work on a Mac) Tahir: Task List update <ul style="list-style-type: none"> https://docs.google.com/spreadsheets/d/12AhfjyCufXkqQgNpzth3th_2vqLReUtk-BMA_or8UMM/edit?usp=sharing <ul style="list-style-type: none"> Tahir downloaded Holly's document. He's going to tweak it a little and then upload to Box. 	2 meetings in April devoted to review Zoho BOX
9:15	Old Business			
		Debra	Update Staffing Document: https://docs.google.com/spreadsheets/d/1ckmBZbTV38QaRzkbvBJ3pXvEE-TqN5k-av_E6Fdp6iQ/edit#gid=554061062	Tabled for next time.
	Any other old business?	Anyone		
9:45	New Business			
		Debra /Phil	Hosting <ul style="list-style-type: none"> quotes from EBSCO and Index Data for migration services and hosting Ensure FERPA compliance - in Voyager, we break the link between patron data and borrowing record if there are no fines associated 	
		Jesse	ERM - EBSCO hosting <ul style="list-style-type: none"> going to LEG this week 	
	Any new business?	Anyone		

2019-04-01

Attendees

Ann, Deb, Debra, Phil, Sharon, Peter, Darcy, Jesse, Tahir, Nick, Frances

Regrets: Jason

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Debra	-- 201 admin staff will do admin support	
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> • Jesse: Any BRIEF updates/info/ect on Gap Analysis <ul style="list-style-type: none"> • Two April meetings will be devoted to finishing this. • Tahir: Zoho purchase process? <ul style="list-style-type: none"> • MaryBeth is working on getting it purchased • Tahir: Task List BRIEF update <ul style="list-style-type: none"> • It's in Box and people are working on it 	
9:15	Old Business			
		Debra	Update Staffing Document: https://docs.google.com/spreadsheets/d/1ckmBZbTV38QaRzkvBJ3pXvvEE-TqN5k-av_E6Fdp6iQ/edit#gid=554061062 <ul style="list-style-type: none"> • Pick it up again next time 	
		Jesse	ERM to EBSCO - approved by LEG - next steps? <ul style="list-style-type: none"> • Move from Summon to EBSCO Discovery • May be used as an EBSCO FOLIO hosting test case • LTS will do data migration 	
	Any other old business?	Anyone	<ul style="list-style-type: none"> • Sharon - we're starting reporting for e-Usage 	
9:45	New Business			
		Debra	Topics for next FOLIO Friday on April 12th - THERE WILL BE COOKIES! <ul style="list-style-type: none"> • Intro to the Implementation Team • Difference between Development and Implementation • Show Development timeline • Overview of Implementation Plan 	
	Any new business?	Anyone		

2019-04-08

Attendees

Ann, Deb, Debra, Phil, Sharon, Peter, Jesse, Tahir, Nick, Frances, Jenn

Regrets: Jason, Darcy

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • Jesse: DC In Person Meeting - by this Friday, Jesse will let us know who should attend from Cornell <ul style="list-style-type: none"> • Product Council, Technical Council • ERM • Aquisitions small group possibility • SysOps possibility • Metadata management ?? • Resource Access - convener and 2-3 members • Reporting - prototype working group • Tahir: Zoho purchase process? <ul style="list-style-type: none"> • Waiting for UBSC to pay for on pcard • Tahir: Task List BRIEF update <ul style="list-style-type: none"> • It's in Box and people are working on it • DEADLINE: Friday, April 12 	
9:15	Old Business			
		Debra	Update Staffing Document: https://docs.google.com/spreadsheets/d/1ckmBZbTV38QaRzkvBJ3pXvvEE-TqN5k-av_E6Fdp6iQ/edit#gid=554061062	
		Debra	Review for FOLIO Friday on April 12th	
	Any other old business?	Anyone		
9:45	New Business			
			<p>May FOLIO Friday: Voyager to FOLIO translation</p> <ul style="list-style-type: none"> • This is what you call it in Voyager...this is what you call it in FOLIO • This is what is not in FOLIO 	Move to 10:00
	Any new business?	Anyone	<ul style="list-style-type: none"> • Newsletter for April deadline on April 24th. Send sub-group updates. 	

2019-04-15

Attendees

Deb, Debra, Phil, Sharon, Peter, Jesse, Tahir, Frances, Jenn, Jason

Regrets: Darcy, Nick, Ann

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • Jesse: DC In Person Meeting - who's going? <ul style="list-style-type: none"> • List sent out by Debra will attend • Tahir: Zoho progress <ul style="list-style-type: none"> • Purchased, initial structure set up • Tahir: Task List BRIEF update <ul style="list-style-type: none"> • DEADLINE was Friday, April 12. Are people done? • Excel spreadsheet locked after this meeting to migrate to Zoho • Then, Tahir will send invites for access • FOLIO Friday - debrief <ul style="list-style-type: none"> • Went well • Feeling in the room was good • Jenn will Lead (Voyager - FOLIO glossary) • FOLIO May Newsletter: sub-group blurbs due April 24th <ul style="list-style-type: none"> • Create FOLIO Blog...so a link 	
9:15	Old Business			
		Jesse	GAP Analysis	
	Any other old business?	Anyone		
9:45	New Business			
		Debra	<p>Folio Bellis. The URL is https://folio-2019q1-sb1.library.cornell.edu/. https://issues.folio.org/browse/UXPROD-1002?filter=11377</p> <ul style="list-style-type: none"> • 94% of items made it in 	
	Any new business?	Anyone	<ul style="list-style-type: none"> • Debra: proceeding with EBSCO migration services and hosting <ul style="list-style-type: none"> • Debra to update implementation email list and then send hosting and migration services proposal to team 	

2019-04-22

Attendees

Deb, Debra, Phil, Peter, Jesse, Tahir, Frances, Jenn, Jason, Darcy, Ann, Joanne

Regrets: Sharon, Nick

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • TAHIR: Task List and Project Plan update <ul style="list-style-type: none"> • Box task list is locked. All tasks moved to Zoho and assigned. • Scheduled training with Zoho on April 29th 1:30-2:30pm • If you've used Zoho in the past, send feedback to Tahir regarding next steps • Need to get start and end dates in the project • FOLIO April Newsletter: sub-group blurbs due April 24th <ul style="list-style-type: none"> • Add Joanne to Implementation Team email list • Blog: CUL FOLIO Implementation Project • Statement of Need is submitted covering hosting, FOLIO, and ERM <ul style="list-style-type: none"> • Charter is in DRAFT form 	
9:15	Old Business			
		Jesse	GAP Analysis	
	Any other old business?	Anyone		
9:45	New Business			
		Holly	<p>Hi Debra and Jesse. I was just emailing with Zsuzsa about OLE Marketing and she mentioned something that sounds like a great topic/sub-group for the new FOLIO Implementation Group: Communicating a FOLIO implementation to our constituents</p> <p>Perhaps you could bring it up at a meeting? Just thought I would share...</p> <p>Thanks,</p> <p>Holly</p>	We don't need to do anything with this
		Debra	<p>Batch Processing</p> <ul style="list-style-type: none"> • Jenn and Nick own this and Jenn has added it to the Gap Analysis - It's an LSTool • The same people doing Import are the same people doing Export, so if Import slips this next quarter Export will be in real trouble. 	
		Debra	"FOLIO will fix it" buttons - use Maker Space????	
	Any new business?	Anyone		

2019-05-06

Attendees

Deb, Debra, Phil, Sharon, Jesse, Tahir, Frances, Jenn, Jason, Darcy, Nick, Ann, Joanne

Regrets: Peter

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements	Debra/Phil	<ul style="list-style-type: none"> FOLIO Charter is submitted and will be reviewed by CIT Leadership Wednesday, May 8, 2019. FOLIO will be impacted by new Data governance process 	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Jenn - FOLIO Friday - ready? <ul style="list-style-type: none"> Debra may not be here on Friday Darcy, Ann, Phil, Sharon, Tahir, Joanne, Frances, Nick will be in attendance Jesse - 79 unranked new features that need to be prioritized. Needs to be done by May 14th. Phil - reached out to CaiaSoft to begin test integration Jesse - FOLIO face-to-face meeting in DC in June - if you're attending, register and get your hotel before May 17th Jason - started conversations with counterparts regarding cataloging and workflows Nick - 15 hours of conversation with Jenn and LTS last week to gather user stories Jenn - the Voyager data migration group met last week and agreed to get started on shared modular code for extracting and mapping Voyager data into the FOLIO format Jenn - we held a demo along with the University of Chicago of LSTools and their helper app for the FOLIO sysops group so that we could talk about how well the functionality of the apps are represented in FOLIO. Workflow, reporting, and FTP functionality seem to be the main areas of work. 	
9:15	Old Business			
		Tahir	Zoho Projects questions, discussion	
		Tahir	Zoho Projects training with Zoho Join Link : https://meeting.zoho.com/meeting/participant.do?key=1085779284&uname=tahir.poduska%40cornell.edu&cid=8987479&token=53296550_66400004866342_tok_daca2e748ca1b3958b99917dd2bc9ece02194d733a4830e2da008b995e299399&conf_code=10890783 Join using your phone United States: +1 408 469 4614 Access Code: 10245615 # View Global Dial-in Numbers : https://meeting.zoho.com/login/zoho-newaudio-instructions.jsp Once you join the meeting, you can choose either your computer audio (VoIP) or your phone for audio transmission. A headset is recommended if you join through computer audio.	
	Any other old businesses?	Anyone		
9:45	New Business			
	Any new businesses?	Anyone	Sharon - created a Reporting page in Confluence...under "Other Sub-Sections"	

2019-05-20

Attendees

Deb, Debra, Sharon, Peter, Tahir, Jason, Darcy, Ann

Regrets: Phil, Jenn, Jesse, Frances, Nick

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> Jenn - FOLIO Friday - debrief <ul style="list-style-type: none"> Add slides to Confluence and share with CU-Lib TIME TO DO NEWSLETTER FOLIO Friday in June - Cancelled <ul style="list-style-type: none"> FOLIO Friday in July - Gap Analysis FOLIO Friday in August - Peter for ERM (Project Grover) Meetings have issues - reschedule and include everyone Debra - IT Governance - FOLIO Charter; TRA review for EDS <ul style="list-style-type: none"> EDS TRA Review - complete 	
9:15	Old Business			
		Darcy	Bring to Product Council concern: perceived focus on Chalmers. Equity discussion. <ul style="list-style-type: none"> Ask Jesse to take to Product Council - we're concerned about the process and the messaging. Feels like the answer to current development projects is "what does Chalmers need?" <ul style="list-style-type: none"> Seems like there is an issue of doing development around what individual institutions need rather than what the product needs Ex: We haven't worked on Fund Management since October, because Chalmers doesn't need it and they are taking up the developers What happens after Go-Live? 	
		Debra	FOLIO Hosting Q&A <ul style="list-style-type: none"> Reiterate that we are still committed to Open Source product/development/mindset 	
		Debra	FOLIO Gap Analysis Presentation (from Holly - not shareable) https://docs.google.com/spreadsheets/d/1abGWXoVtOluPH7Z-zOaQ0RBYz8Gyu0jILrdnaniyDYY/edit#gid=772959462 https://docs.google.com/spreadsheets/d/1OyXxBtOjj4nDQ0bHT7krEmbF42eVRzptdotFZctoWg0/edit#gid=1184700153&range=A1 Cornell Assessment (from Holly - not shareable)	
	Any other old business?	Anyone	Tahir - Task list/project plan/Zoho <ul style="list-style-type: none"> Bring up Timelines at our next meeting 	
9:45	New Business			
		Darcy	User Testing - Move to next meeting	
	Any new business?	Anyone	Peter - ERM <ul style="list-style-type: none"> Officially called Project Grover (Getting Ready to Optimize Validation for Electronic Resources) 	

2019-06-03

Attendees

Debra, Sharon, Peter, Tahir, Darcy, Ann, Jenn, Jesse, Frances

Regrets: Nick, Jason, Phil

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <p>Tahir: Zoho Projects: Timelines</p> <ul style="list-style-type: none"> Tahir has been meeting with groups individually. They indicate that they would like more training. Tahir will set up a training time...or you can set up a one-on-one time with him <p>Debra: Debra out next week. Do you want to meet?</p> <ul style="list-style-type: none"> Cancel next week's meeting <p>Debra: Hosting</p>	
	Old Business			
		Debra	<p>FOLIO Gap Analysis Presentation (from Holly - not shareable)</p> <p>https://docs.google.com/spreadsheets/d/1abGWXoVtOlPH7Z-zOaQ0RBYz8Gyu0jLrDnaniyDYY/edit#gid=772959462</p> <p>https://docs.google.com/spreadsheets/d/1OyXxBtOjj4nDQ0bHT7krEmbF42eVRzptdotFZctoWg0/edit#gid=1184700153&range=A1</p> <p>Cornell Assessment (from Holly - not shareable)</p>	
	Any other old business?	Anyone		
	New Business	Darcy	<p>User Testing</p> <ul style="list-style-type: none"> Reporting/Data Warehouse: wait until Cornell data is in there (2 weeks) For user testing, how important is it that there is Cornell data in there We will have Huda Khan .5 from now until December 2019 to coordinate user testing 	
	Any new business?	Anyone		

2019-06-24

Attendees

Debra, Sharon, Tahir, Ann, Jenn, Phil, Joanne, Nick, Darcy

Regrets: Peter, Jesse, Jason, Frances,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<p>Face-to-face debrief</p> <ul style="list-style-type: none"> Phil: <ul style="list-style-type: none"> EBSCO wants to champion Chalmers go-live (they have set a date of September 30, 2019) and celebrate it when it happens Permissions for FOLIO are highly granular Technical is working on a technical roadmap for the technical stack Overall, people left feeling positive Darcy: <ul style="list-style-type: none"> Product Council meetings: need to get a "Market Viable Product" out How do we get more excitement? More developers involved? More vendors involved? - Darcy has volunteered to help with this. It was very clear that we are very short about what's needed at Go-Live as a product Sharon: <ul style="list-style-type: none"> There's a technical debt spreadsheet created/addressed at the Technical Group meeting: https://docs.google.com/spreadsheets/d/1BsQ_RBk2Cst9bTFak4wkszvZp0BJjaa4wM3racLDP00/edit?usp=sharing 10 Reporting sessions 90 reports condensed down to 51 In App vs Data Warehouse reporting Need a naming convention system 	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <p>Tahir: Zoho Projects Update - tasks</p> <p>Debra: Hosting contract updates</p> <ul style="list-style-type: none"> In Counsel's Office for review - Ken tracking while Ezra is out ERM approved and "signed" <p>Darcy: User testing update</p> <ul style="list-style-type: none"> Should Huda be added to these meetings? YES 	
	Old Business			
		Debra	<p>Gap Analysis and Capacity Planning</p> <ul style="list-style-type: none"> Review of the data Plan for tackling the issues 	
	Any other old business?	Anyone		
	New Business			
		Debra	Gerald attending Key Stakeholders meeting in July	
	Any new business?	Anyone		

2019-07-08

Attendees

Debra, Sharon, Tahir, Ann, Jenn, Phil, Joanne, Darcy, Peter, Jesse, Jason, Huda, Andy

Regrets: Nick, Laura, Frances

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		Welcome Andy and Laura and Huda!	
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> Debra: Hosting contract updates Cornell Data Use and Storage Request Form signed by Gerald and submitted for existing Voyager integration - Phil will submit one for FOLIO. Phil has updated PeopleSoft Executive Committee for our integration. 	
	Old Business			
		Debra	Gerald attending Key Stakeholders meeting in July: talking points	
		Debra /All	Gap Analysis and Capacity Planning <ul style="list-style-type: none"> Review of the data Plan for tackling the issues 	
	Any other old business?	Anyone	Peter: ERM <ul style="list-style-type: none"> putting together Team Grover Contracts signed with EBSCO Looking at off-campus authentication tools (EZ Proxy/Open Athens) Target date: January 1, 2020 	
	New Business			
		Huda /Darcy	Usability Testing Plans <ul style="list-style-type: none"> Circulation and Resource Access would be good places to start Chosen group would help define what tasks they want to test Deb Lamb left the old Voyager testing documents in Box 	Start with Resource Access group.
	Any new business?	Anyone	Data migration updates (Jenn): <ul style="list-style-type: none"> minutes from the full team meeting are here: 2019-07-02 Meeting notes we're still expecting to 5k bibs, holdings, items to review July 15 will be meeting with Access Services this month to work on reference data and mapping also July 15 there will be an update from TAMU on their data migration workflow engine 	
		Debra	No FOLIO Friday in July	
		Jason	Multiple institutions and EBSCO are all working on migration tools;	

2019-07-22

Attendees

Debra, Sharon, Tahir, Jenn, Phil, Darcy, Jason, Frances, Huda, Andy, Laura

Regrets: Ann, Joanne, Nick, Peter, Jesse,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> EBSCO hosting contract <ul style="list-style-type: none"> Counsel's Office review complete Meeting with Privacy Officer tomorrow After this is complete, we will send back to EBSCO for response and updates 	
	Old Business			
		Darcy	Index Data is developing a Course Reserves module - who makes the decision on whether or not we go with a new module that's not part of the core program? Index Data said they would love to get Cornell's use cases. <ul style="list-style-type: none"> We should have representatives on this project team with Index Data. Darcy emailed Andy, Wendy, and Tobi. Target date of September 2019 If we decide to go with this, we will need to do integration between Canvas and FOLIO (replace Ares connection) Kelly Drake from Fenwick is leading this We would love for this to be connected to inventory 	
		Tahir	Zoho projects timeline update (tasks input) <ul style="list-style-type: none"> Need to meet with Andy, Huda, and Laura to onboard them to Zoho and Box folder 	
	Any other old business?	Anyone	Jason - JIRA revision and review of what our requirements are. How are we going to identify what we actually need to have for Go Live - deal breakers not nice-to-haves. <ul style="list-style-type: none"> We should re-prioritize our priorities and make Go-Live requirement equal deal breaker Move everything else to 1 Quarter after (etc.) What workarounds are needed? Debra will schedule a three hour time block in August to look at the updated data <ul style="list-style-type: none"> JIRA Epic owners will do first pass before the meeting and we'll discuss gnarly stuff then 	
	New Business			
		Nick	LTS workflow efforts <ul style="list-style-type: none"> Nick not here. Move to next meeting. 	
		Jenn	Historical data migration, very brief overview <ul style="list-style-type: none"> We need to decide what data we are migrating to FOLIO and what we're leaving behind Phil proposes we do a snapshot and move it Voyager migration left data behind Other institutions that have migrated have said it's not a good idea to migrate a lot of data in, so if we can leave it out, we should Will affect reporting 	
	Any new business?	Anyone	Let's do a Round Robin of where we're all at with our projects.	Table for next time

2019-08-05

Attendees

Debra, Sharon, Ann, Jenn, Phil, Joanne, Darcy, Peter, Jesse, Jason, Frances, Huda, Andy, Laura, Tahir

Regrets: Nick

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • EBSCO hosting contract • Staffing <ul style="list-style-type: none"> • addition of .50 FTE for Development • PM - Tahir 	
	Old Business			
		Jesse /Debra	<p>Cologne meeting debrief</p> <ul style="list-style-type: none"> • MVP presentation; good support for that • OLE being disbanded and OLF is the group now • Budget was discussed; special attention on what has been spent so far 	
		Debra	<p>3 hour August meeting plan</p> <ul style="list-style-type: none"> • Holly and Debra to attend 8/28 LEG • LEG would like to meet with SIG conveners too...who should attend? Changed this to be Implementation Team. <p>Hi All,</p> <p>Huge thanks to Jen for pulling together this spreadsheet and process to help us get ready for our extended session on August 13th!</p> <p>As part of the current re-ranking process in the FOLIO project, the implementation team needs to re-rank issues in their functional areas. This will help us in determining our go/no go criteria, and make sure the project planners have an accurate picture of what we actually need to go live.</p> <p>This workbook (https://cornell.app.box.com/file/499303625621) has two sheets to be used for re-ranking our FOLIO issues:</p> <ol style="list-style-type: none"> 1. Epics - These are areas of work in different functional areas of the FOLIO project . Implementation team members should look through the epics and sign up for the ones that they are willing to make decisions about. You may need to ask others for input, but you're willing to take responsibility for getting that work area ranked. The epics themselves do not get ranked, only the issues they contain. 2. Issues - These are the smaller pieces of work that comprise an epic. After you have selected the epics you are going to work on, you can go to the issues page and filter on "Epic Link" to find issues related to a given epic. These issues are the items that actually need to be ranked in JIRA. Click on the issue "Key" in the first column will take you to the JIRA page for that issue. To update the ranking for an issue, enter the new ranking in the updated rank column using the drop down menu. (If you'd rather edit right in JIRA, Jesse can help you get permissions to do that.) <p>As you rank your issues please:</p> <ul style="list-style-type: none"> - Focus on issues that currently have no ranking - Focus on issues that are currently marked "Go live". Issues should only be marked "go live" for Cornell if they are deal breakers that will actually prevent us from going live with FOLIO. <p>Please select the epics you will work on before our August 5th meeting and complete your re-ranking before our August 13th meeting (if you only complete un-ranked and "go-live" review before that meeting, that's okay).</p> <p>When we meet on the 13th, we can discuss issues that were difficult to rank and/or were unsure if they are go-live requirements. We can also talk about issues where a work-around might decrease our go-live requirements.</p> <p>Thanks! Debra</p>	
	Any other old business?	Anyone		
	New Business			
		Debra	<p>Cataloguing tool issue - how will this be done in FOLIO? (maybe make this a newsletter topic)</p> <ul style="list-style-type: none"> • Jason: the editing environment for MARC data is behind schedule and unlikely to be done • If we have no interface, we can't do that; if there's a bad interface, we can live until it's complete • Jesse: Product Council is keeping an eye on this 	
		Debra	<p>Discovery and Access interface to FOLIO? Indexing process...</p> <ul style="list-style-type: none"> • Frances: concern that FOLIOs database may not allow for the number of same queries (every few seconds) to keep the public interface updated 	

		Debra	<p>FOLIO Friday topic? Newsletter topic?</p> <ul style="list-style-type: none"> • Peter: Project Grover • Get a Save-the-Date out 	
		Debra	<p>WolfCon</p> <ul style="list-style-type: none"> • January 22-24, 2020 - Texas A&M • Tentative who will be attending? 	
		Phil	<p>Robbie mentioned that we're hosting about 4 AWS servers for the FOLIO implementation group that don't seem to be used (in addition to the 2 that are heavily used by the Data Migration folks); = possible waste of some \$ as well as staff time to support them.</p> <p>Could we make it a topic at the next implementation meeting to decide whether we still need those 4 servers? If people want to just "kick the tires," they can simply use the Index Data hosted pubic instance.</p> <p>Thanks!</p> <p>Phil</p>	
	Any new business?	Anyone		

2019-08-12

Attendees

Debra, Sharon, Ann, Phil, Joanne, Peter, Jesse, Jason, Frances, Huda, Andy, Laura, Tahir, Nick, Darcy

Regrets: Jenn,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> EBSCO hosting contract 	
	Old Business			
		Peter	FOLIO Friday <ul style="list-style-type: none"> Peter: Project Grover Coffee and cookies are ordered 	
		Debra	3 Hour Meeting: <ul style="list-style-type: none"> https://cornell.app.box.com/file/499303625621 Fruit and cookies will be there...bring a drink! Any issues to discuss before tomorrow? Agenda: <ul style="list-style-type: none"> First two hours: Each Epic owner run the group through any issues or discussion points Last hour: set agenda for meeting with LEG <ul style="list-style-type: none"> Here's what we committed to Development & here's what we've committed to Implementation What is our decision-making process over the next couple of weeks? Discussion of any issues Jason - Cataloging tool issue Frances - Discovery and Access interface to FOLIO? Sharon - reporting? Open Source approach (the difference between Kuali implementation and FOLIO) If we commit to next July, what does Cut Over look like? 	
	Any other old business?	Anyone	Sharon: Reporting <ul style="list-style-type: none"> Reporting structure issue 4 dependencies that are not going to be addressed by Development by January As a result, looking at a different way to deliver the data warehouse Do we, as an institution, want to push back on FOLIO Development to deliver the star schema? Expected uptick in Voyager reports post-implementation, because Voyager data will need to be accessed via reporting as we will not have use of the Voyager client 	
	New Business			
		Debra	WolfCon <ul style="list-style-type: none"> January 22-24, 2020 - Texas A&M Tentative who will be attending? https://cornell.app.box.com/file/502902138223 	

		Phil	<p>Robbie mentioned that we're hosting about 4 AWS servers for the FOLIO implementation group that don't seem to be used (in addition to the 2 that are heavily used by the Data Migration folks); = possible waste of some \$ as well as staff time to support them.</p> <p>Could we make it a topic at the next implementation meeting to decide whether we still need those 4 servers? If people want to just "kick the tires," they can simply use the Index Data hosted public instance.</p> <ul style="list-style-type: none"> • We'll just keep it until we sign the EBSCO contract 	
	Any new business?	Anyone	<p>Nick: joined Texas A&M sprint</p> <ul style="list-style-type: none"> • investigating using workflow for data migration - we're not interested in that, but we are interested in using workflow for our day-to-day work (ETL needs) 	

2019-08-19

Attendees

Debra, Sharon, Ann, Phil, Joanne, Jason, Andy, Laura, Jenn, Darcy, Jesse, Tahir, Darcy

Regrets: Huda, Peter, Frances, Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> EBSCO hosting contract <ul style="list-style-type: none"> In Purchasing 	
	Old Business			
		Peter /Debra	FOLIO Friday - debrief <ul style="list-style-type: none"> Thoughts on September FOLIO Friday? Should it be an overview of our "commitment" decision and risk mitigation plans? FOLIO Newsletter for August? <ul style="list-style-type: none"> Capacity planning, re-ranking go-lives, development timeline, ect. ERM/FOLIO Friday recap 	
		Debra	LEG Meeting debrief <ul style="list-style-type: none"> https://cornell.app.box.com/file/499303625621 	
	Any other old business?			
	New Business			
		Debra	MVP vs Cornell Go-Live Requirements https://docs.google.com/document/d/1futeUb5rkQ6tO4fRlC9RszpZ_7IWYADhx4iskIHfyG8/edit <ul style="list-style-type: none"> Everyone go through their items (115 total for Cornell); complete MVP worksheet instructions Bring recommendation and/or discussion items to 8/26 meeting Appears that some Mandatory features are on the non-MVP tab. Jesse will confirm with Holly whether or not this is accurate. 	
		Jenn	Sandbox update - see email. 2.2 box will shut down at the end of the day on Sept 3!	
	Any new business?			

2019-08-26

Attendees

Debra, Sharon, Ann, Phil, Andy, Laura, Jenn, Jesse, Peter, Frances, Huda, Nick

Regrets: Joanne, Jason, Darcy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> EBSCO hosting contract 	
	Old Business			
		Debra		
	Any other old business?		MVP vs Cornell Go-Live Requirements https://docs.google.com/document/d/1futeUb5rkQ6tO4fRLC9RszpZ_7IWYADhx4iskIHfyG8/edit <ul style="list-style-type: none"> Everyone go through their items (115 total for Cornell); complete MVP worksheet instructions Bring recommendation and/or discussion items to 8/26 meeting Appears that some Mandatory features are on the non-MVP tab. Jesse will confirm with Holly whether or not this is accurate. 	
	New Business			
		Debra	What is our recommendation? What else do we want to communicate to LEG? <ul style="list-style-type: none"> Submit No items to Development Team - Jesse 	
	Any new business?			

2019-09-09

Attendees

Debra, Sharon, Ann, Phil, Andy, Laura, Jenn, Jesse, Peter, Frances, Huda, Jason, Darcy

Regrets: Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> • EBSCO hosting contract • LEG Meeting debrief 	
	Old Business			
		Debra	What to do about FOLIO Friday this month? Newsletter? <ul style="list-style-type: none"> • See if Computer Lab is available • Do a sandbox hands-on demo day • Darcy willing to do Circ • Debra will collect feedback • Jesse will help demo and Peter 	
	Any other old business?			
	New Business			
		Debra	Go-Live Scenario planning for LEG	
		Jenn	Data Migration updates: <ul style="list-style-type: none"> • sb3.1 is the only sandbox now. We are adding more and more users, I've put some language in box for how to talk about the sandbox with folks so they understand it is an ephemeral work in progress. Please send new user requests to me and Robbie (who is adding them to the scripts for migration between boxes). I can add users through the front end while Robbie's on vacation. • Joe is in the process of mapping/getting ready to load the circulation transactions to the FOLIO loans. Frances is working on the holdings model especially with regard to bound withs. • If we have requested feedback from you about data, please respond as soon as you can, it keeps us moving forward 	
	Any new business?		Time permitting: Quick overview of usability discussions. Question regarding what areas to review next?	

2019-09-16

Attendees

Debra, Sharon, Ann, Phil, Laura, Jenn, Jesse, Peter, Huda, Darcy, Nick, Andy

Regrets: Jason, Frances

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> • EBSCO hosting contract • Homework: <ul style="list-style-type: none"> • 1st Quarter items <ul style="list-style-type: none"> • No 1st Q: 1st Q should be Go-Live or 2nd Q • LEG Scenarios 	
	Old Business			
		Debra	Are we ready for FOLIO Friday? <ul style="list-style-type: none"> • Uris B05 Computer Lab is available • Do a sandbox hands-on demo day • Darcy willing to do Circ • Sharon will collect feedback • Jesse will help demo and Peter • Debra can't be there since the time changed to 1pm • Darcy and Jenn meeting to prep at 3pm in 111a today, feel free to join 	
	Any other old business?		WolfCon <ul style="list-style-type: none"> • Go ahead and book travel - L85 3737 • Peter thinking of putting together presentation on ERM - Project GROVER • Sharon submitting a proposal for training; submission already in for plenary session for reporting 	
	New Business			
		Sharon	Reporting updates: Snapshot <ul style="list-style-type: none"> • How are we going to capture historical data at Cornell? • Met with functional representatives • Proposal is to do a snapshot and save it in Post SQL 	
	Any new business?			

2019-09-30

Attendees

Debra, Sharon, Ann, Laura, Jenn, Peter, Andy, Jason, Frances, Jesse, Huda, Darcy,

Regrets: Phil, Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none">• EBSCO hosting contract• Debrief of FOLIO Friday Feedback• Newsletter will have to be September/October 😊• October FOLIO Friday is October 18th - Debra is not here, I would like to move it to the 25th...thoughts? Discuss Go/No-Go decision and MVP? - MOVE IT	
	Old Business			

	<p>Debra</p> <p>Prep for Oct 2nd LEG meeting</p> <p>I just sent this email to the Product Council. We aren't sending out an official spreadsheet this time, preferring that each institution use the dashboard (see info below) to gather the latest information when they need it, by I did make a spreadsheet if you want to use it. It's at https://docs.google.com/spreadsheets/d/1ekZBfIV-gBzeitq6asODio9QOp9GX1W4-nrXcKG6Amc/edit?usp=sharing</p> <p>Best,</p> <p>Holly</p> <p>P.S. Jesse, I know you would have shared this with the team, but I wasn't sure if you were in meetings or what not and wanted to get it to Debra ASAP.</p> <p>From: Holly L. Mistlebauer Sent: Tuesday, September 24, 2019 5:05 PM To: FOLIO PRODUCT COUNCIL (product-c@ole-lists.openlibraryfoundation.org) <product-c@ole-lists.openlibraryfoundation.org> Subject: MVP Feature List Finalized Importance: High</p> <p>Dear Product Council,</p> <p>The MVP feature list has been finalized. We have created a JIRA Dashboard that is available for everyone to use. It is named FOLIO Q4 (left) MVP (right) Dashboard. As the name (hopefully) implies, the left side of the dashboard contains information about the Q4 2019 (Edelweiss) release and the right side of the dashboard contains information about the entire MVP.</p> <p>The direct URL to the dashboard is https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=10703. You can also find it by selecting from the purple top banner in JIRA, then selecting Manage Dashboards. Within Manage Dashboards, click on the Search option on the left and then the Search button on the right as shown below...</p> <p>FOLIO Q4 (left) MVP (right) Dashboard will appear towards the bottom of the list. Simply click on the star to the left of the dashboard to make it a "favorite." After following this step, FOLIO Q4 (left) MVP (right) Dashboard will appear when you select</p> <p>If you would like to create an Excel spreadsheet of the MVP, like the one Holly usually sends out, simply open the FOLIO Q4 (left) MVP (right) Dashboard and click on the 239 that appears as in the first filter on the right side of the dashboard. This will open all 239 MVP features in JIRA.</p> <p>Select Export, then Excel as shown below to create the spreadsheet...</p> <p>This was due tomorrow, so you have been given an extra day to review it. J We will answer questions at the PC meeting on Thursday. The current deadline for each institution to decide to go-live in 2020 is October 2 (next week).</p> <p>Best regards,</p> <p>The Capacity Planning Team</p> <p>(Cate, Harry, Holly, Jakub, Mark and Mike)</p>	
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	Jesse	<p>MVP:</p> <p>CUL FOLIO Implementation Team,</p> <p>Due to a few decisions made at recent Product Council meetings, combined with my efforts to plan to address lacking functionality for acquisitions and ERM related areas, there are a few things I want to make sure you all know:</p> <p>What it/isn't MVP?</p> <p>First off, the MVP is set and all features targeted for the MVP are now labelled as such. In addition, several development teams are not working through the capacity planning process in the same way. To provide some clarity for how those groups are fitting into the MVO, they should be labelling their MVP features with "team-mvp". So, any features labelled cap-mvp or team-mvp are slated to be available by the end of December, 2019.</p> <p>Needed 1st quarter – These will definitely not all be done within a quarter after we implement. The most appropriate way to think about these is as features we can get away with for some time after we go live, but will have some potential repercussions, back-logs, or other costs associated with lacking the feature. The Capacity Planning Team, Product Council, and the implementing libraries will work to prioritize these and other Post-MVP Priorities, or PMP, features as implementations move along. I would consider out must have by fiscal year end features as in this same general category. PMP label = this is currently targeted as a "post-MVP priority" – These are not settled and will be fully prioritized based on the full list of libraries that intend to go live and their remaining Go Live and 1st quarter issues. If we are formally a Go Live library, we will get more say in how and when these features come about. The items marked with PMP already are things that probably should have been MVP, but just didn't fit into the capacity available.</p> <p>Chalmers_debut_followup – These are some of the higher priority items identified by Chalmers as they go live this month. These are getting labelled with "Chalmers_debut_followup". I assume these get a certain amount of priority, but have not confirmed that yet.</p> <p>So, with much of the above in mind, I set up two new filters to make sure we can easily see how our Go Live and Post-MVP priorities line up with the MVP. These are the things we need to have written explanations for LEG about how we can deal with the absence of the feature.</p> <p>These two filters should show all of the issues that we need to have a plan for. They show features that are not labelled for the cap-mvp or team-mvp where Cornell still ranks them as either Go Live or Needed 1st quarter:</p> <p>- Cornell - Go-live - non-MVP - https://issues.folio.org/issues/?filter=11802 - Cornell - 1st Quarter - non-MVP - https://issues.folio.org/issues/?filter=11803 – This one does not include the Can wait until Fiscal Year rollover items yet.</p> <p>As of 2:00 on Friday, I see 20 features listed as Go Live that are not part of the MVP. I may have issued a few versions of re-ranking, so there may be a few that are still incorrectly labelled as Go Live. There are also a few in here that are somewhat dependent on the dev teams that are not part of the capacity plan, such as Library Data Platform, Lehigh (focusing on NCIP), and MARCCat. If you see any in this list that you feel are incorrect, please either update the Cornell ranking, or let me know and I will.</p> <p>Also as of 2:00 on Friday, we have 62 – needed one quarter after go live with the same caveats as the Go Live ones.</p> <p>And here is the big surprise: Something we haven't looked at in a while...newly added features that we have never ranked. We currently have 115 of these as of 2:00 on Friday. The vast majority were added since June, but some are older. These older ones must be features that were not part of the UXPROD section until recently. Many of these are already labelled as cap-mvp or team-mvp, meaning they are part of the MVP version. In fact, when I filter out the ones that are not already labelled as cap-mvp or team-mvp, I get 51 remaining ones. Upon a cursory glance, I am not seeing any showstoppers, but we should review these to make sure we don't miss any key functions that LEG would need to know about.</p> <p>You can use this filter to see all of the "unranked by Cornell" features: https://issues.folio.org/issues/?filter=10918.</p> <p>That's all for now. Please let me know if you have questions or concerns.</p> <p>Jesse</p>	
Any other old business?	Sharon	<p>Snapshot for historical data access</p> <ul style="list-style-type: none"> Looking at MARC data to see what tables are needed to query that data Looking for ways to accomplish this 	
	Ann	<p>Finance app not done for Q3. Will be done for Q4.</p> <ul style="list-style-type: none"> Other note: there is no mid-release for Q4 	
New Business	Debra	DRAFT - 2021 Implementation - Staffing Budget	

	Peter	<p>Debra –</p> <p>I've come across a concern with our process of setting up FOLIO, and would appreciate some feedback.</p> <p>Our FOLIO ERM is currently running on the Cornell instance, at https://folio-2019q3.1-sb1.library.cornell.edu/. That instance is connected to our EBSCO knowledgebase through the eHoldings app. With the API, any instance of FOLIO could be connected to our EBSCO knowledgebase. As part of Project GROVER, we plan to export all of our holdings from our Serials Solutions service, on October 1, and give that to EBSCO, who will use it to update their information about our e-holdings, in their eHoldings Management knowledgebase. It will take EBSCO about two weeks to update all that information in their knowledgebase, and then from about October 15 we will manage our e-resources in EBSCO, rather than in Serials Solutions. (But until early Jan, the Serials Solutions knowledgebase will still power various other products, so we'll also update important content in Serials Solutions, as needed.)</p> <p>I realized, though, that we can't really start recording any ERM work in FOLIO because the Cornell-hosted FOLIO instance won't be the live CUL FOLIO instance. I imagine we still may have not gotten the EBSCO FOLIO contract signed. And we're still a week out from getting a definite commitment to eventually make a definite decision. But in the end, the live CUL FOLIO instance will be hosted and managed by EBSCO.</p> <p>So, my question is, do you have a sense for when and where will we have a production FOLIO instance that e-resources can use for recording ERM data, and which we know won't get over-written or deleted, as new releases appear? We're getting ready to go live with FOLIO ERM soon, but I realized that I don't know where the instance that we'll use is or will be located.</p> <p>I hope I'm making sense, but fear I may not be.</p> <p>Peter McCracken Electronic Resources Librarian Cornell University phm64@cornell.edu (607) 255-1892 Pronouns: he/him/his</p> <ul style="list-style-type: none"> • Peter, Jenn, Phil, and Jesse should meet to discuss and plan 	
	Any new business?		

2019-10-07

Attendees

Debra, Sharon, Ann, Phil, Laura, Jenn, Jesse, Peter, Darcy, Andy, Jason, Huda, Nick,

Regrets: Frances

Discussion Items

Time	Item	Who	Notes	Actions
	House keeping			
	Announcements			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> EBSCO hosting contract 	
	Old Business			
		Debra	<p>LEG Meeting Debrief and Plan</p> <p>Update Staffing Document: https://docs.google.com/spreadsheets/d/1ckmBZbTV38QaRzkvBJ3pXvEE-TqN5k-av_E6Fdp6iQ/edit#gid=554061062</p> <ul style="list-style-type: none"> Add .5 FTE Reporting Keep .5 FTE Project Management Add .5 LTS Workflows developer (John) Add .5 Amy Blumenthal for RA training coordination Remove Line 24 LTS Cataloger Backfill 	
		Jesse	<p>And here is the big surprise: Something we haven't looked at in a while...newly added features that we have never ranked. We currently have 115 of these as of 2:00 on Friday. The vast majority were added since June, but some are older. These older ones must be features that were not part of the UXPROD section until recently. Many of these are already labelled as cap-mvp or team-mvp, meaning they are part of the MVP version. In fact, when I filter out the ones that are not already labelled as cap-mvp or team-mvp, I get 51 remaining ones. Upon a cursory glance, I am not seeing any showstoppers, but we should review these to make sure we don't miss any key functions that LEG would need to know about.</p> <p>You can use this filter to see all of the "unranked by Cornell" features: https://issues.folio.org/issues/?filter=10918.</p> <ul style="list-style-type: none"> Jesse will send out filtered list weekly We need to prioritize by the end of October 	
		All	<p>WolfCon - who's attending</p> <p>We have a total \$25,000. We have spent \$13,500 on training and travel already this year (John, Jesse, Gerald).</p> <ul style="list-style-type: none"> We'll send SIG Conveners definitely. Product Owners, if possible. We can decide once we have a WolfCon agenda 	
	Any other old business?			
	New Business	All	<p>What needs to start happening ASAP?</p> <ul style="list-style-type: none"> CIT Integrations - yes, they will begin work in January 2020 Formal agreement with Index Data for OCLC connect - scoping should be completed this week ??? 	

		Nick	Where are we tracking things? JIRA? Zoho? <ul style="list-style-type: none"> • People need to go into Zoho and update 	
		Jesse	Product Council update: <ul style="list-style-type: none"> • Looking for Product Owners for 7 areas (3-4 priority areas) 	
	Any new business?			

2019-10-21

Attendees

Debra, Sharon, Ann, Phil, Laura, Jenn, Jesse, Peter, Darcy, Andy, Jason, Huda, Nick, Frances

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> EBSCO hosting contract 	
	Old Business	Debra	LEG Go Live Decision	
		Debra	Review Staffing Spreadsheet for 2021 by Wednesday, October 23 Update Staffing Document: https://docs.google.com/spreadsheets/d/1ckmBZbTV38QaRzkvBJ3pXvvEE-TqN5k-av_E6Fdp6iQ/edit#gid=554061062	
		All	WolfCon - Is there an agenda?	
	Any other old business?			
	New Business		Agenda for next week? <ul style="list-style-type: none"> User Testing Report Project Plan (Zoho) - what needs to be changed/updated 	
	Any new business?			

2019-10-28

Attendees

Debra, Sharon, Ann, Phil, Laura, Jenn, Jesse, Peter, Darcy, Huda, Nick, Frances

Regrets: Jason, Andy

Discussion Items

Time	Item	Who	Notes	Actions
	House keepin g			
	Annou nceme nts			
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Training/Travel has been raised to \$50,000 for this fiscal year and next Fall FOLIO Newsletter is sent FOLIO Re-Charter EBSCO Hosting FOLIO Friday debrief <ul style="list-style-type: none"> 31 in the room; 20 on Zoom 	
	Old Busine ss			
	Any other old busine ss?			
	New Busine ss	Huda	<ul style="list-style-type: none"> User Testing Report <p>As mentioned in yesterday's meeting, the Usability Working Group finished usability testing focused on circulation /access.</p> <p>I've updated the wiki (https://confluence.cornell.edu/pages/viewpage.action?pagelD=375164025) to include this link to the report (https://confluence.cornell.edu/download/attachments/375164025/2019_09_FOLIO_Circulation%20Report.pdf?version=1&modificationDate=1571764227160&api=v2). The tasks and questions are at the end of the report and are in the order they were asked (so the number in the label does not reflect the actual sequence).</p>	
		Debra /All	<ul style="list-style-type: none"> Project Plan (Zoho) - what needs to be changed/updated 	Tabled for next meeting
		Debra	<p>FOLIO Implementation Team cataloging integrations:</p> <p>https://docs.google.com/spreadsheets/d/1O8orRx2dBedaeWIkbn30v2ZHyRG6BgeclXgy5xL35bQ/edit#gid=1845791394</p>	
	Any new busine ss?	Jesse	UNAM fees and fines dev team suddenly reassigned.	

2019-11-04

Attendees

Debra, Sharon, Ann, Phil, Laura, Jenn, Peter, Nick, Frances, Andy, Darcy, Huda

Regrets: Jason, Jesse,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> FOLIO Re-Charter EBSCO Hosting 	
	Old Business	Jenn	Poked Index Data about the import/export OCLC project	
	Any other old business?			
	New Business	Debra	<ul style="list-style-type: none"> November FOLIO Friday Topic? UI changes to Inventory; GROVER update; Data Migration updates; Reporting Update; RA updates 	
		Debra /All	<p>WolfCon:</p> <p>We are taking suggestions for FOLIO agenda items at WOLFCon in January. We are asking for both FOLIO plenary ideas and small group sessions, such as SIG F2F meetings. If you think you might need to meet but aren't sure, please submit the proposal anyway, we'll ask for final decisions in December.</p> <p>Please submit FOLIO Plenary suggestions here</p> <ul style="list-style-type: none"> Sharon: library data management system update Peter: Project GROVER <p>Please submit FOLIO meeting requests through this link</p> <ul style="list-style-type: none"> Sharon: training sessions on reporting and setting up your data warehouse 	
		Debra /All	<ul style="list-style-type: none"> Project Plan (Zoho) - what needs to be changed/updated <ul style="list-style-type: none"> Have Tasks and dependencies in/updated by December 20, 2019 	
	Any new business?	Andy	Documentation	
		All	FOLIO Implementation branding	

2019-11-18

Attendees

Debra, Phil, Laura, Jenn, Peter, Nick, Andy, Jason, Jesse, Ann, Darcy, Frances, Huda

Regrets: Sharon

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Peter	We are using FOLIO ERM!!!!!! The interface, but we're cool! Folks report that they prefer the FOLIO interface to the EBSCO interface. Yayyy!!!	
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> FOLIO Re-Charter EBSCO Hosting 	
	Old Business	Debra	FOLIO Friday debrief <ul style="list-style-type: none"> December FOLIO Friday - CANCEL January will be MVP update/demo Newsletter: Peter ERM 	
		All	WolfCon	
		All	FOLIO Implementation branding <ul style="list-style-type: none"> Logo? Talk with Zsuzsa about a communication framework/strategy <ul style="list-style-type: none"> Lack of knowledge in CUL about "why" we went with FOLIO Why was this a good investment How do we successfully talk about the development efforts we've taken - separate from implementation 	
		Jenn	OCLC update (Index Data): will try to use Cornell's OCLC Contact to move the project forward	
	Any other old business?			
	New Business	Jason	LTS FOLIO Steering group will be jumping in to Zoho	
		All	Training <ul style="list-style-type: none"> Repository location(s) Confluence? 	
		Jenn	Jenn and Jess met with D&A about how things are going to get updated - D&A has a sprint in January that we need to be able to tell them what to do for	
	Any new business?			

2019-12-16

Attendees

Debra, Phil, Laura, Peter, Nick, Jason, Jesse, Darcy, Sharon, Jenn, Ann, Huda

Regrets: Andy, Frances

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra /Jesse	<p>MVP</p> <ul style="list-style-type: none"> Will not be delivered as scoped in December Holly working on a revised capacity plan that will be good for releases through Summer 2020 	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Re-Charter <ul style="list-style-type: none"> ITGC meeting is December 18, 2019 EBSCO Hosting <ul style="list-style-type: none"> We will revisit this decision in January Meeting with Zsuzsa: <ul style="list-style-type: none"> Do a newsletter....what is FOLIO and why are we moving to FOLIO – BIG PICTURE. One sentence, pithy, and catchy. <ul style="list-style-type: none"> Dedicate a January meeting to this topic Devote a FOLIO Friday and/or Newsletter to the WHY topic Sit down with Zsuzsa for a chunk of time with a sub-group of Implementation and map out a communication plan and Jose - volunteers? <ul style="list-style-type: none"> Jason, Andy, Darcy, Debra OCLC - Index Data: <ul style="list-style-type: none"> Index Data is working around OCLC for the Push - have to wait to hear back from OCLC to do the Pull Still do not have a formal estimate for \$ 	
	Old Business	Debra	<p>Newsletter: Peter ERM</p> <ul style="list-style-type: none"> Hold until big announcement in January 	
		Debra	<p>Training Repository Framework</p> <ul style="list-style-type: none"> https://confluence.cornell.edu/display/folio 	
	Any other old business?	Andy	<p>Zoho Projects</p> <ul style="list-style-type: none"> Deadline end of February 2020 Phil will help Andy 	
	New Business	Sharon	<p>New demo environment for Library Data Platform</p> <ul style="list-style-type: none"> Does not 	
		Peter	<p>Gave a talk at the University of Washington</p> <ul style="list-style-type: none"> Well received! 	
		Darcy	<p>Attended CNI</p> <ul style="list-style-type: none"> Lack of awareness of FOLIO 	

		Jesse	Post-OLE organizational structure <ul style="list-style-type: none"> • Will be presented at WolfCon 	
	Any new business?	Sharon	WolfCon remote attendance	

2020

2020-01-06

Attendees

Debra, Phil, Laura, Peter, Nick, Jason, Jesse, Darcy, Sharon, Jenn, Ann, Huda, Andy,

Regrets: Frances

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none"> Zoho Projects <ul style="list-style-type: none"> Deadline end of February 2020 	
	Action items from last meeting	Debra	OPEN ACTION ITEMS <ul style="list-style-type: none"> FOLIO Re-Charter - approved! FOLIO S-PAR <ul style="list-style-type: none"> Requesting Capital Funds Being submitted today - will know by the end of the month for this fiscal year Next fiscal year funds will be decided in the Spring Meeting with Zsuzsa: <ul style="list-style-type: none"> Jason, Andy, Darcy, Debra Scheduled for January 30th 	
		Phil	Voyager migration <ul style="list-style-type: none"> Monday, January 13th 	
	Old Business	Jesse	Any updates on Capacity Plan/MVP? <ul style="list-style-type: none"> No update on when new capacity plan/MVP will be presented Edelweiss release scheduled for January 19th Chicago assessment of MVP gaps: https://docs.google.com/spreadsheets/d/18q9RF32g2xRcFTisN7azlJBgoukjp6/edit#gid=1294772421 	
		All	WolfCon - any questions, concerns, updates?	
		Peter	ERM update <ul style="list-style-type: none"> EBSCO Discovery Service and ERM can go live separately Plan to update public facing links on January 15th 	
	Any other old business?	Jenn	Index Data has signed contract with OCLC	
	New Business	Phil	Australia Library visit <ul style="list-style-type: none"> Voyager Shop Visiting January 14-15 	
		All	Next meeting - would anyone like to do a sub-group update?	
	Any new business?			

2020-01-27

Attendees

Debra, Phil, Laura, Jason, Darcy, Sharon, Ann, Huda, Andy, Jesse, Jenn,

Regrets: Nick, Frances, Peter,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none"> Zoho Projects <ul style="list-style-type: none"> Deadline end of February 2020 WolfCon debrief <ul style="list-style-type: none"> Laura - productive conversation around CODEX Sharon - mix of reporting and integrations; benefits of side conversations Ann - Resource Management meetings went well; batch loading won't be available until Q3 Jason - 1 hour time slots were not as productive; talked about integrations in Metadata Management forums; Peter did a GREAT job on ERM presentation Darcy - Resource Access sessions were good; saw a demo of the Course Reserves module; push the agenda to include a half day "newcomers welcome"; Implementers Session was good - would like to see more of that at Cornell regarding project plans (esp. Duke's) Jenn - Data Migration - a working session would have been good; It Takes A Village Andy - attended some virtually; Jesse - PC; governance model updates; succession planning for SIG conveners; describing role of a SIG member 	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Meeting with Zsuzsa: <ul style="list-style-type: none"> Jason, Andy, Darcy, Debra Scheduled for January 30th 	
		Phil	<p>Voyager migration - updates</p> <ul style="list-style-type: none"> Monday, January 13th Will be doing some lessons learned from this migration 	
	Old Business	Jesse	<p>Any updates on Capacity Plan/MVP?</p> <p>https://docs.google.com/spreadsheets/d/1HERxB2GXMr9ZcZ9JpJypWSZgs9Z8jRbKSwW2f-LG0bY/edit#gid=1295323499</p> <ul style="list-style-type: none"> Edelweiss released on January 10th 	
		Peter	ERM update - TABLED until next meeting	
		All	<p>FOLIO Friday: who would like to speak</p> <ul style="list-style-type: none"> Sharon - reporting sessions Peter - ERM Jesse - Product Council & FOLIO Development Jason - Metadata Management <p>Future Topic: High level what is FOLIO; platform; construction (Zach Burke and Jenn)</p>	
	Any other old business?			
	New Business	Debra /All	<p>Hosting Evaluation</p> <p>https://cornell.app.box.com/file/596483528869</p>	
		Darcy /Nick	LTS Workflows Update - TABLE UNTIL NEXT TIME	

	Any new business?			

2020-02-03

Attendees

Debra, Phil, Laura, Jason, Sharon, Ann, Jenn, Frances, Peter, Darcy,

Regrets: Huda, Andy, Jesse, Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none"> Zoho Projects Deadline end of February 2020 	
	Action items from last meeting	Debra	<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Meeting with Zsuzsa: <ul style="list-style-type: none"> Jason, Andy, Darcy, Debra https://cornell.app.box.com/file/608015364294 	
	Old Business			
		Peter	<p>ERM update</p> <ul style="list-style-type: none"> Meeting this afternoon to figure out and resolve challenges Live-ish Hopefully using it in 2-3 weeks 	
		All	<p>FOLIO Friday January Debrief</p> <ul style="list-style-type: none"> Speakers were positive and energetic <p>FOLIO Friday February:</p> <ul style="list-style-type: none"> Huda - User Testing - in Mann 160 <p>March:</p> <ul style="list-style-type: none"> Robbie Douglass - FOLIO Technical Architecture 	
	Any other old business?	Laura	<p>OCLC import/export - expect pricing soon</p> <p>Also will get a demo of MARCcat</p>	
	New Business	All /Jason	<p>Edelweiss testing environment for more people - APRIL</p> <ul style="list-style-type: none"> Getting people access to a working FOLIO sandbox Encouraging people to use it (and enter bug reports) Communicate with folks that they can do this (let them know what works and what doesn't) 	
		Darcy	<p>LTS Workflows Update</p> <ul style="list-style-type: none"> Nick was finalizing inventory Understanding why we're doing certain things (like FTP) and is there a more modern way of doing them 	
			<p>Targeted Open Forums - APRIL</p> <ul style="list-style-type: none"> Schedule in Labs (Mann and Uris) 	
	Any new business?	Darcy	JIRA platform for bug reporting is supposed to be being created	

		Sharon	Reporting update	
			<ul style="list-style-type: none">• Version .4 beta LDP is being released	

2020-02-10

Attendees

Debra, Laura, Sharon, Ann, Jenn, Frances, Peter, Darcy, Andy, Jesse, Jason, Huda,

Regrets: Nick, Phil,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none"> Zoho Projects Deadline end of February 2020 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> February FOLIO Friday - Combine with March Zsusza - Communications update <ul style="list-style-type: none"> Unable to get a response from EBSCO Gathered up some stuff and will have something for us to review (poster) in a week or two EBSCO Hosting 	
	Old Business	Sharon	FOLIO Forum on Reporting and LDP coming up	
		Debra /Peter	ERM update <ul style="list-style-type: none"> Celebration planned for March 4th 	
		Jason /Laura	OCLC import/export <ul style="list-style-type: none"> Quote for \$48,000 Jason has sent out to other groups for financial contribution (Duke, Lehigh, Texas A&M, Chicago) 	
	Any other old business?			
	New Business	Debra	<p>The Product Council just met and decided to change what we are calling things. What we were calling Round III yesterday is now Round IV.</p> <p>Round I = Chalmers</p> <p>Round II = Requirements listed at https://wiki.folio.org/x/WgMuAg, but not all of MVP (mid-2020)</p> <p>Round III + MVP = What we were calling MVP (end of 2020)</p> <p>Round III = MVP+</p> <p>https://wiki.folio.org/display/COHORT2019/Round+III</p> <p>Added by Jesse:</p> <p>Confirming if CUL needs are planned for 2020:</p> <p>https://docs.google.com/spreadsheets/d/1HERxB2GXMr9ZcZ9JpJypWSZgs9Z8jRbKSwW2f-LG0bY/edit#gid=1676196704</p> <p>- Separate tabs for MVP schedule and non-MVP planned for 2020</p> <ul style="list-style-type: none"> Does what is prioritized here address our concerns? i.e. - what we indicated to LEG as go-live needs: https://cornell.app.box.com/file/536196091972 	

		Debra	FOLIO Fameflower (Q1 2020) Release Milestones: March 3 - Platform release deadline March 13 - Module release deadline March 23 - 27 : Bugfest (testing) March 23 - April 6: Bug fixing April 10 - Release is public	
	Any new business?			

2020-02-24

Attendees

Debra, Laura, Sharon, Ann, Jenn, Darcy, Andy, Jesse, Jason, Frances, Huda

Regrets: Nick, Phil, Peter

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none"> Zoho Projects <ul style="list-style-type: none"> Deadline end of February 2020 Sharon - great job on the reporting/LDP Folio Forum! 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> February FOLIO Friday - Combine with March Zsusza - Communications update EBSCO Hosting Index Data OCLC project 	
	Old Business			
		Peter	ERM update <ul style="list-style-type: none"> Celebration planned for March 4th 	
	Any other old business?			
	New Business	Jesse	<p>The Product Council just met and decided to change what we are calling things. What we were calling Round III yesterday is now Round IV.</p> <p>Round I = Chalmers</p> <p>Round II = Requirements listed at https://wiki.folio.org/x/WgMuAg, but not all of MVP (mid-2020)</p> <p>Round III + MVP = What we were calling MVP (end of 2020)</p> <p>Round III = MVP+</p> <p>https://wiki.folio.org/display/COHORT2019/Round+III</p> <p>Added by Jesse:</p> <p>Confirming if CUL needs are planned for 2020:</p> <p>https://docs.google.com/spreadsheets/d/1HERxB2GXMr9ZcZ9JpJypWSZgs9Z8jRbKSwW2f-LG0bY/edit#gid=1676196704</p> <p>- Separate tabs for MVP schedule and non-MVP planned for 2020</p> <ul style="list-style-type: none"> Does what is prioritized here address our concerns? i.e. - what we indicated to LEG as go-live needs: https://cornell.app.box.com/file/536196091972 	

		Jenn	<p>Could we add an agenda item about the April sandbox to the next meeting. My specific questions are:</p> <ul style="list-style-type: none"> • What version will it be? • What will the team want in terms of users? (Fameflower is April 10, we'd want two weeks of padding at least if that's release we want to go with, so end of April would be the timeline) • Are there specific data types we have not yet loaded that people want to see (and can identify quickly)? • Will the communications working group handle communications around it? <p>FOLIO Fameflower (Q1 2020) Release Milestones: March 3 - Platform release deadline March 13 - Module release deadline March 23 - 27 : Bugfest (testing) March 23 - April 6: Bug fixing April 10 - Release is public</p>	
		Debra	<p>Next steps for April?</p> <ul style="list-style-type: none"> • When to schedule "hands-on" time for CUL? What topics? • Call it "get acquainted with FOLIO" <ul style="list-style-type: none"> • April 24th and after • People sign up for trainings • Schedule 6 sessions for 90 minutes each • People must REGISTER to attend (so we can create accounts for them and give them permissions) <ul style="list-style-type: none"> • signupgenius.com • Topics <ul style="list-style-type: none"> • Access Services (2 sessions) • Technical Services (2 sessions) • Public Services colleagues (1 session) 	
			<p>Training:</p> <ul style="list-style-type: none"> • Lab of O MOU 	
	Any new business?			

2020-03-02

Attendees

Debra, Laura, Sharon, Ann, Jenn, Darcy, Andy, Jesse, Huda, Phil, Peter, Frances,

Regrets: Nick, Jason,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none">Zoho Projects<ul style="list-style-type: none">Deadline was end of February 2020Status?	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none">March FOLIO Friday<ul style="list-style-type: none">Jesse will lead it; Phil will co-supportMannDarcy, Robbie, HudaWhat would you like the Save-the-Date to say in terms of topics?<ul style="list-style-type: none">Infrastructure - high level technical architecture overviewUsability testing overview of results and plansFOLIO Bug Reporting processPosters are being printed!ERM Celebration March 4thEBSCO HostingIndex Data OCLC project	
	Old Business			

	Jesse	<p>NOTE: Team will meet March 16, 23, and 30 without Debra to finalize this. Jesse will lead these meetings.</p> <p>I modified or created some Jira filters to hopefully give us an easier view of things. In particular, I added Fix Version to the fields that display on the results screen. This is the quarter that the feature is currently scheduled to be completed. This is aspirational, based on capacity and time commitment estimates, but is the only thing we really have to go on for whether the feature is really being planned for or not at this point. If this field is blank, it is currently not slated for development in Q1-4 2020. Some other relevant fields in these filters:</p> <ul style="list-style-type: none"> • Epic – a helpful field for figuring out which features might pertain to your area of expertise. This is far from perfect, for many reasons, so please browse the lists to make sure you aren't missing things that are important to your areas. • Label – this is also useful for identifying what functional area a feature is most relevant for. In addition, this is where the POs include indicate features that are slipping gfrom quarter to quarter, and a few other indicators of status. • Status – for the UXPROD items we are addressing, status should mean: <ul style="list-style-type: none"> • Open - Ready for development • Draft - Product owner still drafting. Not ready for development. • In Progress - Development in progress • In Review - Ready for manual testing • In Code Review - Ready for code review • Closed - Complete <p>The filters:</p> <p>Cornell Unranked Features (119 as of 10:00am 2/25) - https://issues.folio.org/issues/?filter=12033</p> <ul style="list-style-type: none"> • Please review these for your areas. Edit right in Jira, if you have permissions and are comfortable doing do. If not, please send me lists with the UXPROD number and a ranking. <p>Cornell - Go-Live: https://issues.folio.org/issues/?filter=11802</p> <ul style="list-style-type: none"> • This is still essentially the list we pared down as much as possible, then wrote up workarounds or "can't go live without" statements. <p>Cornell – 1st Quarter: https://issues.folio.org/issues/?filter=11803</p> <p>Cornell Tracking – MVP not completed: https://issues.folio.org/issues/?filter=12086 - I also created this filter to show the official MVP features along with the Cornell Rank and Fix version. A handful are listed as Q4-2020, with the rest as Q1, 2, or 3. A few in Reporting do not have Quarters assigned to them, but I believe these are the report clusters that are broader than individual reports and the Reporting SIG is managing the priorities of the reports within the clusters.</p> <p>If you need help navigating any of this, or even just want another set of eye available, I am happy to meet with anyone.</p> <p>To Dos:</p> <p>Next week – I will review the status of the items we reported to LEG, and any other Go Live features I can and report that to the team.</p> <p>End of March – All of us will rank unranked features, review the ones that are not tapped for 2020 that are most important for us at Go Live (expect by December /January) or very soon after Go Live (Expect by actual go live date?), and identify and prioritize any that we should push to have included in 2020. We have several avenues for getting things done in 2020 even if they are not currently slated for it, in my assumed order of preference: push to get them into one of the quarters (not all of the capacity for quarters is assigned), push EBSCO to make it happen, find a workaround to carry us through any gap, develop them ourselves.</p>	
	Any other old business?		
	New Business	Peter	<p>We have 32 agreements put into FOLIO ERM! Wow! Yay!</p> <ul style="list-style-type: none"> • Doing an edit-a-thon this afternoon to increase the number of agreements in the system
		Debra	<p>FOLIO FY21 budget</p> <ul style="list-style-type: none"> • No changes
	Any new business?		

2020-03-09

Attendees

Debra, Sharon, Ann, Andy, Huda, Phil, Frances, Jason,

Regrets: Nick, Laura, Darcy, Jenn, Jesse, Peter,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements	Debra	<ul style="list-style-type: none"> Zoho Projects <ul style="list-style-type: none"> Deadline was end of February 2020 Status? 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> March FOLIO Friday <ul style="list-style-type: none"> Jesse will lead it; Phil will co-support Save-the-date has gone out Posters are done! EBSCO Hosting Index Data OCLC project 	
	Old Business			
	Any other old business?			
	New Business			
	Any new business?			

2020-03-23

Attendees

Debra, Laura, Sharon, Ann, Jenn, Andy, Jesse, Huda, Phil, Peter, Frances, Jason,

Regrets: Nick, Darcy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • April FOLIO Friday - rescheduled March agenda • May FOLIO Friday - Reporting • Index Data OCLC project update • ERM update <ul style="list-style-type: none"> • Emma took home a pile of licenses to input • April 1st, Peter will be participating in the FOLIO Forum for Implementers - tune in! • Anya from EBSCO team will join our March 30th meeting • CIT PMO • Jesse - Product Council updates <ul style="list-style-type: none"> • COVID-19 impact on development - developers seem to have minimal impact at the moment; concern over SMEs • https://wiki.folio.org/pages/viewpage.action?pageId=36572924 • Fameflower is on track for April release 	
	Old Business			
		Jesse	<p>Review Status</p> <ul style="list-style-type: none"> • Status – for the UXPROD items we are addressing, status should mean: <ul style="list-style-type: none"> • Open - Ready for development • Draft - Product owner still drafting. Not ready for development. • In Progress - Development in progress • In Review - Ready for manual testing • In Code Review - Ready for code review • Closed - Complete <p>The filters:</p> <p>Cornell Unranked Features (119 as of 10:00am 2/25) - https://issues.folio.org/issues/?filter=12033</p> <ul style="list-style-type: none"> • Please review these for your areas. Edit right in Jira, if you have permissions and are comfortable doing so. If not, please send me lists with the UXPROD number and a ranking. <p>Cornell - Go-Live: https://issues.folio.org/issues/?filter=11802</p> <ul style="list-style-type: none"> • This is still essentially the list we pared down as much as possible, then wrote up workarounds or "can't go live without" statements. <p>Cornell – 1st Quarter: https://issues.folio.org/issues/?filter=11803</p> <p>Cornell Tracking – MVP not completed: https://issues.folio.org/issues/?filter=12086 - I also created this filter to show the official MVP features along with the Cornell Rank and Fix version. A handful are listed as Q4-2020, with the rest as Q1, 2, or 3. A few in Reporting do not have Quarters assigned to them, but I believe these are the report clusters that are broader than individual reports and the Reporting SIG is managing the priorities of the reports within the clusters.</p>	Tabled until April 6
		Debra	Review Zoho Project Plan -	Table until April 6
	Any other old businesses?			

New Business	Debra /Jenn	<p>1. I (Jenn) have a lot of questions about how the data shipping will work and how the LDP schemas will be kept up to date during upgrades, especially since we know (I think) that EBSCO will not support the LDP. I'm also wondering about the performance of data shipping and how taxing it will be when we are also doing other overnight processes. These may fall into more "reporting features" but LTS will need to be kept in the loop on these aspects as well.</p> <ul style="list-style-type: none"> • LDP plan is to try to ensure that LDP keeps up with schema changes • ERM is a bit of an outlier • Most of the data is in the shared LDP environment • MARC being developed for Q2 2020 (UXProd1863) • Would like to talk to EBSCO about data migration to the LDP (Sharon) • Phil - could EBSCO host LDP? • Jenn and Sharon to work on data shipping 	
Any new business?		<p>Topics for EBSCO meeting on March 30:</p> <ul style="list-style-type: none"> • ERM migration - what does it look like? What are our expectations? What are EBSCO's? 	
		How are we doing transitioning to working from home?	

2020-03-30

Attendees

Debra, Laura, Sharon, Ann, Jenn, Andy, Jesse, Huda, Phil, Peter, Frances, Jason, Darcy,

EBSCO: Anya Arnold, Theodor Tolstoy, Jose Alexander, Patty Wanninger, Nancy Grimaldi

Regrets: Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping		INTRODUCTIONS	
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • April FOLIO Friday - rescheduled March agenda • May FOLIO Friday - Reporting 	Tabled until next week
	Old Business	Debra	What to do about "Get Acquainted" sessions?	Debra will send email
	Any other old business?			
	New Business	Anya	EBSCO team https://cornell.app.box.com/file/641977761547 Next steps?	
	Any new business?	All	<ul style="list-style-type: none"> • ERM migration - what does it look like? What are our expectations? What are EBSCO's? 	

2020-04-06

Attendees

Debra, Laura, Sharon, Ann, Jenn, Jesse, Huda, Phil, Peter, Frances, Jason, Darcy,

Regrets: Nick, Andy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none">• April FOLIO Friday - rescheduled March agenda• May FOLIO Friday - Reporting• Index Data OCLC project update• ERM update<ul style="list-style-type: none">• Emma continues to add files• EBSCO team will work with ERM team directly on migration• Fameflower release• Status of your Zoho Project Plans?• Get Acquainted sessions<ul style="list-style-type: none">• Reschedule to June	
	Old Business			
		Debra	EBSCO Hosting and Migration Services follow-up <ul style="list-style-type: none">• Anya biweekly invited to this meeting• URLs:<ul style="list-style-type: none">• prod - cornell.folio.ebsco.com• test - cornell-testing.folio.ebsco.com• training - cornell-training.folio.ebsco.com• "Honey" icons selected for browser tabs• PM tool (Wrike - Zoho)	

	Jesse	<p>link for Review Status topic: https://cornell.app.box.com/file/648948408698</p> <p>DUE APRIL 10TH</p> <p>Review Status</p> <ul style="list-style-type: none"> • Status – for the UXPROD items we are addressing, status should mean: <ul style="list-style-type: none"> • Open - Ready for development • Draft - Product owner still drafting. Not ready for development. • In Progress - Development in progress • In Review - Ready for manual testing • In Code Review - Ready for code review • Closed - Complete <p>The filters:</p> <p>Cornell Unranked Features (119 as of 10:00am 2/25) - https://issues.folio.org/issues/?filter=12033</p> <ul style="list-style-type: none"> • Please review these for your areas. Edit right in Jira, if you have permissions and are comfortable doing do. If not, please send me lists with the UXPROD number and a ranking. <p>Cornell - Go-Live: https://issues.folio.org/issues/?filter=11802</p> <ul style="list-style-type: none"> • This is still essentially the list we pared down as much as possible, then wrote up workarounds or “can’t go live without” statements. <p>Cornell – 1st Quarter: https://issues.folio.org/issues/?filter=11803</p> <p>Cornell Tracking – MVP not completed: https://issues.folio.org/issues/?filter=12086 - I also created this filter to show the official MVP features along with the Cornell Rank and Fix version. A handful are listed as Q4-2020, with the rest as Q1, 2, or 3. A few in Reporting do not have Quarters assigned to them, but I believe these are the report clusters that are broader than individual reports and the Reporting SIG is managing the priorities of the reports within the clusters.</p>	
	Any other old business?		
	New Business		
	Any new business?		

2020-04-20

Attendees

Debra, Laura, Sharon, Ann, Jenn, Andy, Jesse, Huda, Phil, Peter, Jason, Darcy,

Regrets: Nick, Frances

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> April FOLIO Friday - rescheduled March agenda <ul style="list-style-type: none"> https://vod.video.cornell.edu/media/FOLIO+Friday/1_d6qd406l May FOLIO Friday - Reporting June FOLIO Friday - EBSCO Hosting Index Data OCLC project update <ul style="list-style-type: none"> Work would be completed by Fall Simeon getting authorization to proceed Jason will unofficially check with others to make sure they're good to move forward ERM update Fameflower release PM Tool: we will use Wrike - Anya is importing our data this week 	
	Old Business			
		Debra	<p>EBSCO Hosting and Migration Services</p> <p>From Anya:</p> <p>Here is my update:</p> <ul style="list-style-type: none"> I am still working on the project plan in wrike – expected to be done by Wednesday The request for the tenants was placed on Monday, April 13th – which is the beginning of the hosting teams sprint. Expected to be live on May 8th I am going to create a Jira dashboard with your already ranked items – by Wednesday <p>Questions:</p> <ul style="list-style-type: none"> How do we want to keep track of decisions? What FOLIO process decisions have already been made? <ul style="list-style-type: none"> Agenda item: what is EBSCO's process for reporting issues that we find? JIRA Bug Fix process What areas on Cornell's confluence pages -should we pay the most attention to ? <p>Integrations</p> <p>https://cornell.app.box.com/file/653060764057</p>	
		Jesse	<p>Go-live requirements update?</p> <p>For Go Live requirements: https://cornell.app.box.com/file/648948408698</p>	
	Any other old business?			
	New Business			
	Any new business?			

2020-04-27

Attendees

Debra, Laura, Sharon, Ann, Jenn, Jesse, Huda, Phil, Peter, Jason, Darcy, Nick, Frances

EBSCO: Anya, Nancy, Theodor

Regrets: Andy

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • May FOLIO Friday - Reporting • June FOLIO Friday - EBSCO Hosting • Index Data OCLC project update <ul style="list-style-type: none"> • Approved to proceed • Jason requested Invoice • Jason requested direct language to include sharing the code back to the community • ERM update <ul style="list-style-type: none"> • EBSCO hosted webinar in two weeks • Anya: please send meeting invite • Phil: FOLIO Support SIG update <ul style="list-style-type: none"> • Kickoff meeting today • Govern FOLIO support structure • Goals <ul style="list-style-type: none"> • Establish software support process • Address user support options • Monitor JIRA support ticket • Scope: only Production apps beginning with Fameflower • Focus on libraries that are in production or moving to prod soon • It's possible that Reporting is not covered by this SIG <ul style="list-style-type: none"> • Sharon: Reporting has it's own support SIG 	Darcy: what is our process for support if this is Prod only?
	Old Business			
		Debra	<p>EBSCO Hosting and Migration Services</p> <ul style="list-style-type: none"> • Anya - project plan in Wrike? • Anya - Jira dashboard with ranked items <p>Questions:</p> <ul style="list-style-type: none"> • How do we want to keep track of decisions? <ul style="list-style-type: none"> • Most of the Cornell sub groups are documenting decision in Box • What FOLIO process decisions have already been made? <ul style="list-style-type: none"> • Agenda item: what is EBSCO's process for reporting issues that we find? <ul style="list-style-type: none"> • Questions regarding instances - send them in Cornell Implementation Slack • Functionality questions - test within snapshot and/or Bug Fest • JIRA Bug Fix process <p>Integrations</p> <p>https://cornell.app.box.com/file/653060764057</p>	
		Anya	<p>JIRA Issue Log:</p> <p>https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100</p>	

		Jesse	Go-live requirements update? For Go Live requirements: https://cornell.app.box.com/file/648948408698	
	Any other old business?			
	New Business			
	Any new business?			

2020-05-11

Attendees

Debra, Laura, Sharon, Ann, Jenn, Jesse, Huda, Phil, Peter, Darcy, Frances,

EBSCO: Anya, Nancy, Patty, Theodor

Regrets: Jason, Andy, Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • May FOLIO Friday - Reporting • June FOLIO Friday - EBSCO Hosting • Index Data OCLC project update • ERM update <ul style="list-style-type: none"> • Over 100 agreements in the database now! • Liisa cleaning up old entries 	
	Old Business			
		Debra	<p>EBSCO Hosting and Migration Services</p> <ul style="list-style-type: none"> • Anya - project plan in Wrike? <ul style="list-style-type: none"> • Scheduled with Andy for May 14th • Laura/Jason and then Phil will go next • Anya - Hosting Updates <ul style="list-style-type: none"> • Prod Eidelweiss instance is up • Need to set up a meeting with Jenn, Phil, Peter, Alex to plan data migration • Following data migration, upgrade to Fameflower • Testing and Training environments should be done on Friday, May 15th in Fameflower 	
		Jesse	<p>Go-live requirements update?</p> <p>For Go Live requirements: https://cornell.app.box.com/file/648948408698</p> <ul style="list-style-type: none"> • Combine with Holly's requested review 	
	Any other old business?			

New Business	Debra	<p>URGENT: Holly needs a list of what we absolutely need for Go Live beyond the MVP by June 1st</p> <ul style="list-style-type: none"> • Process? <ul style="list-style-type: none"> • Team to categorize and confirm in JIRA what Cornell must have for Go-Live • This should include looking at "1 Quarter After" and see if any of those should be Go-Live • ALL Unranked items in JIRA need to be ranked • Make notes about "show stoppers" • Deadline: May 25th • Jesse or Debra or Holly (we'll figure it out) who will re-pull from JIRA to get data in Holly's spreadsheet • Anya can also rank on our behalf if folks are comfortable or don't have permission to update Jira <p>https://docs.google.com/spreadsheets/d/1VgyCrNBXIGL12ynMNd35o1CyE9ONP1aj4HitqsZb8/edit#gid=253467756</p> <p>I have created the Round IV feature spreadsheet I promised at today's meeting. It is located at https://docs.google.com/spreadsheets/d/1imwPvcduJZaoZ0wFFTbpxkC_S2_ph7bDCN5kGQ-FPg/edit?usp=sharing</p> <p>There are 4 tabs. The features you will want to discuss right away are in the tab titled "Process this worksheet." The features that need more ranks are in the tab titled "Need more rankers." The features that are ranked very low and don't need to be reviewed (unless you want to) are in the tab titled "Not needed at go-live." The "NFR or mandatory features" tab contains the features that are labeled as NFR and/or mandatory. Please let me know if you have any questions.</p>	
	Phil	<p>Integrations Updates (CIT collab)</p> <ul style="list-style-type: none"> • Meeting with CIT Integration Team on May 14th to kick off Patron Feed integration 	
Any new business?			

2020-05-18

Attendees

Debra, Laura, Sharon, Ann, Jenn, Jesse, Huda, Phil, Peter, Jason, Darcy, Nick, Frances, Andy

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • May FOLIO Friday - Debrief <ul style="list-style-type: none"> • 65 people were on Zoom • Questions were extensive! Real interest and engagement • June FOLIO Friday - EBSCO Hosting • July - No FOLIO Friday • Index Data OCLC project update • ERM update 	
	Old Business			
		All	Cornell FOLIO Problem Reporting Process <ul style="list-style-type: none"> • Triage Code, Functionality, or Hosting Issue • How? • What tool? https://cornell.app.box.com/file/661368266009	Move out 2 weeks.
		Debra	Get Acquainted Sessions: <ul style="list-style-type: none"> • Schedule <ul style="list-style-type: none"> • Thurs 6/4 10-11:30am (cancel) • Wed 6/9 3-4:30pm • Fri 6/12 2-3:30pm • Thurs 6/18 10-11:30am • Mon 6/22 3-4:30pm • Fri 6/26 1-2:30pm • Communication • Laura will reach out to 5 Colleges to see if they have anything they can share • 2 for LTS (acquisitions, cataloging); 1 for Access Services; 2 open to CUL 	Add to the agenda for next week to discuss with EBSCO

	Jesse / Debra	<p>Go-live requirements update?</p> <p>For Go Live requirements: https://cornell.app.box.com/file/648948408698</p> <p>Previous 2019 Analysis: https://cornell.app.box.com/file/666466440924</p> <p>These are these are 9 that we couldn't identify real workarounds for previously. Some are still unclear about importance or status in the project, but are not specifically closed or resolved. Others are either resolved or no longer Must Haves.</p> <table border="1"> <thead> <tr> <th>Epic</th> <th>Summary</th> <th>JIRA Issue</th> <th>Current status with Jesse's notes</th> </tr> </thead> <tbody> <tr> <td>Library Data Platform (LDP) Beta</td> <td>Implement report query capability on data from MARC fields</td> <td>UXPROD-1863</td> <td>Status unclear – Sharon should know</td> </tr> <tr> <td>Library Data Platform (LDP) Feature Requests</td> <td>Build reports based on custom lists</td> <td>UXPROD-1867</td> <td>Priority unclear – Sharon should know</td> </tr> <tr> <td>Library Data Platform (LDP) Feature Requests</td> <td>Exclude records that are suppressed in the catalog from reports</td> <td>UXPROD-1872</td> <td>Not completed, but this seems like it is an aspect of how reports get written, rather than a functional requirement. Notes on the ticket back this assumption up.</td> </tr> <tr> <td>Record export for inventory instance & holdings & items, MARCcat Bib, MARC Holdings, & Authority</td> <td>Export of MARC Bib records from MARCcat</td> <td>UXPROD-1911</td> <td>Part of the Index Data work – issue is currently marked as "won't do" due to MARCcat delays.</td> </tr> <tr> <td>Fees/Fines</td> <td>Create extract file for transferred fees/fines</td> <td>UXPROD-394</td> <td>Tapped for Q1 2021 – I assume this could be covered with a report, if formatted properly for bursar, etc...</td> </tr> <tr> <td>Reporting: Build Misc Functionality to Support Reporting</td> <td>Identify data elements needed for reporting</td> <td>UXPROD-863</td> <td>DONE – Q4 2109</td> </tr> <tr> <td>Order Materials and Services</td> <td>Duplicate orders report</td> <td>UXPROD-888</td> <td>Tapped for Q4 2020</td> </tr> <tr> <td>MARCcat</td> <td>Import individual MARC record</td> <td>UXPROD-976</td> <td>We are OK without MARCcat for a while – the OCLC integration Index Data is working on and lightweight MARC editor EBSCO is working on will cover us.</td> </tr> <tr> <td>Reporting: LDP Reports</td> <td>Build Data Warehouse Reports</td> <td>UXPROD-1244</td> <td>DONE...ish – divided into component parts, ranked separately.</td> </tr> </tbody> </table>	Epic	Summary	JIRA Issue	Current status with Jesse's notes	Library Data Platform (LDP) Beta	Implement report query capability on data from MARC fields	UXPROD-1863	Status unclear – Sharon should know	Library Data Platform (LDP) Feature Requests	Build reports based on custom lists	UXPROD-1867	Priority unclear – Sharon should know	Library Data Platform (LDP) Feature Requests	Exclude records that are suppressed in the catalog from reports	UXPROD-1872	Not completed, but this seems like it is an aspect of how reports get written, rather than a functional requirement. Notes on the ticket back this assumption up.	Record export for inventory instance & holdings & items, MARCcat Bib, MARC Holdings, & Authority	Export of MARC Bib records from MARCcat	UXPROD-1911	Part of the Index Data work – issue is currently marked as "won't do" due to MARCcat delays.	Fees/Fines	Create extract file for transferred fees/fines	UXPROD-394	Tapped for Q1 2021 – I assume this could be covered with a report, if formatted properly for bursar, etc...	Reporting: Build Misc Functionality to Support Reporting	Identify data elements needed for reporting	UXPROD-863	DONE – Q4 2109	Order Materials and Services	Duplicate orders report	UXPROD-888	Tapped for Q4 2020	MARCcat	Import individual MARC record	UXPROD-976	We are OK without MARCcat for a while – the OCLC integration Index Data is working on and lightweight MARC editor EBSCO is working on will cover us.	Reporting: LDP Reports	Build Data Warehouse Reports	UXPROD-1244	DONE...ish – divided into component parts, ranked separately.	Add to the agenda for next week to discuss with EBSCO
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Any new business?																																											

2020-06-01

Attendees

Debra, Laura, Sharon, Ann, Jenn, Jesse, Huda, Phil, Peter, Jason, Darcy, Nick, Frances, Andy

EBSCO: Anya, Patty, Nancy, Theodor, Alex

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • June FOLIO Friday - EBSCO Hosting - June 19th • July - No FOLIO Friday 	
	Old Business			
		Anya	EBSCO Hosting Updates? <ul style="list-style-type: none"> • All three tenants up (Phil has access) • Will take a copy of Cornell's Prod and import into EBSCO Prod (will be completed 6/5/2020) <ul style="list-style-type: none"> • Jesse, Jenn, and Peter will test (loop Jason in if necessary) Who needs to be scheduled for Wrike? <ul style="list-style-type: none"> • Jesse, Ann • Darcy, Huda, Nick Needs access to Wrike: <ul style="list-style-type: none"> • Jesse jtk1@cornell.edu • Ann ama8@cornell.edu • Sharon slm5@cornell.edu • Nick nick.cappadona@cornell.edu • Darcy dad284@cornell.edu • Huda hjk54@cornell.edu • Laura lew235@cornell.edu • Simeon simeon.warner@cornell.edu • Frances frances.webb@cornell.edu 	
		Debra	Proposed: <ul style="list-style-type: none"> • Postpone until October • Anya will invite CUL folks to the Explore sessions • Anya/EBSCO will demo Bug Fest for FOLIO Friday in June and invite CUL folks to participate • October sessions will allow us to use Cornell data and Cornell instances rather than the EBSCO "dummy" system Get Acquainted Sessions: <ul style="list-style-type: none"> • Schedule <ul style="list-style-type: none"> • Wed 6/9 3-4:30pm • Fri 6/12 2-3:30pm • Thurs 6/18 10-11:30am • Mon 6/22 3-4:30pm • Fri 6/26 1-2:30pm • Communication • 2 for LTS (acquisitions, cataloging); 1 for Access Services; 2 open to CUL 	Decision: Postpone to Mid-September /October In the meantime, each unit conduct small group sessions

	Jesse / Debra	<p>Go-live requirements update SHOWSTOPPERS discussion:</p> <p>https://docs.google.com/spreadsheets/d/1QJUZeLw5xpocn0Pc_1WbHSMR9BXhFllsrb-fGoD4uY/edit#gid=0</p> <p>For Go Live requirements: https://cornell.app.box.com/file/648948408698</p> <p>Previous 2019 Analysis: https://cornell.app.box.com/file/666466440924</p>	
	Any other old business?		
New Business	Debra	<p>Scheduling EBSCO FOLIO Analytics demo</p> <ul style="list-style-type: none"> • U of A going live with LDP and EBSCO FOLIO Analytics • Missouri going live Stats dashboard that Chalmers is using until EBSCO FOLIO Analytics is ready 	
	Debra	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100</p>	
	Any new business?		

2020-06-08

Attendees

Debra, Laura, Jenn, Jesse, Huda, Phil, Peter, Darcy, Nick, Frances, Sharon, Ann,

Regrets: Andy, Jason,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • June FOLIO Friday - EBSCO Hosting • July - No FOLIO Friday • Index Data OCLC project update? 	
	Old Business			
		All	Cornell FOLIO Problem Reporting Process <ul style="list-style-type: none"> • Triage Code, Functionality, or Hosting Issue • How? • What tool? https://cornell.app.box.com/file/661368266009	
		All	Thoughts on EBSCO FOLIO Analytics demo? <ul style="list-style-type: none"> • Slides and recording can be found: https://cornell.app.box.com/folder/115128586628 • Jenn: "intellectual effort funneled from folio groups to ebSCO proprietary projects that compete with folio is definitely concerning, certainly introduces even more doubt in my mind about data privacy" <ul style="list-style-type: none"> • any company could develop anything that connect to FOLIO that can look or meet the needs that come out of meeting and sigs (https://wiki.folio.org/display/RPT/Reporting+SIG+Home) • Folio "IP" is owned by Folio and open to all. But the only thing we're talking about here is requirements • Data privacy is fully baked into E.Analytics the customers own their data • Sub-group to do analysis/assessment of LDP and EFA options <ul style="list-style-type: none"> • Debra, Sharon, Adam C., Vandana, Joanne 	
		Jesse / Debra	Go-live requirements update SHOWSTOPPERS discussion: Holly: https://docs.google.com/spreadsheets/d/1iewRDN6eLuqSdHUT_swGWeqnlXa8Pkp7t69K_0ALr4/edit#gid=2118517699 CUL: https://docs.google.com/spreadsheets/d/1QJUZeLw5xpocn0Pc_1WbHSMR9BXhFllsirb-fGoD4uY/edit#gid=0 For Go Live requirements: https://cornell.app.box.com/file/648948408698 Previous 2019 Analysis: https://cornell.app.box.com/file/666466440924	
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100	
	Any other old business?			
	New Business	Debra	From Holly: PO MVP Feature Status https://docs.google.com/spreadsheets/d/1VgyCrNBXAXIGL12ynMNd35o1CyE9ONP1aj4HitqsZb8/edit#gid=253467756	
	Any new business?			

2020-06-15

Attendees

Debra, Laura, Jenn, Jesse, Huda, Phil, Peter, Darcy, Nick, Frances, Sharon, Ann, Andy,

EBSCO: Anya, Patty, Theodor

Regrets: Jason,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none">• June FOLIO Friday - EBSCO Hosting - any questions?<ul style="list-style-type: none">• Explore Sessions• Bug Fest• Dashboard• Demos• AWS Hosting and current tenant statuses• July - No FOLIO Friday• Index Data OCLC project update?	
	Old Business			

	<p>Anya</p>	<p>Updates/agenda items</p> <ul style="list-style-type: none"> • Anya updates <ul style="list-style-type: none"> • Alex has been working on ERM migration <ul style="list-style-type: none"> • Issue connecting agreements to e-holdings records • Test - reference and settings data copied over from CUL's test environment <ul style="list-style-type: none"> • Jenn prepping full file • Also need Locations - Jenn says it's done! • Email from Harry • Bug Fest (Debra, Jenn, Jean P also on Zoom) <div data-bbox="412 365 1289 863" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center; background-color: #4a5568; color: white; padding: 5px;">Test Environment: https://bugfest.folio.ebsco.com/</p> <ul style="list-style-type: none"> • This system receives version updates right before Bug Fest week • Technical staff may take the system down any time in order to fix a blocking problem. • Proper warning will be given during Bug Fest in case of an outage. <ul style="list-style-type: none"> • Credentials: folio/folio. Please use this login to create a user with desired permissions that you will use for testing. • Don't use "folio" user to run test cases. • Use deliverable email address when creating your user account • FOLIO supports only Chrome as internet browser. <p style="font-size: small; display: flex; justify-content: space-between;">4 www.folio.org folio*</p> </div> <div data-bbox="412 863 1289 1381" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center; background-color: #4a5568; color: white; padding: 5px;">Claiming Test Cases in <u>Test Rail</u></p> <ol style="list-style-type: none"> 1. No login for past 6 month → Account may be disabled. Contact @anton_e 2. Test claiming window opens one week before Bug Fest event - June 16th through 19th 3. Only claim what can be realistically completed. We're always trying to finalize work assignments before Bug Fest starts and minimize number of unassigned defects. 4. Keep community informed if you are falling behind on your commitment: <ol style="list-style-type: none"> a. Please try to give warning as early as possible. b. Don't leave claimed but uncompleted test cases behind. c. Seek help by posting in #bug-fest Slack channel 5. Don't take away a test case that has been claimed by someone else. Reach out to the current assignee first before taking away a test case. 6. Test cases that have Critical and High priority should be claimed first. <p>Video: How to claim a test case</p> <p style="font-size: small; display: flex; justify-content: space-between;">6 www.folio.org folio*</p> </div> <div data-bbox="412 1381 1365 1892" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center; background-color: #4a5568; color: white; padding: 5px;">How to Join</p> <ol style="list-style-type: none"> 1. Reach out to Anton to request <u>Test Rail</u> account: <ol style="list-style-type: none"> a. Slack (@anton_e) b. email (v-aemelianov@ebsco.com) 2. Join #bug-fest channel in Slack 3. Attend Kick-off meeting or watch recorded video 4. Link to the video will be at https://wiki.folio.org/display/FTC/Bug+Fest+Q2+2020 5. Watch training videos https://wiki.folio.org/display/FTC/Helpful+Resources </div>	
	<p>All</p>	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPagelD=11100</p>	

	Jesse / Debra	<p>Go-live requirements update SHOWSTOPPERS discussion:</p> <p>Holly: https://docs.google.com/spreadsheets/d/1iewRDN6eLuqSdHUT_swGWeqnlXa8Pkpp7t69K_0ALr4/edit#gid=2118517699</p> <p>CUL: https://docs.google.com/spreadsheets/d/1QJUZeLw5xpocn0Pc_1WbHSMR9BXhFllsrb-fGoD4uY/edit#gid=0</p> <p>For Go Live requirements: https://cornell.app.box.com/file/648948408698</p> <p>Previous 2019 Analysis: https://cornell.app.box.com/file/666466440924</p>	
	Any other old business?		
	New Business		
	Any new business?		

2020-06-22

Attendees

Debra, Laura, Jenn, Jesse, Huda, Phil, Peter, Nick, Sharon, Ann, Jason,

Regrets: Andy, Darcy, Frances,

Discussion Items

Time	Item	Who	Notes	Actions
	House keeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • June FOLIO Friday - EBSCO Hosting - Moved to June 26th due to new Juneteenth Holiday • July - No FOLIO Friday • Bug Fest June 22-26 • Debra off next week. Do you want to have meeting next with EBSCO? Topics? Facilitator? • Index Data OCLC project update? <ul style="list-style-type: none"> • https://issues.folio.org/browse/UXPROD-211 • targeted for Honeysuckle release (September 2020) • ERM migration update <ul style="list-style-type: none"> • Timeline to be finalized at Thursday's meeting 6/25 	
	Old Business			
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPagelD=11100	
		Jesse / Debra	<p>Go-live requirements update SHOWSTOPPERS discussion:</p> <p>Holly: https://docs.google.com/spreadsheets/d/1iewRDN6eLuqSdHUT_swGWeqnlXa8Pkpp7t69K_0ALr4/edit#gid=2118517699</p> <p>CUL: https://docs.google.com/spreadsheets/d/1QJUZeLw5xpocn0Pc_1WbHSMR9BXhFIIsirb-fGoD4uY/edit#gid=0</p> <p>For Go Live requirements: https://cornell.app.box.com/file/648948408698</p> <p>Previous 2019 Analysis: https://cornell.app.box.com/file/666466440924</p>	
	Any other old business?			
	New Business	Debra	<p>In folio- in the user app - there is a setting on if pictures are included in the user record. some libraries like this for staff but not for patron - some like it for no one due to name and pictures might not match - so there is decision at an admin level on what is cornell's policy on visual recognition of the user.</p> <ul style="list-style-type: none"> • Do not have it in Voyager • Admin Decision: No 	

	Any new business?	Laura	I have some concerns about some of the EBSCO engagement with FOLIO outlined in their recent letter. These concerns are shared by some other members of the FOLIO community I've spoken to, some of whose institutions are also contracting with EBSCO for hosting. I'm wondering if we can get some clarification about the task manager app they mention? Specifically, I'd like to know if it will be made available (not necessarily free, but available) to the entire community? I don't know if we have time to talk about this at today's meeting—but could we (CUL implementation) talk about this in the near future and then, if others agree, bring it up in one of the meetings with EBSCO?	Following up with Anya

2020-06-29

Attendees

Jenn, Jesse, Phil, Peter, Nick, Sharon, Jason, Andy, Darcy, Frances, Laura

EBSCO: Anya, Patty

Regrets: Debra, Huda, Ann

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • June FOLIO Friday - EBSCO Hosting - debrief <ul style="list-style-type: none"> • Went well. Send any feedback to Anya. • July - No FOLIO Friday • Bug Fest June 22-26 - Debrief <ul style="list-style-type: none"> • BugFest underway • A few new staff involved some jumped right in, some had technical issues.challenges for "first-timers". Problems with permission sets, some of the data, • Suggestion: Request feedback from community, de-brief questions. • Index Data OCLC project update? - Nothing new - MM SIG discussing in a coupe of weeks. <ul style="list-style-type: none"> • https://issues.folio.org/browse/UJXPROD-211 • targeted for Honeysuckle release (September 2020) • ERM migration update - <ul style="list-style-type: none"> • Migrated: Licenses, Organizations, Interfaces and Contacts, Reference Data, Users <ul style="list-style-type: none"> • Permissions still underway • Today: Agreements and linking Agreements to Licenses • Tomorrow: Linking these to eHoldings. • Call set for Wednesday AM to confirm. • Data migrations - Instances and holdings loaded. Items coming by Wed. <ul style="list-style-type: none"> • Data validation - Theo provided a report of what went well, what didn't, know problems. LTS will review and will examine the data. • Data migration report (300 pages!): https://cornell.app.box.com/file/68489577979 	
	Old Business			
		Anya	Updates - nothing beyond the above.	
		Jesse	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100 How important is it to rank these quickly?</p> <ul style="list-style-type: none"> • We don't want the list to get long. • Deal with low hanging fruit - obvious needs and obvious not needed. • Try to leave them no more than a month. 	
		Laura	<p>I have some concerns about some of the EBSCO engagement with FOLIO outlined in their recent letter. These concerns are shared by some other members of the FOLIO community I've spoken to, some of whose institutions are also contracting with EBSCO for hosting. I'm wondering if we can get some clarification about the task manager app they mention? Specifically, I'd like to know if it will be made available (not necessarily free, but available) to the entire community? I don't know if we have time to talk about this at today's meeting—but could we (CUL implementation) talk about this in the near future and then, if others agree, bring it up in one of the meetings with EBSCO?</p> <ul style="list-style-type: none"> ▪ CORAL Workflow Engine = task manager - automated tracking and e-mail system - 5Colleges not fond of the locked-in system with CORAL and expressed this to EBSCO. EBSCO has put together wireframes for review. Separate dev team at EBSCO linked to Kahlilah. ▪ For Cornell - how much of this could replace Mantis eNERF system? 	
	Any other old businesses?			

	New Busine ss			
			July 15 FOLIO Forum - Reporting queries related to all main staff apps.	
	Any new busines s?			

2020-07-06

Attendees

Phil, Peter, Sharon, Andy, Frances, Laura, Debra, Huda,

Regrets: Jesse, Jason, Darcy, Ann, Nick, Jenn

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • FOLIO Friday <ul style="list-style-type: none"> • July - NONE • August 14 - topic? • Bug Fest June 22-26 - Debrief <ul style="list-style-type: none"> • Suggestion: Request feedback from community, de-brief questions. <ul style="list-style-type: none"> • Cornell community? Do we know who participated? • 85% of Bug Fest identified bugs are fixed and testing well • ERM migration update <ul style="list-style-type: none"> • Complete! • Upgrade to Fameflower tentatively scheduled for July 10th • OCLC Connexion - IndexData work will be done in October rather than September • Data migrations <ul style="list-style-type: none"> • Data migration report (300 pages!): https://cornell.app.box.com/file/684895777979 • July 15 FOLIO Forum - Reporting queries related to all main staff apps. <ul style="list-style-type: none"> • Is there a link to register that I can send out? - DONE 	
	Old Business			
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100	
	Any other old business?			
	New Business	Debra	July meeting schedule <ul style="list-style-type: none"> • Hold meeting time - do what we can 	
		Debra	ILS Reference Request <ul style="list-style-type: none"> • We really can't answer most of their questions, because they assume post-migration. 	
	Any new business?			

2020-07-13

Attendees

Phil, Peter, Sharon, Laura, Debra, Huda, Jesse, Jason, Darcy, Ann, Nick, Jenn

EBSCO: Anya, Patty

Regrets: Andy, Frances,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • FOLIO Friday <ul style="list-style-type: none"> • July - NONE • August 14 <ul style="list-style-type: none"> • Possibly ERM / Selector demo???? • July 15 FOLIO Forum - Reporting queries related to all main staff apps. 	
	Old Business	Anya	EBSCO Updates <ul style="list-style-type: none"> • ERM upgrade to Fameflower has been requested <ul style="list-style-type: none"> • Alex has squashed any of the bugs that have come up • New employee on the EBSCO Implementation Team: Molly Driscoll in New Hampshire • Wrike updates for data migration - move to late August • Need meeting regarding acquisitions data in July scheduled - w/ Jenn, Jesse, Anya, and Alex 	
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100	
		Debra	Status of sub-group to do analysis/assessment of LDP and EFA options <ul style="list-style-type: none"> • Debra, Sharon, Adam C., Vandana, Joanne, Laura 	
		Debra	Cornell FOLIO Support and Problem Reporting Process https://cornell.app.box.com/file/661368266009 Sub-group? Volunteers? <ul style="list-style-type: none"> • Phil, Sharon 	
	Any other old business?			
	New Business	Debra	Bug Fest feedback: Bug Fest	
	Any new business?			

2020-07-20

Attendees

Phil, Peter, Sharon, Laura, Debra, Jesse, Darcy, Jenn, Frances, Jean

Regrets: Andy, Jason, Nick, Ann, Huda (conference)

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		Welcome Jean! Goldenrod release is a go	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • FOLIO Friday <ul style="list-style-type: none"> • July - NONE • August 14 <ul style="list-style-type: none"> • Possibly ERM / Selector demo???? • General updates from each section; including upcoming milestones? • Reporting sub-group update • Support sub-group update • ERM upgrade update? 	
	Old Business	All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100	
		Phil	Implementation Team's access to FOLIO Test	
	Any other old business?			
	New Business	All	For FOLIO: Do we want more than just "General" Notes set up? (specific kinds of Notes or Users, Inventory, etc) <ul style="list-style-type: none"> • eventually yes • "Notes" is confusing nomenclature 	
		Debra	Governance sub-group volunteers <ul style="list-style-type: none"> • Phil, Darcy, Jenn, Jason (or Jesse), Andy(or designate) 	
		Jenn	Access to log files in hosted FOLIO <ul style="list-style-type: none"> • Extremely problematic for developers doing troubleshooting • Especially impactful on data migration, as well • IndexData is going to ELK (Elastic Search + LogStash + Kibana) for logging to get people access • Kate from EBSCO says they may be considering it ELK 	
	Any new business?			

2020-07-27

Attendees

Phil, Sharon, Laura, Debra, Huda, Jesse, Jason, Darcy, Ann, Nick, Jenn, Andy, Frances,

EBSCO: Anya, Molly

Regrets: Peter

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		Welcome Molly!	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - August 14 <ul style="list-style-type: none"> Section Updates / Timeline & Milestones overview Reporting sub-group update Sub-group for Governance meeting scheduled for September 21st 	
	Old Business	All	Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100	
		Anya	<ul style="list-style-type: none"> EBSCO Updates <ul style="list-style-type: none"> Anya will be on vacation first week of September Met with Andy's team - will meet weekly with them (or as necessary) ERM upgrade update <ul style="list-style-type: none"> LTS (Jesse) will let Anya know by close of business on July 29th a good date for upgrade Allow 4 hours of downtime for upgrade Report selection review Goldenrod upgrade path <ul style="list-style-type: none"> We will be upgraded at the end of September 	
		Debra	<p>If further discussion is needed: Access to log files in hosted FOLIO</p> <ul style="list-style-type: none"> Extremely problematic for developers doing troubleshooting Especially impactful on data migration, as well IndexData is going to ELK (Elastic Search + LogStash + Kibana) for logging to get people access Kate from EBSCO says they may be considering it ELK Darcy - different needs for system logs vs FOLIO logs Call to discuss with EBSCO, Phil, Nick, Jenn <ul style="list-style-type: none"> Phil will coordinate Cornell-side <p>From Joe M: Thanks to Alex there is less need for me to see the logs. He showed me an app that he uses called 'POSTMAN' that returns json parsing info/errors that would be tough to match using logs.</p>	
	Any other old business?			

<p>New Business</p>	<p>Debra</p>	<p>Q3 Cap Plan: https://issues.folio.org/secure/Dashboard.jspa?selectPageld=11202</p> <p>2020 Planned features: https://issues.folio.org/secure/Dashboard.jspa?selectPageld=11003</p> <h2 style="text-align: center;">Planning steps</h2> <ol style="list-style-type: none"> 1. Reduced developer capacity for feature development to 50% <ul style="list-style-type: none"> • 40% allocated for bug fixing • 10% for performance tests and improvements 2. Worked with POs to generate plans for Q3 and Q4 with Rounds focus 3. Cleared Q1 2021 fix versions from features - plans this far in the future are too squishy to be valuable <p>Data comes from: https://docs.google.com/spreadsheets/d/12wNBLIMoexSN-upjRLa7SXYCiKTiN80GLB4sf9ooYjc/edit</p> <p>PO MVP and Rounds Feature Status (the "what's changed" spreadsheet): https://docs.google.com/spreadsheets/d/1VgyCrNBAXIGL12ynMNd35o1CyE9ONP1aj4HitqsZb8/edit#gid=1301720165</p>	
<p>Any new business?</p>		<p>review rankings for features associated with https://issues.folio.org/browse/UXPROD-1321 (item state) – stories are being updated now based on input from item status working group</p> <ul style="list-style-type: none"> • towards the end of the week of July 31st, take a look and make sure our rankings are correct 	

2020-08-03

Attendees

Phil, Sharon, Laura, Debra, Huda, Jesse, Jason, Darcy, Ann, Nick, Jenn, Frances, Peter, Jean

Regrets: Andy

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		Confluence cannot be edited August 21-26. Do we want to meet on the 24th?	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - August 14 <ul style="list-style-type: none"> Section Updates / Timeline & Milestones overview <ul style="list-style-type: none"> Debra - overall project timeline Jesse - Development side Sharon - reporting Robbie - systems Laura - Inventory and related apps Jenn - Import / data export Darcy - Access Services Ann - Resource Management Reporting sub-group update <ul style="list-style-type: none"> Linda Miller was added to the sub-committee ERM timeline <ul style="list-style-type: none"> Upgrade to Fameflower complete 	
	Old Business	All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100	
		Laura / All	<p>review rankings for features associated with https://issues.folio.org/browse/UXPROD-1321 (item state) – stories are being updated now based on input from item status working group</p> <ul style="list-style-type: none"> take a look and make sure our rankings are correct 	ACTION ITEM: Jesse, Laura, Jean, and Andy get together and review (Laura will schedule)
	Any other old business?			
	New Business	Laura	<p>I'm sending this to the group rather than just adding it to the agenda to give us all time to think about it in advance. As Jenn, Jason, Pam, and I have been looking at the unmapped MARC fields in our bibliographic data from the recent test migration EBSCO did, I've been wondering if we need to map the subject fields (aka 6XX fields) at all? These fields will still be in our MARC data and therefore surfaced in discovery and available for reporting.</p> <p>So the question is do staff want to either look at or search by subject? And a corollary question is, are there other fields in the Instance, Holdings, or Item data we are assuming are useful/necessary that might not be?</p> <ul style="list-style-type: none"> Do Subjects need to be displayed in Inventory? <ul style="list-style-type: none"> Discuss this when Access Services is present Notes display (5XX fields) <ul style="list-style-type: none"> Who else has a stake in this? Acquisitions? Circ? <p>From Huda Khan to Everyone: 01:32 PM Is there a data flow diagram (MARC to Inventory, Inventory to X, etc.)? (there may already be, but it would help perhaps people like me with this discussion although I think I'm getting the gist)</p> <p>From Laura Wright (she/her) to Everyone: 01:33 PM yes -- I'll look for it this may be too convoluted -- there are simpler versions somewhere: https://docs.google.com/drawings/d/1rNxuH6H-iUbibaWxsLQhhAvAx3CE2ZbluO8m9l-bOGM/edit</p> <p>From Nick Cappadona to Everyone: 01:35 PM You may also find this diagram re: data-import useful: https://docs.google.com/drawings/d/1IN2t0T838HtYtNctdugQN0nL8_KSJ-PzysQxSyZ1Hc/edit</p>	Table until next week when Access Services is present to discuss

		All	<p>Topics for FOLIO Explore Sessions?</p> <p>Ask at FOLIO Friday also</p> <ul style="list-style-type: none"> • In App Reporting (demos) • Inventory (several sessions) <ul style="list-style-type: none"> • Views into Inventory (ex: RA view of Inventory) 	
		Debra	<p>Time to kickoff Training team. Who needs to be involved?</p> <ul style="list-style-type: none"> • Debra • Jean • Sharon • Andy? Andy designate? • Amy B • Jesse will talk to Peter and Emma about a participant 	
	Any new businesses?		<p>Agenda items for next week:</p> <ul style="list-style-type: none"> • For EBSCO: <ul style="list-style-type: none"> • How difficult is it to change mappings once data has been migrated • Does EBSCO have any training documentation that we can begin reviewing? 	


2020-08-10

Attendees

Sharon, Laura, Debra, Huda, Jesse, Darcy, Ann, Nick, Jenn, Frances, Jean

Regrets: Phil, Jason, Peter, Andy

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - August 14 <ul style="list-style-type: none"> Section Updates / Timeline & Milestones overview <ul style="list-style-type: none"> Debra - overall project timeline Jesse - Development side Sharon - reporting Robbie - systems Laura - Inventory and related apps Jenn - Import / data export Darcy - Access Services Ann - Resource Management Reporting sub-group update <ul style="list-style-type: none"> https://cornell.app.box.com/file/690694108515?sb=activity IndexData OCLC project update <ul style="list-style-type: none"> No updates On track for October 2020 Training team update: <ul style="list-style-type: none"> Debra Jean Sharon Andy? Andy designate? Amy B Jesse will talk to Peter and Emma about a participant 	
	Old Business	Anya (not invited - reinvite for next week)	<p>EBSCO</p> <ul style="list-style-type: none"> How difficult is it to change mappings once data has been migrated <ul style="list-style-type: none"> Theo reports this may be easy Does EBSCO have any training documentation that we can begin reviewing? Task Manager Discussion <div style="text-align: center;">  <p>Task Manager Discussion.docx</p> </div> <ul style="list-style-type: none"> Jesse will test - and coordinate other ERM user acceptance testing https://cornell.app.box.com/file/700758490849 	
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100	

		<p>Laura</p> <p>From Last Week:</p> <p>I'm sending this to the group rather than just adding it to the agenda to give us all time to think about it in advance. As Jenn, Jason, Pam, and I have been looking at the unmapped MARC fields in our bibliographic data from the recent test migration EBSCO did, I've been wondering if we need to map the subject fields (aka 6XX fields) at all? These fields will still be in our MARC data and therefore surfaced in discovery and available for reporting.</p> <p>So the question is do staff want to either look at or search by subject? And a corollary question is, are there other fields in the Instance, Holdings, or Item data we are assuming are useful/necessary that might not be?</p> <ul style="list-style-type: none"> • Do Subjects need to be displayed in Inventory? <ul style="list-style-type: none"> • Discuss this when Access Services is present • Notes display (5XX fields) <ul style="list-style-type: none"> • Who else has a stake in this? Acquisitions? Circ? <p>From Huda Khan to Everyone: 01:32 PM Is there a data flow diagram (MARC to Inventory, Inventory to X, etc.)? (there may already be, but it would help perhaps people like me with this discussion although I think I'm getting the gist)</p> <p>From Laura Wright (she/her) to Everyone: 01:33 PM yes -- I'll look for it this may be too convoluted -- there are simpler versions somewhere: https://docs.google.com/drawings/d/1rNxuH6H-iUbibaWXsLQhhAvAx3CE2ZbluO8m9I-bOGM/edit</p> <p>From Nick Cappadona to Everyone: 01:35 PM You may also find this diagram re: data-import useful: https://docs.google.com/drawings/d/1IN2t0T838HtHytNctdugQN0nL8_KSJ-PzysQxSyZ1Hc/edit</p>	Table - need Andy
	Any other old businesses?		
	New Businesses		
	Any new businesses?		

2020-08-17


Attendees

Sharon, Laura, Debra, Huda, Ann, Nick, Frances, Jean, Phil, Jason, Peter, Andy, Jenn,

EBSCO: Anya, Molly, Theodor, Patty, Alex

Regrets: Jesse, Darcy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> August debrief September FOLIO Friday: September 18 Reporting sub-group update <ul style="list-style-type: none"> https://cornell.app.box.com/file/690694108515?sb=/activity IndexData OCLC project update Training team update <ul style="list-style-type: none"> Anya will share Bug Fest Test Cases from Test Rails <ul style="list-style-type: none"> Missouri State used them for training We can go through them and update for Cornell's specific instances 90 minute sessions with EBSCO team included - use Zoom and screen remote control to train Week of Go-Live open Zoom sessions all day every day for people to drop in and ask questions 	
	Old Business	Anya	<p>EBSCO</p> <ul style="list-style-type: none"> Anya updates <ul style="list-style-type: none"> New "showstopper" chart in JIRA 4 days ahead of schedule for Goldenrod upgrades, so we may upgrade sooner How difficult is it to change mappings once data has been migrated <ul style="list-style-type: none"> Theo reports this doable Does EBSCO have any training documentation that we can begin reviewing? <ul style="list-style-type: none"> See above Training Team update Task Manager Discussion <div style="text-align: center;">  <p>Task Manager Discussion.docx</p> </div> <ul style="list-style-type: none"> Jesse will test - and coordinate other ERM user acceptance testing August 13-20 https://cornell.app.box.com/file/700758490849 	
	All		Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageld=11100	

	Laura	<p>From Last Week:</p> <p>I'm sending this to the group rather than just adding it to the agenda to give us all time to think about it in advance. As Jenn, Jason, Pam, and I have been looking at the unmapped MARC fields in our bibliographic data from the recent test migration EBSCO did, I've been wondering if we need to map the subject fields (aka 6XX fields) at all? These fields will still be in our MARC data and therefore surfaced in discovery and available for reporting.</p> <p>So the question is do staff want to either look at or search by subject? And a corollary question is, are there other fields in the Instance, Holdings, or Item data we are assuming are useful/necessary that might not be?</p> <ul style="list-style-type: none"> • Do Subjects need to be displayed in Inventory? <ul style="list-style-type: none"> • Discuss this when Access Services is present • Notes display (5XX fields) <ul style="list-style-type: none"> • Who else has a stake in this? Acquisitions? Circ? <p>From Huda Khan to Everyone: 01:32 PM Is there a data flow diagram (MARC to Inventory, Inventory to X, etc.)? (there may already be, but it would help perhaps people like me with this discussion although I think I'm getting the gist)</p> <p>From Laura Wright (she/her) to Everyone: 01:33 PM yes -- I'll look for it this may be too convoluted -- there are simpler versions somewhere: https://docs.google.com/drawings/d/1rNxuH6H-iUbibawXsLQhhAvAx3CE2ZbluO8m9l-bOGM/edit</p> <p>From Nick Cappadona to Everyone: 01:35 PM You may also find this diagram re: data-import useful: https://docs.google.com/drawings/d/1IN2t0T838HtHytNctdugQN0nL8_KSJ-PzysQxSyZ1Hc/edit</p>	
	Any other old business?		
	New Business	Phil	<p>SSO is working!</p> <ul style="list-style-type: none"> • In the future, we will want all folks using SSO
	Any new business?		

2020-08-24

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Jason, Peter, Andy, Jenn, Jesse, Darcy,

Regrets: Nick, Frances,

Discussion Items

Time	Item	Who	Notes	Actions
	House keeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> September FOLIO Friday: September 18 Reporting sub-group update <ul style="list-style-type: none"> Looking into LDP hosting location EBSCO says no direct connect Support SIG update CUL Support update IndexData OCLC project update Training team update 	
	Old Business			
		All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPagelId=11100</p> <ul style="list-style-type: none"> Look at Showstoppers esp. UXPROD-1752 - looks like this will not be done Jesse will escalate issue to PC Debra will get JIRA report of comments re: workarounds 	
	Any other old business?			
	New Business	Debra	<p>New Release Schedule: https://docs.google.com/presentation/d/14mwkpd4z4xNgqoyq2S4FSAp4cJNUUeZ8VuqtOKwxk/edit#slide=id.p1</p>	
		Debra	<p>Holly: At the Capacity Planning Group meeting today we reached a good compromise on what we will propose to the PC for the new release schedule. We are recommending the Updated Original Cap Plan Proposal as shown on the left side of this slide: https://docs.google.com/presentation/d/14mwkpd4z4xNgqoyq2S4FSAp4cJNUUeZ8VuqtOKwxk/edit?usp=sharing</p> <p>I was satisfied when we agreed to release Iris on March 1, giving implementing sites 4 months to test. That was my main concern. My Alternative Proposal was good except that Bugfest would be huge given it would be the size of two releases. We can barely handle Bugfest now. The Capacity Planning Group has agreed that we need to improve our release process so that we can do more releases instead of fewer, but for now we will schedule 3 releases per year instead of 4.</p> <p>The PC isn't meeting this week, so we are going to pass the proposal to the PC Exec ASAP.</p>	

	Any new businesses?			

2020-08-31

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Jason, Peter, Andy, Jenn, Jesse, Darcy, Nick, Frances,

EBSCO: Patty, Molly, Alex,

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> September FOLIO Friday: September 18 Reporting sub-group update Support SIG update CUL Support update <ul style="list-style-type: none"> I heard back from Zsuzsa - they do not have the bandwidth to help right now IndexData OCLC project update <ul style="list-style-type: none"> I reached out to Mike Gorrell at IndexData directly. Looks like it hasn't started, but he is still confident that it will be done by the original October date. <p>"We are kicking off next week and at this time still expect to complete in October. We'll create a Slack channel and schedule weekly calls next week as well."</p> Training team update <ul style="list-style-type: none"> Kickoff September 10th Anya has download of Test Rails cases for Cornell to customize for training: https://docs.google.com/spreadsheets/d/1dXv7myluGHlBAlIOG134oPLZJ7BrpJAN/edit#gid=1022111148 ERM Tasks App <ul style="list-style-type: none"> Emma Raub will represent Cornell on a new working group from August 31 - December 31 	
	Old Business	Patty /Molly	<p>EBSCO updates</p> <ul style="list-style-type: none"> Status of <ul style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-2092 (searching in Users) <ul style="list-style-type: none"> Not a showstopper - Patty will update https://issues.folio.org/browse/UXPROD-1400 (adding statistical categories). These are ranked critical for Cornell <ul style="list-style-type: none"> Sharon will work with Joanne to determine priority, and Patty, if needed This is the recording of the 7/1/2020 User Mgmt. SIG meeting, if anyone is interested in watching: https://drive.google.com/drive/folders/0B7G8S7WF6N20U21LYUdCMC1HTFE 	
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100	
	Any other old business?			
	New Business			
		Debra	Review JIRA search for potential Workaround not empty and Cornell rank is not empty https://issues.folio.org/issues/?filter=12502	
	Any new business?			

2020-09-14

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Jesse, Darcy, Frances

EBSCO: Anya, Molly

Regrets: Jason, Andy, Nick, Patty

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> September FOLIO Friday: September 18- CANCEL October - Data Migration Reporting sub-group update <ul style="list-style-type: none"> Focus group went exceptionally well Follow-up survey out this week Support SIG update <ul style="list-style-type: none"> Explore Sessions Recordings - created based on feedback IndexData OCLC project update <ul style="list-style-type: none"> Laura taking lead Project document for review: https://docs.google.com/document/d/1CVPkXiT2feYWyKdt9zyFU5aqym_4-pUugpVkRes_RI/edit Training team update <ul style="list-style-type: none"> Kickoff September 10th Anya has download of Test Rails cases for Cornell to customize for training: https://docs.google.com/spreadsheets/d/1dXv7myluGHlAlOG134oPLZJ7BrpjAN/edit#gid=1022111148 	
	Old Business	Anya	<p>EBSCO Updates</p> <ul style="list-style-type: none"> Goldenrod upgrades <ul style="list-style-type: none"> TEST done tomorrow at 9am TRAINING - Ryan back from vacation tomorrow and will schedule PROD: <ul style="list-style-type: none"> I will be working on migrating https://cornell.folio.ebsco.com/ to Goldenrod. I will be taking a snapshot of your current database on 09/17 Thursday 8am eastern. I will use this snapshot to populate/build a Goldenrod environment that mirrors your current production. <ul style="list-style-type: none"> The snapshot will be loaded into the mirrored environment, but this does not prevent work from continuing in the production environment The mirrored environment will allow for testing with your own current (as of 09/17 at 8am) data. <p>The URL of mirrored environment will be https://cornell-dryrun.folio.ebsco.com/. I'm planning to get this environment ready by 09/23 8am eastern. A few things that need to be known about mirrored environments:</p> <ul style="list-style-type: none"> Testers will be able to log in with their normal credentials and will have the same permission sets Links to HLM will be live, so selecting and unselecting of titles and packages will impact the end user (patrons) <p>Like last time, EBSCO will allot 5 working days for Cornell to test, you can have less or more time, that is up to you. When you approve of the settings and functions in mirrored environment then we can all set a date in which the true upgrade will take place. This will mean a work freeze for several hours as a new snapshot of the data is made and the upgrade to the environment is built. Once those processes are complete then you will be able to continue working as normal.</p> <ul style="list-style-type: none"> ERM: https://issues.folio.org/browse/ERM-1118 <ul style="list-style-type: none"> Currently not affected 	
		Debra	<ul style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-1400 (adding statistical categories). These are ranked critical for Cornell <ul style="list-style-type: none"> Sharon will work with Joanne to determine priority, and Patty, if needed 	DONE - Not Needed
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100	
		Debra	"Get Acquainted" sessions beginning September 22nd. What do we want to do with these?	CANCEL
		Debra	<p>Do we want to add someone else to this working group?</p> <p>Hey all. @Debra Howell and @jak473, apologies if I stated that the Task Management app was for ERM only in the demo. It was definitely a mistake as it never was intended to be an ERM only function. As I stated in the demo, we reviewed library literature and all requirements/use cases outlined by the FOLIO community in regards to Task Management development. Most use cases were tied to ERM activity but some were not. As a result we decided to make the Task Management an app not embedded in any app.</p>	All set

	Jesse	<p>At PC today: Optimistic Locking: Record "locking" functionality Definitions: Optimistic concurrency control - Wikipedia Two events trying to update a record at the same time - one process wins but the "loser" doesn't know that their change didn't take FOLIO has some challenges related to architecture choices and microservices implementation. What TC is proposing: Introduce a record version concept inside FOLIO to fix this, will take a while to get this into all of the teams, will target critical modules for Mar 1. (edited) We should think about which apps or record types we think are most critical to have this implemented, then push at the appropriate SIGs for it.</p> <p>Laura Wright 🙄 9:57 AM It might be easier to identify the record types this is not critical for.</p> <ul style="list-style-type: none"> • Batch processing, inventory records, BIBS, • comment on the ticket Uxprod-1752 Jakub reports that the Spike for optimistic blocking (RMB-719) is almost done. It should be available for the devs to start integrating in 2 weeks or so. We will start by integrating it into one app and see what happens. Won't be fully implemented everywhere in the Honeysuckle release but should be for Iris. 	
	Any other old businesses?		
	New Businesses		
	Debra	<p>Review JIRA search for potential Workaround not empty and Cornell rank is not empty https://issues.folio.org/browse/UXP/PROD-2536?filter=12502</p> <ul style="list-style-type: none"> • Laura, Debra, Jenn 	
	Debra	<p>New FOLIO Rankings: https://wiki.folio.org/pages/viewpage.action?spaceKey=DQA&title=Defect+Priority+Definition+for+Functional+Issues</p> <p>At the Implementation SIG meeting we agreed that Holly will convert the current JIRA rankings to R1-R5 with this mapping:</p> <p>R1=Go live 1:20 R2=Can wait a quarter R3=Can wait for FYRO R4=Can wait a year R5=NOT Needed</p> <p>There will not be a separate ranking for FYRO features. ALL institutions participating in the rankings should go to the three features Tom identified above (uxprods 772, 203, and 201) and rank them as R1 or go-live. If we all do that the FYRO features should start being worked on for Iris development. (edited) 1:22</p> <p>We also came up with stop-gap definitions for R1-R5 1:23 Paula Sullenger 1:23 PM R1 = Urgent - this feature is needed immediately R2 = High - this feature is needed ASAP, at least in next release R3 = Medium - workaround is deficient, needs to be fixed R4 = Low - needed, but we can work around for a while R5 = Not needed</p>	
	Any new businesses?	<ul style="list-style-type: none"> • Robbie, Nick, Frances working on Development server <ul style="list-style-type: none"> • Working on local integrations • Jenn has set up every other week Acquisitions meetings to kick that off • Sharon <ul style="list-style-type: none"> • Course Reserves integration questions • In App vs LDP reports in the Finance and Acquisitions areas 	

2020-09-21

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Darcy, Frances, Jason, Andy, Nick, Patty

Regrets: Jesse - off for the afternoon

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> October 16 - Data Migration Reporting sub-group update Support SIG update IndexData OCLC project update Training team update 	
	Old Business	Debra	Reminder of PROD upgrade to Goldenrod: <ul style="list-style-type: none"> Snapshot of your current database on 09/17 Thursday 8am eastern. The URL of mirrored environment will be https://cornell-dryrun.folio.ebsco.com/ and will be ready by 09/23 8am eastern. A few things that need to be known about mirrored environments: <ul style="list-style-type: none"> Testers will be able to log in with their normal credentials and will have the same permission sets Links to HLM will be live, so selecting and unselecting of titles and packages will impact the end user (patrons) Like last time, EBSCO will allot 5 working days for Cornell to test What date would we like the 4 hour downtime to be? 	October 1
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100	
		Debra /Jenn /Laura	Review JIRA search for potential Workaround not empty and Cornell rank is not empty https://issues.folio.org/browse/UXPROD-2536?filter=12502	
		Debra	New FOLIO Rankings: https://docs.google.com/spreadsheets/d/1KxWryvOhqZNwYbGaj8jKDCBaf9THV4piOm3RUrvqVcg/edit#gid=0	
	Any other old business?			
	New Business			
	Any new business?			

2020-09-28

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Jesse, Darcy, Frances, Andy, Nick, Patty

EBSCO: Anya, Molly, Theodor

Regrets: Jason,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> October 16 - Data Migration Reporting sub-group update <ul style="list-style-type: none"> Writing up the recommendation formally Support SIG update IndexData OCLC project update <ul style="list-style-type: none"> Deliverable in November Training team update 	
	Old Business	Anya	<p>EBSCO Updates:</p> <p>Reminder of PROD upgrade to Goldenrod:</p> <ul style="list-style-type: none"> Snapshot of your current database on 09/17 Thursday 8am eastern. The URL of mirrored environment will be https://cornell-dryrun.folio.ebsco.com/ and will be ready by 09/23 8am eastern. A few things that need to be known about mirrored environments: <ul style="list-style-type: none"> Testers will be able to log in with their normal credentials and will have the same permission sets Links to HLM will be live, so selecting and unselecting of titles and packages will impact the end user (patrons) Like last time, EBSCO will allot 5 working days for Cornell to test October 1 	
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100	
		Debra /Jenn /Laura	<p>Review JIRA search for potential Workaround not empty and Cornell rank is not empty https://issues.folio.org/browse/UXPROD-2536?filter=12502</p> <p>https://issues.folio.org/browse/UXPROD-1636 - no need to comment</p> <p>https://issues.folio.org/browse/UXPROD-1056 - no need to comment</p> <p>https://issues.folio.org/browse/UXPROD-1015 - comment to PO (Patty notes that this needs Stories)</p> <p>https://issues.folio.org/browse/UXPROD-875 -</p> <p>https://issues.folio.org/browse/UXPROD-845</p> <p>https://issues.folio.org/browse/UXPROD-532</p> <p>https://issues.folio.org/browse/UXPROD-284</p> <p>https://issues.folio.org/browse/UXPROD-105</p> <p>https://issues.folio.org/browse/UXPROD-100</p> <p>Showstoppers:</p> <p>https://issues.folio.org/browse/UXPROD-2615</p> <p>https://issues.folio.org/browse/UXPROD-2551</p> <p>https://issues.folio.org/browse/UXPROD-2200</p> <p>https://issues.folio.org/browse/UXPROD-1800</p> <p>https://issues.folio.org/browse/UXPROD-1752</p> <p>https://issues.folio.org/browse/UXPROD-1407</p> <p>https://issues.folio.org/browse/UXPROD-932 - Anya tagged Mark V.</p>	

		Debra	<p>Just in case you're not in this loop - Cate posted this info on optimistic locking in the PO channel. Cate Boerema [3:45 AM]</p> <p>Hj POs. I wanted to give you an update on optimistic locking. Since there are so many interested parties, we thought a forum-type meeting would be best for furthering the conversation. @jakub is going to prepare a deck explaining why optimistic locking was selected and detailing a couple of specific proposals within that. In addition to getting feedback on the proposals, Jakub will also be looking for answers to questions such as:</p> <ul style="list-style-type: none"> why collision detection is deemed important in FOLIO? should collision detection be implemented for all record types in FOLIO (across all modules) or only in selected cases? should collision detection work only for certain clients — e.g users editing records through the FOLIO UI — or all clients accessing FOLIO APIs, including batch processes (that may be changing records behind the scene) <p>We talked about starting with an "internal" presentation (meaning POs and tech folks) before presenting to the broader community. @jakub or I will reach out with more info when he's ready with his deck. In the meantime, if you are interested in learning more, here are some materials you can review:</p> <p>Recent tech design for optimistic locking https://wiki.folio.org/display/DD/Optimistic+locking+proposal Old Wolfcon deck that explains why optimistic locking was selected: https://docs.google.com/presentation/d/1vOy4GuiTR0qnHpUI3RH_0ULz4dVq1McERPqT23U-GY/edit#slide=id.p UXPROD feature: https://issues.folio.org/browse/UXPROD-1752 Recently added a user story for implementing OL in Inventory: https://issues.folio.org/browse/UIIN-1245 Old bug reported by GBV https://issues.folio.org/browse/FOLIO-2027</p>	
	Any other old business?			
	New Business			
	Any new business?			

2020-10-05

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Jesse, Darcy, Frances, Andy, Jason,

Regrets: Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> October 16 - Data Migration Reporting sub-group update Support SIG update IndexData OCLC project update <ul style="list-style-type: none"> Deliverable in November Training team update 	
	Old Business	All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPagelD=11100</p> <p>Two OAI-PMH features need ranking. The scope of UXPROD-2403 has changes as one of the stories originally included is now a separate feature: UXPROD-2720</p> <p>Go Live Rankings - 85 not scheduled to be completed before Go Live</p> <p>https://cornell.app.box.com/file/727063283462</p>	Complete R1 assessments by October 23rd
		Debra	<p>Just in case you're not in this loop - Cate posted this info on optimistic locking in the PO channel. Cate Boerema [3:45 AM]</p> <p>Hi POs. I wanted to give you an update on optimistic locking. Since there are so many interested parties, we thought a forum-type meeting would be best for furthering the conversation. @jakub is going to prepare a deck explaining why optimistic locking was selected and detailing a couple of specific proposals within that. In addition to getting feedback on the proposals, Jakub will also be looking for answers to questions such as:</p> <p>why collision detection is deemed important in FOLIO? should collision detection be implemented for all record types in FOLIO (across all modules) or only in selected cases? should collision detection work only for certain clients — e.g users editing records through the FOLIO UI — or all clients accessing FOLIO APIs, including batch processes (that may be changing records behind the scene)</p> <p>We talked about starting with an "internal" presentation (meaning POs and tech folks) before presenting to the broader community. @jakub or I will reach out with more info when he's ready with his deck. In the meantime, if you are interested in learning more, here are some materials you can review:</p> <p>Recent tech design for optimistic locking https://wiki.folio.org/display/DD/Optimistic+locking+proposal Old Wolfcon deck that explains why optimistic locking was selected: https://docs.google.com/presentation/d/1vOy4GuITR0qnHpUI3RH_0ULz4dVq1McERPqbtZ3U-GY/edit#slide=id.p UXPROD feature: https://issues.folio.org/browse/UXPROD-1752 Recently added a user story for implementing OL in Inventory: https://issues.folio.org/browse/UIIN-1245 Old bug reported by GBV https://issues.folio.org/browse/FOLIO-2027</p>	
		Debra	<p>LEG update</p> <ul style="list-style-type: none"> Workload balancing (remind folks that they would make sure they had time to work on FOLIO) Updates on training plan D&A: A list of things that FOLIO supports that are not currently OPAC that we want add (ex: a patron can have a preferred pick-up location set) ==> POSSIBLE FOLIO FRIDAY TOPIC TOO 3 releases a year - go live on Iris 	

		Debra	<p>Issues Tracking:</p> <ol style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-1015 - Patty added a comment that the user management SIG has ascertained that the current searching capabilities of the user app meet the requirements, so are not pursuing stories for this ticket. 9/16/2020 - Boolean searching IS available currently. https://issues.folio.org/browse/UXPROD-875 - Looks like User Stories have been added https://issues.folio.org/browse/UXPROD-845 - emailed Holly https://issues.folio.org/browse/UXPROD-532 - Emma has requested that this get re-estimated and split from UXPROD-2716 https://issues.folio.org/browse/UXPROD-284 - (go look at Cate's note and comment what we think) https://issues.folio.org/browse/UXPROD-105 - emailed Holly https://issues.folio.org/browse/UXPROD-100 - emailed Holly <p>Showstoppers:</p> <ol style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-2615 - Q3 2020 https://issues.folio.org/browse/UXPROD-2551 - Q3 2020 https://issues.folio.org/browse/UXPROD-2200 https://issues.folio.org/browse/UXPROD-1800 https://issues.folio.org/browse/UXPROD-1752 https://issues.folio.org/browse/UXPROD-1407 https://issues.folio.org/browse/UXPROD-932 - Anya tagged Mark V. 	
	Any other old businesses?			
	New Business	Debra	<p>Folks - Emma is requesting validation of the following Item Statuses in FOLIO. The first chunk are already there, and she is proposing 4 additional statuses. Will this meet our needs?</p> <p>Other values needed?</p> <ul style="list-style-type: none"> On order Order closed In process Available In transit Paged Awaiting pickup Awaiting delivery Missing Withdrawn Lost and paid Checked out Claimed returned Declared lost Aged to lost Unavailable Analytic Long missing In process, non-requestable 	Yes, these will meet our needs. Jenn notes we were able to map all the item statuses.
		Laura	<p>Charlotte Whitt (Inventory PO) has asked each institution to indicate our preferred item record list display (both which columns to display and the order in which to display them) Is there room in next week's agenda to review this? Or should we try to have a separate call just for those of us with "stakes" in this (anyone using Inventory)? https://docs.google.com/presentation/d/1UeEi-UqVaH7cdZYQv0NOzYyCYIOJ2dvF17vzlaJyZoc/edit#slide=id.g97f23f94ff_0_145</p>	
	Any new businesses?	Jenn	<p>Communication - TS-Voyage list</p> <ul style="list-style-type: none"> Re-create list for FOLIO to announce upgrades and bugs 	
		Jesse	Product Council is looking at reviving the Privacy SIG	

2020-10-12

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jenn, Jesse, Frances, Jason, Andy, Huda,

EBSCO: Anya, Molly, Kyle, Nancy, Theodor, Patty

Regrets: Darcy, Ann, Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		Don't forget your homework by October 23rd 😊	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> October 16 - Data Migration November - Integrations updates Support SIG update IndexData OCLC project update Training team update <ul style="list-style-type: none"> Honeysuckle Bug Fest October 26-30 e-list FOLIO-ANNOUNCE-L has been created and current subscribers of tsvoyage have been subscribed <ul style="list-style-type: none"> Who else should be added? Subscribe to ebco outages pertaining to us 	
	Old Business	Anya	<p>EBSCO Updates:</p> <ul style="list-style-type: none"> Follow-up meeting re: database access <ul style="list-style-type: none"> What are the use cases for LS-tools (and beyond) that you are currently solving with Voyager databases access? What are the current FOLIO short-comings that prevent Cornell from solving the above (issues/problems /interrogations) without direct database access? Outside of direct database access, what other solutions would prove valuable? Schedule additional meeting for LDP hosting Creating schedule for Hotfix 3 and 4 <ul style="list-style-type: none"> Prod can wait for Hotfix 4 Test needs Hotfix 3 asap Working with Access Services to get patron groups and permissions set Acquisitions team worked through settings; now working on data Welcome Kyle 	
		All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100</p> <p>Please take a look at https://issues.folio.org/browse/UXPROD-2320. It is the remains of a ticket that put several features into one. Please check your ranking, and also rank the new feature tickets which are linked in the "relates to" section, https://issues.folio.org/browse/UXPROD-2731 and https://issues.folio.org/browse/UXPROD-2732</p>	
		Jesse	Product Council's reboot of Privacy SIG: Adam Chandler will serve from Cornell	
	Any other old business?			
	New Business			
		Debra	<p>As follow up from LEG presentation, LEG would like to know which staff feel they do not have enough time for their FOLIO work or are feeling overburdened by it. How should we accomplish compiling this information?</p> <ul style="list-style-type: none"> Access Services: everyone...or no one LTS: 6 month backlog of materials balanced with reserving time for training Rather than a list of names, AULs should work with their managers to prioritize FOLIO and deprioritize other areas where possible Reduced capacity due to lost staff members Suggest adding a FOLIO goal to performance dialogue 	

		Debra /Anya	<p>Discussion/brainstorming go-live cutover process</p> <ul style="list-style-type: none"> • Review what Chalmers and MSU did • Brainstorm steps • Dry run • What are our worries and concerns? • Devote October 26th meeting to this topic 	
	Any new business?			

2020-10-19

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Jesse, Frances, Jason, Andy, Nick

Regrets: Darcy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		Don't forget your homework by October 23rd 😊 Review: https://cornell.app.box.com/file/727063283462	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • FOLIO Friday - <ul style="list-style-type: none"> • October 16 - Data Migration debrief • November FOLIO Friday - Integrations (Phil) • Support SIG update • IndexData OCLC project update • Training team update • e-list FOLIO-ANNOUNCE-L has been created and current subscribers of tsvoyage have been subscribed <ul style="list-style-type: none"> • Who else should be added? • Subscribe to ebSCO outages pertaining to us • Other admins? <ul style="list-style-type: none"> • Amy 	
	Old Business			
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100 <ul style="list-style-type: none"> • Laura: https://issues.folio.org/browse/UXPROD-2002 <ul style="list-style-type: none"> • Sharon will provide input on whether or not this is critical 	
	Any other old business?			
	New Business	All	Anyone want to share updates from their area?	
	Any new business?			

2020-10-26

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Jesse, Darcy, Frances, Jason, Andy, Nick

EBSCO: Anya, Patty, Theodor

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<p>Iris Capacity Planning Milestones</p> <ol style="list-style-type: none"> 1. 2020-10-05 - Initial PO recommendations submitted (see below linked deck for details on how) 2. 2020-10-07 - Cap plan model refreshed with new data 3. 2020-10-12 to 2020-10-26 - Development of draft Iris plan 4. 2020-10-19 - POs update JIRA with Honeysuckle splits and spillover 5. 2020-10-23 to 2020-10-30 - Draft Iris plan revised as-needed 6. 2020-10-26 to 2020-11-06 - Development of final Iris plan 7. 2020-11-12 - Final Iris plan proposal complete and presented to PC 8. 2020-11-23 - Honeysuckle release 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> • Is homework done? <ul style="list-style-type: none"> • Review: https://cornell.app.box.com/file/727063283462 • FOLIO Friday - <ul style="list-style-type: none"> • November 13th FOLIO Friday - Integrations (Phil) • Support SIG update • IndexData OCLC project update • Training team update <ul style="list-style-type: none"> • Bug Fest October 26-30 	
	Old Business			
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPagelId=11100	
		Anya	<p>EBSCO Updates</p> <ul style="list-style-type: none"> • Prod, Test, and Training are on Goldenrod Hot Fix 4 • When will CaiaSoft integration be needed? <ul style="list-style-type: none"> • By Go-Live • Vendor might do development • Goal is for it to be working in Iris • Jenn - is there anything we can be doing? 	

	Debra / Anya	Discussion/brainstorming go-live cutover process	
		<ul style="list-style-type: none"> • Review what Chalmers (on site) and MSU (remote) did <ul style="list-style-type: none"> • Chalmers <ul style="list-style-type: none"> • On site for 2 weeks four weeks before they went live • Full dress rehearsal of going live • No need to stop acquisitions • Stopped cataloging a week and a half before go live • Stopped requesting one week before go live • Put a note in there ERM of when to come back • Integrations in real time during dress rehearsal • MSU <ul style="list-style-type: none"> • EDS and FOLIO connected in May (before June 6 go-live) • Tested only for a month • 2 hour training sessions for each functional area; including POs • Virtual dress rehearsal • Internet connection issues when it rained in Missouri • Stopped acquisitions May 1 • Closed books and restarted them in FOLIO • Stopped cataloging in March • Stopped requests the weekend before go-live so requests could be loaded at the same time • About 12 hours for data loads <ul style="list-style-type: none"> • Important part of dress rehearsals is to get timings set to create schedule • Brainstorm steps - TENTATIVE AND DRAFT <ul style="list-style-type: none"> • Inform selectors to not place any more orders <ul style="list-style-type: none"> • April 1 • Stop editing vendor records (addresses, etc.) <ul style="list-style-type: none"> • May 3 • Stop new acquisitions <ul style="list-style-type: none"> • June 1 • Stop adding and updating bibliographic and holdings <ul style="list-style-type: none"> • June 14 • Stop adding and updating item data <ul style="list-style-type: none"> • June 14 • Stop requests <ul style="list-style-type: none"> • June 21 • Close books Voyager and re-open in FOLIO <ul style="list-style-type: none"> • June 21 • Stop circulation in Voyager (off-line circ options?) <ul style="list-style-type: none"> • June 21 • Training Plan (Training Team) • Dry run - dress rehearsal • What are our worries and concerns? <ul style="list-style-type: none"> • Allowable/acceptable downtime <ul style="list-style-type: none"> • Current thinking is perhaps a day or two might be okay • This might be too tight 	
	Any other old business?		
	New Business		
	Any new business?		

2020-11-02

Attendees

Sharon, Laura, Debra, Huda, Ann, Jean, Phil, Peter, Jenn, Jesse, Darcy, Frances, Andy, Jason, Nick

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions										
	Housekeeping													
	Announcements													
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> November 13 - Integrations Support SIG update IndexData OCLC project update <ul style="list-style-type: none"> Deliverable in November Training team update <ul style="list-style-type: none"> Bug Fest update 											
	Old Business	All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jsps?selectPagelId=11100</p> <p>Review: https://cornell.app.box.com/file/727063283462</p> <table border="1"> <tr> <td>UXPROD-2284</td> <td>Inventory. Receive item data/update item record as part of receiving process</td> </tr> <tr> <td>UXPROD-2133</td> <td>Create an Action Log to capture Accurate Loan Edits -- for reporting purposes</td> </tr> <tr> <td>UXPROD-2120</td> <td>support for upgrading schemas without complete reload of data (DB migrations) - rollout + devops</td> </tr> <tr> <td>UXPROD-2170</td> <td>Store Effective Copy Number</td> </tr> <tr> <td>UXPROD-105</td> <td>Automated Transfer of fees/fines to bursar or other account</td> </tr> </table> <p>https://issues.folio.org/browse/UXPROD-2467 Configure storage/display of user info when storing transactions I'm not aware of how this became an R1 for Cornell – it sounds like a new feature that would be nice, but not really a showstopper? I'd give it an R4. Thoughts?</p>	UXPROD-2284	Inventory. Receive item data/update item record as part of receiving process	UXPROD-2133	Create an Action Log to capture Accurate Loan Edits -- for reporting purposes	UXPROD-2120	support for upgrading schemas without complete reload of data (DB migrations) - rollout + devops	UXPROD-2170	Store Effective Copy Number	UXPROD-105	Automated Transfer of fees/fines to bursar or other account	
UXPROD-2284	Inventory. Receive item data/update item record as part of receiving process													
UXPROD-2133	Create an Action Log to capture Accurate Loan Edits -- for reporting purposes													
UXPROD-2120	support for upgrading schemas without complete reload of data (DB migrations) - rollout + devops													
UXPROD-2170	Store Effective Copy Number													
UXPROD-105	Automated Transfer of fees/fines to bursar or other account													
	Any other old business?													
	New Business													
	Any new business?													

2020-11-09

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jenn, Jesse, Darcy, Frances, Andy, Jason, Nick

EBSCO: Anya, Patty, Theodor

Regrets: Ann, Huda

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none">• FOLIO Friday -<ul style="list-style-type: none">• November 13 - Integrations• Chicago NOT deferring• Support SIG update• IndexData OCLC project update<ul style="list-style-type: none">• "we've had some delays but have nailed down requirements. I'm updating Jiras now and the developers are beginning to engage. I'll have a schedule update later this week."• R1• Training team update• Anya - EBSCO updates:<ul style="list-style-type: none">• LDP hosting - ready to go but need to figure out access given private IP addresses• Access Services items to add to FOLIO - Anya will complete this week	

<p>Old Business</p>	<p>All</p>	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100</p> <p>https://issues.folio.org/browse/UXP-2467 Configure storage/display of user info when storing transactions I'm not aware of how this became an R1 for Cornell – it sounds like a new feature that would be nice, but not really a showstopper? I'd give it an R4. Thoughts?</p> <p>https://issues.folio.org/browse/UXP-2120 - EBSCO update: "This is not critical - since EBSCO will do this for you - but it is practical to keep it an R1"</p> <p>https://issues.folio.org/browse/UXP-2133 - Sharon update</p> <p>Users</p> <p>https://issues.folio.org/browse/UXP-2467</p> <p>Currently each tenant does allow you to see who has done what actions as staff. This ticket is to allow libraries that do not want that ability to configure it.</p> <p>Patron Notices</p> <p>https://issues.folio.org/browse/UXP-2252</p> <p>Currently a patron get an email for each item they have over due or fee fines. This ticket would allow for many items to be on the same email.</p> <p>https://issues.folio.org/browse/UXP-932</p> <p>I am verifying, but I believe this is not an issue since you are hosting with us.</p> <p>Loans</p> <p>https://issues.folio.org/browse/UXP-2430</p> <p>This is about adding the date and time to a loan when it was last renewed. The due date of the item is adjusted.</p> <p>https://issues.folio.org/browse/UXP-2133</p> <p>This is for reporting.. the current data that is available is: Patron ID, Patron Name, Patron Group, Item ID, Loan policy, Effected location at time of check out, and loan date.</p> <p>https://issues.folio.org/browse/UXP-532</p> <p>In scope :</p> <p>Create field on loan for number of times searched.</p> <p>When an item is claimed returned, allow users to increment number of searches. Reflect this action in loan details action history.</p> <p>Allow tenant to configure max number of searches, and when max number of searches is reached, prevent them from incrementing searches.</p> <p>Require permission for adding search</p> <p>Track "add search" action in the circulation log</p> <p>Inventory</p> <p>https://issues.folio.org/browse/UXP-2002</p> <p>Is call number sorting a showstopper for go live?</p> <p>Circulation log/reports</p> <p>https://issues.folio.org/browse/UXP-1407</p> <p>The circulation log is in progress, possibly to make the Honeysuckle release, and it will include all information listed on this feature.</p>	
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		All	<ul style="list-style-type: none"> • Brainstorm steps - TENTATIVE AND DRAFT <ul style="list-style-type: none"> • Stop editing vendor records (addresses, etc.) <ul style="list-style-type: none"> • May 3 <ul style="list-style-type: none"> • For data migration, since this data doesn't change a lot, it would give us time to pre-move and use our time later for other things. • Stop new acquisitions <ul style="list-style-type: none"> • June 1 <ul style="list-style-type: none"> • Inform selectors to not place any more orders • Stop adding and updating bibliographic and holdings <ul style="list-style-type: none"> • June 14 <ul style="list-style-type: none"> • Data migration - a lot of data to move • Stop adding and updating item data <ul style="list-style-type: none"> • June 21 • Stop requests <ul style="list-style-type: none"> • June 21 • Close books Voyager <ul style="list-style-type: none"> • June 21 • Stop circulation in Voyager (off-line circ options?) <ul style="list-style-type: none"> • June 21 <ul style="list-style-type: none"> • At least 24-hours to migrate circ data • Re-open books in FOLIO <ul style="list-style-type: none"> • July 1 • Training Plan (Training Team) • Dry run - dress rehearsal • What are our worries and concerns? <ul style="list-style-type: none"> • Allowable/acceptable downtime <ul style="list-style-type: none"> • Current thinking is perhaps a day or two might be okay • This might be too tight 	Jenn, Theodor, Frances, Anya to meet to discuss details.
	Any other old business?			
	New Business	Sharon	New proposed FOLIO Governance Model <ul style="list-style-type: none"> • Simeon and Gerald have reviewed - tentatively approved 	
	Any new business?			

2020-11-30

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jesse, Frances, Andy, Jason, Nick, Ann, Huda

EBSCO: Anya

Regrets: Jenn, Darcy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Brooks Travis (Missouri State), Paula Sullenger (TAMU), Laura Daniels, and my proposal for "FOLIO: For Libraries, By Libraries," has been accepted for presentation at the 2021 American Library Association Annual Conference. "Your proposal was reviewed and selected by the Core: Leadership, Infrastructure, Futures division's Conference Program Coordination Committee. We received over 80 proposals and we were able to accept 30 of them." We have access to the hosted LDP! <ul style="list-style-type: none"> We have requested to be added to the January EBSCO FOLIO Analytics Beta 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> November debrief Do we want to have a December FOLIO Friday? Topics? <ul style="list-style-type: none"> Cancel Honeysuckle upgrades: all Cornell tenants will be done at the same time before Dec 24th <ul style="list-style-type: none"> Set dates will be announced after Honeysuckle is released 	
	Old Business	All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100</p> <p>Showstoppers review</p> <ul style="list-style-type: none"> Hire https://issues.folio.org/browse/UXPROD-1407 and https://issues.folio.org/browse/UXPROD-105 Using capital funds contingency; approved by CIT PMO and CUL Need Product Owner: <ul style="list-style-type: none"> Phil for 105 Andy for 1407 <ul style="list-style-type: none"> From Joanne: <ul style="list-style-type: none"> My take on There's a version of it now in bugfest-honeysuckle: https://bugfest-honeysuckle.folio.ebsco.com/circulation-log?itemBarcode=111103 <ul style="list-style-type: none"> It is comprehensive Extremely nice filtering features (filters by date range, service point, loan history component – stellar!) Search by barcode needs re-tooling: should be an exact-match search, or else incorporate a wildcard function; currently yields a ton of inapplicable results Date format should be short-version and uniform in all fields wherever a date appears (mm/dd/yyyy HH:mm:ss). We don't need or want the long version (ex: New due date: 2020-11-16T16:38:50.000Z (from 2020-11-16T16:38:50.000Z), we also don't need the time zone component. If that's not possible, will date displays be customizable at the tenant level? It is massively difficult to read on-screen, particularly the jam-packed information in the Description field. We absolutely must have csv export in order to make this truly usable – is that planned? Thanks for doing this 	
		Sub-group	<p>Updates to our cutover plan https://docs.google.com/spreadsheets/d/1Tch-1FvFcA51NQnr_dmGlaWSJelVQAxD33KcZZTw/edit?usp=sharing</p>	
	Any other old business?			
	New Business	Phil	<p>Off-line Circ app update</p> <ul style="list-style-type: none"> John F has created a self-standing app (really quickly) Working on making it work with a barcode scanner Notify Frances so a notice goes on the public site 	

	Any new business?			

2020-12-07

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jesse, Frances, Andy, Jason, Nick, Ann, Huda, Jenn,

EBSCO: Patty, Molly

Regrets: Darcy,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements			
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> January topic <ul style="list-style-type: none"> Training Cutover 	
	Old Business	Anya	<p>EBSCO Updates:</p> <ul style="list-style-type: none"> Honeysuckle upgrades: all Cornell tenants will be done at the same time before Dec 24th <ul style="list-style-type: none"> Set dates will be announced after Honeysuckle is released Cutover plan: https://cornell.app.box.com/file/748697137673 <ul style="list-style-type: none"> https://docs.google.com/spreadsheets/d/1Tch-1FvFcA51NQnrt_dmGlaWSJeLvQAxDDA33KcZZTw/edit#gid=0 	
		All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11100</p> <p>One of our Criticals that is scheduled to be in Iris is on the "At Risk" List: https://issues.folio.org/browse/UXPROD-2696?jql=labels%20%3D%20r1-2021-at-risk</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-1130 https://issues.folio.org/browse/UXPROD-195 - not currently listed as critical very important <ul style="list-style-type: none"> We will need to manage expectation; internal and vendor What would the FTE estimate be if we need to do this manually? 	
	Any other old businesses?			
	New Business	Andy	<p>Joanne Leary and I have spent the last couple of months working on a spreadsheet (attached in case you're interested) which contains all of the elements of a circulation rule with input from Anya and her team and the members of the Access Services Settings Group I created. The spreadsheet also contains two experimental versions of what a CUL circ rule might look like. At this morning's FOLIO Forum session devoted to circ rules, I asked a question which has been slowly forming in my mind for awhile: who is actually doing the work of creating and maintaining circ rules at other implementing institutions? It's a bit of a mixed bag, and access services people definitely are heavily involved everywhere, but IT people seem to be involved as well at a lot of places, and even running the show at some. This is definitely something I'd like to talk about before we move on to actually creating circ rules for CUL.</p> <ul style="list-style-type: none"> Access Services will own Circ Rules <ul style="list-style-type: none"> Amy Blumenthal will act as backup Who owns permission, in general? What logs are there? <ul style="list-style-type: none"> To answer Phil's question, I'm unaware of an indicator of "last updated by". One of the tips from the forum was to back up your circulation rules somewhere since this is not an element exported to LDP. That way you have external record in case anyone makes an unintended/catastrophic change and you need to recopy/paste back into FOLIO. Links to FOLIO forum for any of your stakeholders who are interested - <ul style="list-style-type: none"> Panel discussion (12/2): https://www.youtube.com/watch?v=HbwQwFdRA0c&t=9s Q&A (12/7): https://drive.google.com/file/d/10mrrrngnvqBUbokguk7XzmPc2MhOnUc3/view?usp=sharing 	
		Phil	Working with CaiaSoft on the integration	

	Any new businesses?			

2020-12-14

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jesse, Frances, Andy, Jason, Nick, Ann, Jenn, Darcy,

Regrets:

Huda

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		TEST and TRAINING instances being upgraded between December 11 - 16 FOLIO Friday - January 8 <ul style="list-style-type: none"> • Training • Cutover 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> • Training Team Update 	
	Old Business			
		All	Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100 List: https://issues.folio.org/browse/UXPROD-2696?jql=labels%20%3D%20r1-2021-at-risk NOTE: we are no longer using "critical" as the label. Holly has added "Showstopper-Cornell" as the label.	
	Any other old business?			
	New Business	Debra	July 2021 Implementers Meeting with Holly https://docs.google.com/document/d/13QQGaWqU-gJts-ujKCx7B5SauntxJy17tOASk9MA8YI/edit https://docs.google.com/document/d/1AlvVa6Bjd25qCs3ITBqLWtjJBX1BldPPO56hq3nTks/edit We'd like more discussion around LDP MARC querying and/or SRS MARC API Query: I'm concerned hearing even AnnMarie speak with rather non-committal language around LDP querying MARC on the current timeline https://issues.folio.org/browse/UXPROD-2791	Sharon will get an update from Nassib on the LDP and MARC querying
	Any new business?			

2021

2021-01-04

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jesse, Frances, Andy, Jason, Huda, Jenn, Darcy,

Regrets: Ann, Nick,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> FOLIO Friday - January 8 <ul style="list-style-type: none"> Training Cutover Iris R1 2021 has been extended for 1 month. <ul style="list-style-type: none"> GA date is April, 5. Feel free to review updated roadmap and timeline at wiki page - https://wiki.folio.org/pages/viewpage.action?pageId=47841907 Additional change - for upgrading to platform components reserved 4 weeks(2 sprints) instead of 2 weeks. Crucial milestones are: <ul style="list-style-type: none"> 15 January 2021 - API Freeze for platform (OKAPI, RMB, Stripes) 5 February 2021 - Modules feature development freeze R1 2021 - Platform core modules 12 February 2021 - Modules feature development freeze R1 2021 - Platform complete modules 15 February - 19 February 2021 - Schema upgrade testing week 26 February 2021 - Module release deadline 8 - 26 March 2021 - R1 2021 Release testing and hardening period5 April 2021 - Release is public 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Training Team Update <ul style="list-style-type: none"> Laura - MM SIG is creating documentation and will share Laura created a FOLIO channel on video on demand if anyone wants to use that for training videos Sharon - Reporting is moving their documentation to GitHub https://docs.folio.org/ 	
	Old Business			
		All	<p>Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100</p> <p>List: https://issues.folio.org/browse/UXPROD-2696?jql=labels%20%3D%20r1-2021-at-risk NOTE: we are no longer using "critical" as the label. Holly has added "Showstopper-Cornell" as the label.</p>	
		Sharon	<p>Update from Nassib</p> <p>We'd like more discussion around LDP MARC querying and/or SRS MARC API Query: I'm concerned hearing even AnnMarie speak with rather non-committal language around LDP querying MARC on the current timeline</p> <p>https://issues.folio.org/browse/UXPROD-2791</p> <ul style="list-style-type: none"> He is hesitant to commit to a firm date due to (lack of) resources CUL should focus on pushing on UXPROD-2791 getting done 	
	Any other old business?			

	<p>New Business</p> <p>Debra</p>	<p>Contract is executed for https://issues.folio.org/browse/UXPROD-105 and https://issues.folio.org/browse/UXPROD-1407</p> <p>JFYI, Interviewing continues (plan to finish by the end of the week)</p> <ul style="list-style-type: none"> • 3 Back-end candidates (will select 2) <ul style="list-style-type: none"> • 1 Tech Team Lead from St. Petersburg, Russia • 1 Sr. Dev from Kharkiv, Ukraine • 1 Sr. Dev from Brest, Belarus • 1 Front-end candidate: 1 Sr Javascript developer from Kharkiv, Ukraine <p>Also, working with the Tech Lead (Dmytro Tkachenko) on the existing EPAM team (Spitfire) so that he can help with onboarding and provide some initial guidance.</p> <p>It is recommended for the Cornell PO's to start planning the team kick-off (we'll need to pick a date, probably middle January) and cover the following topics:</p> <ol style="list-style-type: none"> 1. Team Roles and Responsibilities 2. Discuss <ol style="list-style-type: none"> a. Process/Ceremonies, incl. Definition of Done <ol style="list-style-type: none"> i. Planning, grooming, retros ii. Meeting time(s) to accommodate for the difference in time zones iii. Demos (if needed) a. Tools (Jira, Confluence) b. Documentation expectations 1. Review Scope 1. Plan next steps <p>Notes:</p> <ul style="list-style-type: none"> • https://wiki.folio.org/display/COMMUNITY/Product+Owners 	
<p>Any new business?</p>		<p>Hearing feedback about resentment of implementing a new ILS during a global pandemic; called it "inhumane"</p> <p>Some folks were looking to take a long vacation this summer after the pandemic, and the implementation might make that impossible.</p> <ul style="list-style-type: none"> • Survey people on their feelings about this? <ul style="list-style-type: none"> • Might be worth talking to Gaby • Draft a response from us to share with CUL Leadership as a suggested way of responding? <ul style="list-style-type: none"> • Be more transparent about why we cannot change the date this time (since we have changed the date a couple of times in the past); share the finances around Voyager and FOLIO • Suggest that managers and leadership look at summer vacation time and have a plan to ease some of the mental burden on people • Early February mini-retreats for impacted supervisors/managers in Public Services; Jesse, Jean, Jason, Xin, Adam will coordinate LTS <ul style="list-style-type: none"> • Listen to concerns • Brainstorm ideas/suggestions 	

2021-01-11

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jesse, Frances, Andy, Jason, Nick, Huda, Jenn, Darcy, Ann

EBSCO: Anya, Molly

Regrets:

Discussion Items

Time	Item	Who	Notes	Action
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> FOLIO Friday - <ul style="list-style-type: none"> January 8: Training & Cutover debrief <div style="text-align: center; border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>How are you feeling about FOLIO go-live?</p> </div> <ul style="list-style-type: none"> February 12 <ul style="list-style-type: none"> Demos <ul style="list-style-type: none"> Here's how you check out a book Updates? <ul style="list-style-type: none"> Training Team 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 	
	Old Business	All	<p>Hearing feedback about resentment of implementing a new ILS during a global pandemic;</p> <ul style="list-style-type: none"> Feedback from Simeon Next Steps <ul style="list-style-type: none"> Who should be invited to February mini-retreat from Access Services? 	

		Debra	<ul style="list-style-type: none"> Showstoppers Project Update <ul style="list-style-type: none"> Contract is executed Dev Team Name: Scout <ul style="list-style-type: none"> This is in homage to Ithaca's aviation history! https://flyithaca.com/2018/02/history-aviation-ithaca-ithacas-relationship-aviation-dates-back-early-1900s/ Kickoff meeting scheduled for January 19 Establish a foundation of understanding of the project scope, work breakdown based on the user stories that are being completed the week of Jan 11th by Andy, Phil, and Holly <ul style="list-style-type: none"> https://issues.folio.org/browse/UICIRCLOG-22 - user story https://issues.folio.org/browse/UXPROD-2832 - Circ Log updates Snapshot: https://folio-snapshot.dev.folio.org/circulation-log (Login: diku_admin / admin) https://issues.folio.org/browse/UXPROD-2862 (Phil) - was https://issues.folio.org/browse/UXPROD-105 https://issues.folio.org/browse/UXPROD-2691 (Andy) - was https://issues.folio.org/browse/UXPROD-1407 <p>Question: Should we remove 105 and 1407 as showstoppers and add 2862 and 2691?</p>
Any other old business?			
New Business	Anya	EBSCO Updates	
		Jenn /Debra	<p>Optimistic Locking plan</p> <ul style="list-style-type: none"> EBSCO needs to flip a switch on Postgres and we can then monitor logs and see how big of an issue this is TEST instance Anya will follow up with their dev team
Any new business?	Jenn	<p>Please get folks who have been using TEST to play around moved to TRAINING</p> <p>Can we get some fake money in TRAINING instance?</p> <ul style="list-style-type: none"> Ann will add some 	

2021-01-25

Attendees

Sharon, Laura, Debra, Jean, Phil, Peter, Jesse, Frances, Jason, Nick, Huda, Jenn, Darcy, Ann

EBSCO: Anya, Patty

Regrets: Andy

Discussion Items

Time	Item	Who	Notes	Actions
	House keeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd FOLIO Friday <ul style="list-style-type: none"> Future FOLIO Fridays focus on demos Overview of FOLIO with Anya (reprise of Law demo) - February 12 Acquisitions demo with Dennis Bridges - March 12 Permissions sets and what people with these permissions can do? - April Access Services - May? Updates? <ul style="list-style-type: none"> FOLIO FORUM on February 17 at 11am: Getting Started with FOLIO Reporting 1.0: <ul style="list-style-type: none"> In March 2021, the FOLIO reporting community will release version 1.0 of a collection of reports and related queries that they have created to run on Library Data Platform (LDP) databases. This session will offer a practical introduction to the queries and how to build your own reports based on them. Areas covered will include metadata management, resource access, resource management, and work-in-progress on electronic resource management. 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jsps?selectPageId=11100 https://issues.folio.org/browse/UXPROD-2321 - I'd like to ask implementers to check your ranking on this (or rank it, if you have not yet done so.)TAMU recently found that OAI-PMH does not handle this scenario well (holdings with no items), and if you are planning on using OAI-PMH for your discovery layer, that may mean you want to rank this higher. <ul style="list-style-type: none"> We ranked this R4 Frances: this does not impact our Discovery, therefore we will not re-rank Sharon: this does not impact Reporting 	
	Old Business	Debra /Anya	<p>Implementers SIG discussion on Optimistic Locking proposal:</p> <p>https://wiki.folio.org/display/COHORT2019/2021-1-19+Meeting+Notes</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/RMB-777 Where/how do we see where these collisions take place? (logs) <ul style="list-style-type: none"> Honeysuckle? Iris? 	
	Any other old business?			
	New Business	Anya	<p>EBSCO Updates</p> <ul style="list-style-type: none"> Anya's team on Retreat February 3-4 <ul style="list-style-type: none"> Planning cutovers Re-kicking off the CUL Acquisitions Team this Wednesday 	
		Debra	<p>Impacts from May 3rd Iris release?</p> <ul style="list-style-type: none"> https://issues.folio.org/secure/Dashboard.jsps?selectPageId=11600 	

		Sharon	<p>Debra,</p> <p>I have noticed that several questions have come up about how/where Cornell will determine and document configuration settings, tags, statistical codes, and custom field settings in FOLIO applications. This will impact our documentation, training, and reporting. I would suggest we include this on the agenda for our implementation team meeting so we can begin planning how Cornell will do this.</p> <p>All the best,</p> <p>Sharon</p> <ul style="list-style-type: none"> • Where should we document this? <ul style="list-style-type: none"> • Centralized • LTS Trainers also talked about documenting naming conventions • Data dictionary? • Is there somewhere that these things are documented for Voyager? • Possibly start crowd-sourcing it on Training & Documentation Confluence 	
	Any new business?	Ann	Did first UAT testing and it worked! Going to try to do 3 rollovers a week.	

2021-02-01

Attendees

Sharon, Laura, Debra, Jean, Peter, Jesse, Frances, Jason, Nick, Huda, Jenn, Darcy, Ann, Andy

Regrets: Phil,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd FOLIO Friday <ul style="list-style-type: none"> Future FOLIO Fridays focus on demos Overview of FOLIO with Anya (reprise of Law demo) - February 12 Acquisitions demo with Dennis Bridges - March 12 Permissions sets and what people with these permissions can do? - April Access Services - May? FOLIO FORUM on February 17 at 11am: Getting Started with FOLIO Reporting 1.0: <ul style="list-style-type: none"> In March 2021, the FOLIO reporting community will release version 1.0 of a collection of reports and related queries that they have created to run on Library Data Platform (LDP) databases. This session will offer a practical introduction to the queries and how to build your own reports based on them. Areas covered will include metadata management, resource access, resource management, and work-in-progress on electronic resource management. LEG meeting: Communication <ul style="list-style-type: none"> Evolved to documentation and training Carla DeMello will be available to work on our Confluence site in a couple weeks (mid-Feb) <ul style="list-style-type: none"> Darcy to review UX/UI 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11100 	
	Old Business	Debra	<p>11 Showstoppers:</p> <ul style="list-style-type: none"> Current status: <ul style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-2802 - not in capacity plan <ul style="list-style-type: none"> In DRAFT - Harry is going to follow-up on this and a status report Per Harry: This will not make it into Iris Jenn says we'll be okay if the "lite" version makes it in: https://issues.folio.org/browse/UXPROD-2753 (see below) Changing this to R1 and removing "Showstopper" https://issues.folio.org/browse/UXPROD-1800 - RED <ul style="list-style-type: none"> Tracking to be in R1 2021 https://issues.folio.org/browse/UXPROD-2002 - RED <ul style="list-style-type: none"> Analysis Complete - Harry is going to follow-up on this and get a status report Per Harry: this is tracking to make it into Iris Per Laura: she has been tracking individual stories associated with this UXPORD, and they all have sprints assigned https://issues.folio.org/browse/UXPROD-2791 - not in capacity plan <ul style="list-style-type: none"> Jenn is PO Tracking to be in R1 2021 https://issues.folio.org/browse/UXPROD-1752 - Green <ul style="list-style-type: none"> Will be in R1 2021 https://issues.folio.org/browse/UXPROD-976 - YELLOW <ul style="list-style-type: none"> Will be in R1 2021 https://issues.folio.org/browse/UXPROD-2729 - white <ul style="list-style-type: none"> Tracking to be in R1 2021 https://issues.folio.org/browse/UXPROD-2753 - not in capacity plan <ul style="list-style-type: none"> Tracking to be in R1 2021 https://issues.folio.org/browse/UXPROD-1130 - Green <ul style="list-style-type: none"> Will be in R1 2021 https://issues.folio.org/browse/UXPROD-498 - Caiasoft <ul style="list-style-type: none"> Bombed last week Phil has re-engaged Caiasoft to do the integration directly for Cornell; we will share with Duke, and anyone else who needs it, after development https://issues.folio.org/browse/UXPROD-2691 - Circ Log export <ul style="list-style-type: none"> 4 weeks to complete https://issues.folio.org/browse/UXPROD-2862 - Fees fines to bursar <ul style="list-style-type: none"> 4 weeks to complete <p>UPDATE: Implementers SIG discussion on Optimistic Locking proposal: https://wiki.folio.org/display/COHORT2019/2021-1-19+Meeting+Notes</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/RMB-777 Where/how do we see where these collisions take place? (logs) <ul style="list-style-type: none"> Honeysuckle? Iris? 	

		Debra	UPDATE: Settings, Tags, Custom Fields, Naming Conventions	
	Any other old business?			
	New Business	Debra	<p>Communication Plan</p> <ul style="list-style-type: none"> • I will be sending weekly "FOLIO This Week" emails with info on what's happening in Training for that week • Is it possible for each lead to send me a few sentences about what's going on in their area as it pertains to CUL implementation? <ul style="list-style-type: none"> • Give updates at this meeting (standing agenda item) and I'll include in the weekly email after 	
	Any new business?			

2021-02-08

Attendees

Sharon, Laura, Debra, Jean, Peter, Jesse, Frances, Jason, Nick, Jenn, Ann, Andy, Phil,

EBSCO: Anya, Molly

Regrets: Huda (Attending virtual conference), Darcy

Discussion Items

Time	Item	Who	Notes	Actions
	House keepin g			
	Annou nceme nts		<ul style="list-style-type: none"> Iris release moved to May 3rd FOLIO Friday <ul style="list-style-type: none"> Future FOLIO Fridays focus on demos Overview of FOLIO with Anya (reprise of Law demo) - February 12 Acquisitions demo with Dennis Bridges - March 12 Permissions sets and what people with these permissions can do? - April Access Services - May? FOLIO FORUM on February 17 at 11am: Getting Started with FOLIO Reporting 1.0: <ul style="list-style-type: none"> In March 2021, the FOLIO reporting community will release version 1.0 of a collection of reports and related queries that they have created to run on Library Data Platform (LDP) databases. This session will offer a practical introduction to the queries and how to build your own reports based on them. Areas covered will include metadata management, resource access, resource management, and work-in-progress on electronic resource management. 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 Any updates for "FOLIO This Week" communication? <p>Brooks Travis Hello, all! I was wondering if the libraries who are implementing this summer could take a(nother) look at, and rank/re-rank, the following Requests features:</p> <p>https://issues.folio.org/browse/UXP-2649 (override "X requests are not allowed for this patron and item combination") https://issues.folio.org/browse/UXP-897 (revert an in-process request to "Open - not yet filled") https://issues.folio.org/browse/UXP-2690 (prevent local page requests) https://issues.folio.org/browse/UXP-2689 (Enable Request Policy to Determine Allowed Pickup Service Points) https://issues.folio.org/browse/UXP-2733 (Override non-requester checkout)</p>	
	Old Business			
	Any other old business?			
	New Business	Anya	<p>EBSCO Updates</p> <ul style="list-style-type: none"> Two-day retreat last week We will be upgraded to Iris by May 17th on all 3 instances 	
		Debra	<p>Communication request from Zsuzsa:</p> <p>This plan assumes a successful cutover. If it goes in a less than ideal way we would need to adjust communication. It would be great if we could plan for potential negative alternate scenarios, but for that I'd need to know what those might look like. If anyone has given this any thought from the technical and project point of view I'd love to confer.</p> <ul style="list-style-type: none"> Jesse, Anya, Jenn, Frances, Lenora S. 	

		Debra	<p>Email questions</p> <ul style="list-style-type: none"> Do you know when we'll be able to view order/pay records in Folio? Or is that not going to happen until July 1? I really miss not finding these in Voyager – I used to be able to search for my invoices by title to see how much/when my journals were paid for, and I can't do that easily anymore. 	Ann will follow up with Jill Powell
	Any new business?	Jesse	<p>PC charged a small group to propose a roadmap defining and review process</p> <ul style="list-style-type: none"> Jesse is convener Proposal due end of Feb. 	

2021-02-15

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Huda, Darcy

Regrets: Ann, Peter, Phil, Nick, Andy

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants by May 17th FOLIO Friday <ul style="list-style-type: none"> February Debrief: Overview of FOLIO with Anya (reprise of Law demo) March: Acquisitions demo with Dennis Bridges - March 12 April - Go-live/cutover plan update & Off-line circ demo - April 16 May - ideas? <ul style="list-style-type: none"> Access Services? ? Permissions sets and what people with these permissions can do? FOLIO FORUM on February 17 at 11am: Getting Started with FOLIO Reporting 1.0: <ul style="list-style-type: none"> In March 2021, the FOLIO reporting community will release version 1.0 of a collection of reports and related queries that they have created to run on Library Data Platform (LDP) databases. This session will offer a practical introduction to the queries and how to build your own reports based on them. Areas covered will include metadata management, resource access, resource management, and work-in-progress on electronic resource management. 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 Any updates for "FOLIO This Week" communication? <ul style="list-style-type: none"> Include OCLC demo 	
	Old Business	Debra	<p>Review proposed wireframe for Export Manager (could you please review comments in draft stories? would be nice to have you feedback before tomorrow):</p> <p>https://issues.folio.org/browse/UIEXPMGR-2 - to set up base three pane layout and navigation</p> <p>https://issues.folio.org/browse/UIEXPMGR-3 - Draft view export jobs results</p> <p>https://issues.folio.org/browse/UIEXPMGR-4 - Draft search and filters</p> <p>https://issues.folio.org/browse/UIEXPMGR-5 - Draft export job details</p> <ul style="list-style-type: none"> How many Circulation logs are expected to be generated in Cornell annually? It is fine to specify just magnitude - thousands, 10s thousands, millions, etc. Also, what is the expected annual growth? For how long the logs should be stored? Are any updates regarding what object storage should be used for Bursar? (AWS S3, MinIO, etc.). If no, when is better to reach you with this question again? Should Export manager page contain search panel and Job view tab (appears when a user clicks on a Job in the Export job table? See Pic. 2 here for more info: https://wiki.folio.org/display/DD/Export+Manager+UI+Wireframes) 	
	Any other old business?			
	New Business	Debra	<p>Support Issues:</p> <p>https://issues.folio.org/browse/UIU-2049 - Is this an issue for Cornell (we use Blacklight and SSO)?</p> <p>https://issues.folio.org/browse/SUP-30 - How would we like FOLIO to handle this?</p> <ul style="list-style-type: none"> The odd cent should go on one of the funds. I don't think it really matters to us which one. Maybe something like: <p>If using percentage distribution, and 100% total is entered, apply any remaining amount to the first fund. Right now Voyager rounds one up and one down.</p>	
		Debra	<p>Working with Zsuzsa and Rachel Fadlon (EBSCO) to create a success case study; possible blog posts; etc.</p> <p>Cool swag ideas for FOLIO EBSCO implementers?</p>	
		Debra /Andy	Access Services retreat debrief	
	Any new business?			

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2021-02-22

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Huda, Darcy, Ann, Peter, Phil, Nick, Andy

EBSCO: Anya,

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants by May 17th FOLIO Friday <ul style="list-style-type: none"> March: Acquisitions demo with Dennis Bridges - March 12 April - Go-live/cutover plan update & Off-line circ demo - April 16 May - ideas? <ul style="list-style-type: none"> Tools and integrations <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 Any updates for "FOLIO This Week" communication 	
	Old Business		Cool swag ideas for FOLIO EBSCO implementers? <ul style="list-style-type: none"> No pens, water bottles, or mugs We loved the honey - something you can use and get rid of A FOLIO puzzle FOLIO LEGO Stuffed animals...bees Pins 	
		Anya	EBSCO Updates <ul style="list-style-type: none"> None 	
	Any other old business?			
	New Business	All	IndexData OCLC Single Record Import demo thoughts? <ul style="list-style-type: none"> Jason sent a follow-up email to LTS folks who attended to clear up concerns from the Test instance being broken Jenn is digging into the community questions regarding overlay 	
		Debra	Who will be a PO and/or SIG convener for FY22? <ul style="list-style-type: none"> Debra: Support SIG Laura attempting to find someone to be the MM convener Jesse PC rep Sharon - Reporting? Jenn will PO her "little issue" 😊 	
		Debra	Should we create something for all of CUL like what LTS has: https://cornell.app.box.com/notes/771149642630 <ul style="list-style-type: none"> Debra to create and FAQ on the training page with a form submission for future comment/questions/concerns 	

	Any new business?			

2021-03-01

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Darcy, Ann, Peter, Phil, Nick, Andy

Regrets: Huda

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants by May 17th FOLIO Friday <ul style="list-style-type: none"> March: Acquisitions demo with Dennis Bridges - March 12 April - Go-live/cutover plan update & Off-line circ demo - April 16 May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11100 Any updates for "FOLIO This Week" communication <ul style="list-style-type: none"> Sharon's email Andy: <ul style="list-style-type: none"> Our FOLIO Access Services Training Manual is now up to 53 pages long, and we continue to add content weekly: https://docs.google.com/document/d/1of-vUqW3eveVWgDeBFkWuO3o9D4Hg020VGgQp6AbkQo/edit?ts=5ff4880e FOLIO Access Services Team Settings Group has agreed on a framework for circulation rules, and we are hoping to be writing them soon. Cammie Wyckoff is joining the UM SIG to represent access services. • FOLIO Access Services Team Training Group has completed a second FOLIO Tutorial and will release it soon. Training Group will begin working on a plan for formally training access services staff this week. • Training Group members are scheduling drop-in sessions for their colleagues, and have begun planning on scaling this up to include ALL access services staff. MAYBE: An Elimination of Fines proposal written by the Settings Group has now been discussed by the Access Services Team, DIB, and LDLT and sent to LEG for their review. MAYBE: Members of the Settings Group also met with CDExec to discuss replacement fees. Based on their recommendation, we are planning on raising our replacement fee for books for the first time in over 20 years from \$75 to \$150. 	
	Old Business			
	Any other old business?			
	New Business			
		Debra	<p>Capacity Planning Team Proposal for Planning Releases</p> <p>https://docs.google.com/document/d/1Meq8bZeZ5wpcy3Q9GB5DU21WoSMUp0AcZNUJ-vzVkw/edit</p>	
		Debra	Help completing the new FAQ: FAQ	
	Any new business?	Phil	<p>Alumni patron data in FOLIO. Specifically, will we need to include alumni in the nightly feed? And have we settled on the patron group to associate them with ("Alumni", presumably?)?</p> <ul style="list-style-type: none"> Andy: I ran this by Joanne Leary and Michelle Hubbell, and this is what they told me: "Alumni are just Library Card holders (if they want borrowing privileges – we don't give it to them automatically) – they aren't treated as a special patron group. Because they are given library-created patron records, they aren't updated in the patron feed." 	
		Phil	Integrations: https://cornell.app.box.com/file/428306937364	

2021-03-15

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Ann, Peter, Phil, Nick, Andy, Huda

Regrets: Darcy

Discussion Items

Time	Item	Who	Notes	Actions
	House keeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants by May 17th FOLIO Friday <ul style="list-style-type: none"> March: Acquisitions demo with Dennis Bridges - Debrief <ul style="list-style-type: none"> First drop-in results - send to Jean April - Go-live/cutover plan update & Off-line circ demo - April 16 <ul style="list-style-type: none"> Circle back to this after Access Services demo on March 17th FOLIO Governance model update - Jesse May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 Any updates for "FOLIO This Week" communication <ul style="list-style-type: none"> Training ops; scavenger hunt (8 responses so far) Formal training for Access Services will begin the week of April 19th; this will be followed up with unit specific training in May and June. Technical Services training will begin the week of March 22nd. Please see the Training Calendar for specifics. 	
	Old Business	Phil	<p>Integrations Updates: https://cornell.app.box.com/file/428306937364</p> <ul style="list-style-type: none"> BorrowDirect available Through field was missing from Z39.50 KFS - 2 teams from CIT will be working on this Scout's bursar file looks great ArchiveSpace - meeting last week; analysis is kicked off; Don Smith and Peter Martinez 	
	Any other old business?			
	New Business			
		Debra	<p>FOLIO-EBSCO case study sub-group volunteers?</p> <ul style="list-style-type: none"> Jesse, Jason 	
		Debra	<p>Help completing the new FAQ: FAQ</p> <p>Help completing the Glossary: Glossary of Terms</p>	
	Any new business?	Debra /Phil	<p>LDP Access: We met with CIT and EBSCO to solve the access to the LDP issue...and we did it! CIT will set up a virtualized environment to host DBEaver installations (one for the free version, one for licensed). CUL reporting users would double-click on an icon to run DBEaver without any special login requirements. The user groups would be managed in AD groups that will be delegated to CUL-IT to administer. We are targeting mid-April for a rollout, end of April at the latest.</p>	

2021-03-22

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Ann, Peter, Phil, Nick, Andy, Huda, Darcy

EBSCO: Anya

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants by May 17th FOLIO Friday <ul style="list-style-type: none"> April - Go-live/cutover plan update & Off-line circ demo - April 16 <ul style="list-style-type: none"> Circle back to this after Access Services demo on March 17th - Yes, include Postgres snapshot of Voyager update FOLIO Governance model update - Jesse May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagel=11100 Any updates for "FOLIO This Week" communication 	
	Old Business	Anya	<p>EBSCO Updates</p> <ul style="list-style-type: none"> Alex cleared out all the data in aqu in the test tenant - waiting for new data from Joe All Inventory items should be loaded 	
		Debra	<p>Showstoppers:</p> <ol style="list-style-type: none"> UXPROD-2909 - CLOSED UXPROD-2910 - CLOSED UXPROD-2911 - CLOSED https://issues.folio.org/browse/UXPROD-1800 - IN REVIEW? Anyone know the status? https://issues.folio.org/browse/UXPROD-1752 - DRAFT? Anyone know the status? <ol style="list-style-type: none"> Since https://issues.folio.org/browse/UXPROD-1752 is the only piece of optimistic locking that will be included in Iris, I'm am leaving that as our showstopper and removing https://issues.folio.org/browse/UXPROD-2796, https://issues.folio.org/browse/UXPROD-2798, and https://issues.folio.org/browse/UXPROD-2797 as showstoppers but leaving them as R1. 1752 will give us logging so we can see if a collision occurred and fix it; it will also allow us to see how big of a problem this is. Other implemented libraries are saying it's not really a problem. 	
		Anya/All	<p>Cutover Team Planning - updates</p> <p>How are we going to check in with people after go live?</p> <ul style="list-style-type: none"> Open Zoom "support desk" for a couple days or up through the first week <ul style="list-style-type: none"> Not highly used at Michigan, but they liked having it available About 1 person a day used it cul-folio Slack Desktop Services (Amy) - help requests and in person Designated people identified to "stand-by" and respond 	
	Any other old businesses?			
	New Business	Debra	<p>100 Points Ranking: https://wiki.folio.org/display/COMMUNITY/FOLIO+Feature+Prioritization</p> <p>What will our process be?</p> <ul style="list-style-type: none"> Review internally by Epic Jesse - it would be great if we could end up with 10-15 that we give points to Jesse - dig up our knarly workarounds 	

		Holly Update	<p>Last week we discovered an Inventory feature (transfer of holdings and items) that was originally thin-threaded (to exclude dependency checks) has been corrupting data. This was reported by Chicago, but is happening to others as well. For some reason the complete feature was never given a high priority or identified as a "showstopper" for Chicago. Now we have to do something before Chicago goes live with FOLIO. We don't know what technical approach to take, so Kelly Drake (the new FOLIO PO Lead) is working with the FOLIO Technical Council to get help in deciding what the best approach would be. We will also be presenting this issue to the Capacity Planning Team on March 22, because we need help in determining who will do the work and how it will get released by July 1. Unfortunately the fix will impact a bunch of apps (Requests, Loans, Orders, Courses, Fee/Fines and Patron Notices). I have been expecting issues like this to pop-up as we get closer to the July implementations, but hopefully they won't all be so difficult to resolve.</p> <ul style="list-style-type: none"> • https://issues.folio.org/browse/UXPROD-1647 • Jesse will let Debra know the impact by close of business Wednesday to inform Kelly Drake 	
	Any new businesses?	Laura /Debra	<p>https://wiki.folio.org/display/FOLIOtips/Alternatives+for+Features+Still+In+Development</p> <ul style="list-style-type: none"> • Do any of these concern us? • Or, share workarounds that we have created 	
		Jesse	<p>Resource Access usability testing</p> <ul style="list-style-type: none"> • List of tasks to test • Huda is working on this with Jesse • CUL usability working group partnered • Jean - can Law Library people participate in testing? <ul style="list-style-type: none"> • Jesse says yes 	

2021-03-29

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Ann, Peter, Phil, Nick, Andy, Huda, Darcy

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants the week of May 17th FOLIO Friday <ul style="list-style-type: none"> April - Go-live/cutover plan update & Off-line circ demo - April 16 <ul style="list-style-type: none"> Circle back to this after Access Services demo on March 17th - Yes, include Postgres snapshot of Voyager update FOLIO Governance model update - Jesse May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100 Any updates for "FOLIO This Week" communication 	
	Old Business			

	Debra	<p>Showstoppers:</p> <ol style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-1800 - IN REVIEW <ol style="list-style-type: none"> From PO Khalilah Gambrel: the backend is ready. I need to confirm with EBSCO - EDS team on enabling this capability. <p>Bug Fest:</p> <p>Dear POs, R1 2021 Iris release is keep on moving forward. I deeply appreciate all your efforts that you continue to put into the release. 12 brand new modules will be firstly represented:</p> <ul style="list-style-type: none"> mod-graphql mod-copycat edge-connexion edge-dematic ui-inventory-es mod-search ui-plugin-bursar-export ui-export-manager mod-data-export-spring mod-data-export-worker mod-remote-storage <p>ui-remote-storage All initial R1 2021 releases has been done on time. Now EBSCO FSE team is working on Iris bugfest environment preparation. Here is bugfest environment preparation plan - https://wiki.folio.org/display/REL/Iris+%28R1+2021%29+Bugfest+environment+preparation+plan. We are going to start Iris bugfest according to plan at Monday, March 29 but with next exception:</p> <p>At Monday, March 29 bugfest will be started with migrated modules (which are represented at Q3 2020 Honeysuckle) At next Monday, April, 5 all newly models will be available for testing at Iris bugfest as well</p> <p>Please plan your work accordingly.</p> <p>Bug Fest: March 29 - April 9 - Test Showstoppers:</p> <ol style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-2729 - Allow Recalls to Extend Due Dates on Overdue Loans (Configurable) <ol style="list-style-type: none"> Andy https://issues.folio.org/browse/UXPROD-976 - Import individual MARC record from OCLC within Inventory <ol style="list-style-type: none"> Laura, Jason https://issues.folio.org/browse/UXPROD-2691 - Circulation log export to CSV <ol style="list-style-type: none"> Andy https://issues.folio.org/browse/UXPROD-2862 - Cornell Library's go-live requirements to transfer fees/fines to the Cornell bursar system <ol style="list-style-type: none"> Phil https://issues.folio.org/browse/UXPROD-1800 - Patron Comments on Request <ol style="list-style-type: none"> Andy https://issues.folio.org/browse/UXPROD-1752 - Prevent update conflicts (via optimistic locking): platform support for detection <ol style="list-style-type: none"> Anya https://issues.folio.org/browse/UXPROD-2791 - SRS MARC Query API <ol style="list-style-type: none"> Jenn https://issues.folio.org/browse/UXPROD-2002 - Implement Normalized Call Number for Sorting (LoC Parsing Only) <ol style="list-style-type: none"> Laura, Sharon https://issues.folio.org/browse/UXPROD-2753 - Data Import Log - "lite version" <ol style="list-style-type: none"> Nick Jenn says they have already reported some bugs that will not be fixed until next week https://issues.folio.org/browse/UXPROD-498 - Remote Storage Integration Module (Caiasoft) <ol style="list-style-type: none"> Phil <p>Closed Showstoppers - do we need to test?</p> <ol style="list-style-type: none"> UXPROD-2909 - CLOSED - Override at check out for patron and item blocks UXPROD-2910 - CLOSED - Override of request for patron blocks UXPROD-2911 - CLOSED - Override at renewal for patron and item blocks 	
	Debra	<p>100 Points Ranking: https://wiki.folio.org/display/COMMUNITY/FOLIO+Feature+Prioritization</p> <p>Update: this process will begin April 12th and last for 3 weeks</p> <p>Hi POs! The new pointing process for selecting the most critical features to work on will be held April 12-30. I will need to create the "ballot" (list of JIRA UXPRODs) on April 9 (the Friday before). Please have your UXPRODs in shape by April 9 at 9:00 AM US EST. Thanks...</p> <p>P.S. This includes closing the Iris features that are done and making sure that "R2 2021" appears in the <i>Fix Version</i> for features planned for Juniper.</p> <p>What will our process be?</p> <ul style="list-style-type: none"> Review internally by Epic Jesse - it would be great if we could end up with 10-15 that we give points to Jesse - dig up our knarly workarounds 	
	Jesse	<p>Update:</p> <p>Last week we discovered an Inventory feature (transfer of holdings and items) that was originally thin-threaded (to exclude dependency checks) has been corrupting data. This was reported by Chicago, but is happening to others as well. For some reason the complete feature was never given a high priority or identified as a "showstopper" for Chicago. Now we have to do something before Chicago goes live with FOLIO. We don't know what technical approach to take, so Kelly Drake (the new FOLIO PO Lead) is working with the FOLIO Technical Council to get help in deciding what the best approach would be. We will also be presenting this issue to the Capacity Planning Team on March 22, because we need help in determining who will do the work and how it will get released by July 1. Unfortunately the fix will impact a bunch of apps (Requests, Loans, Orders, Courses, Fee/Fines and Patron Notices). I have been expecting issues like this to pop-up as we get closer to the July implementations, but hopefully they won't all be so difficult to resolve.</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-1647 Laura: we may need to use permissions to limit who can transfer holdings and items to check data after the move Darcy: Patron notices are not really affected; orders and courses are definitely affected Per Dennis: big feature to work on for R2 	
	Debra	<p>Reminder: this page was created: Settings, Tags, Custom Fields, Naming Conventions</p>	
	Debra	<p>Cutover plan details: https://docs.google.com/spreadsheets/d/1Tch-1FvFcA51NQnr_dmGlaWSJeLvQAxDDA33KcZZTtW/edit#gid=1298983013</p> <ul style="list-style-type: none"> Off-line circ is not suitable for 10 days Circulation desks will be closed for 1 week before go-live - June 21 Emergency services plan - Andy 	
Any other old business?			

	New Business	Debra	Holly: Our team is still suffering from a lack of Product Owners to provide feature user stories. I don't see this changing until the community donates more POs, or implemented sites complain about the lack of work on core modules such as loans, requests, check-in, check-out, etc.	
		Debra	FOLIO never logs off https://issues.folio.org/browse/FOLIO-2556	
	Any new business?	Phil	I created a "System" service point with a warning not to delete it, in the Cornell test environment cornell-test.folio.ebsco.com .	
		Jesse	Product Council: <ul style="list-style-type: none"> • Roadmap Process • May - PC and Tech Council elections; PC will contract and Tech will expand • All of PC Exec were elected to Community Council, so Jesse is co-chairing PC through elections 	

2021-04-19

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Ann, Peter, Phil, Nick, Huda, Darcy, Andy

EBSCO:

Regrets: Anya

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants the week of May 17th FOLIO Friday <ul style="list-style-type: none"> April - Go-live/cutover plan update, Voyager snapshot, governance update, & Off-line circ demo - DEBRIEF <ul style="list-style-type: none"> 45 people in attendance - a lot lower than previous sessions May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa AND/OR what will be available at go-live and what won't 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPageId=11100 Any updates for "FOLIO This Week" communication 	
	Old Business	Anya	EBSCO Updates	
		Jean /Laura /Jenn	<p>From last week:</p> <p>Item records issue:</p> <p>When ordering something in the Orders app, the operator has the option of creating an item record for the thing being ordered or not. In Voyager, we don't create item records at the point of order, but Voyager automatically creates a statement in the holdings record that says "On order" when you create a purchase order. In FOLIO, unless you DO create the item record at the point of order, there's no real way to tell that something is on order without taking additional steps. Also, if there is no item record associated with something that is on order, a patron cannot request it (as far as I am aware).</p> <p>If you DO create the item record at the point of order, the item record displays in Inventory as being "On order." When the material is received in the Receiving app, the existing item record status is automatically changed from "On order" to "In process" (see below), which is fine as far as it goes.</p> <p>Our concern stems from the fact that when we are cataloging something and it is ready to send to the stacks, there is no way for catalogers to edit the Item status to change it from "In process" to "Available." This can only be done by someone with access to the Check In app (i.e., people who work in Access Services). We want to bring this concern to the attention of Access Services (in case they are unaware of the situation) and figure out how to handle this within our departmental workflows.</p>	When the cataloger finishes cataloguing the item, they will put a statistical code on that we'll run a script and "check in"
		Debra	Review the ranking spreadsheet: https://cornell.app.box.com/file/798579574419	
	Any other old businesses?			
	New Business			
	Any new businesses?			

2021-04-26

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jason, Jenn, Ann, Peter, Phil, Nick, Darcy, Andy

Regrets: Huda

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants the week of May 17th FOLIO Friday <ul style="list-style-type: none"> May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa AND/OR what will be available at go-live and what won't 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100 Any updates for "FOLIO This Week" communication 	
	Old Business	Debra	Review the ranking spreadsheet: https://cornell.app.box.com/file/798579574419 Duke: https://docs.google.com/spreadsheets/d/1meH7vJRiNkDyUzXm-Zu7vwDTds9HaaTZkzRedtf4kfU/edit?usp=sharing <ul style="list-style-type: none"> We have UXPRODs 120, 2200, 2062, and 2453 in common with Duke Chicago: https://docs.google.com/spreadsheets/d/1iaf9xuOnBvGgf54gUndHkzQjVG4qMQwgqhOk_RqtYI/edit#gid=0 <ul style="list-style-type: none"> We have UXPROD 120 in common with Chicago Stanford has about 67; Alabama 70 - DRAFT The "ballot" currently has 57 libraries listed to vote.	Debra to add to official ballot
	Any other old business?			
	New Business	Andy	Testing <ul style="list-style-type: none"> Jenn: https://issues.folio.org/browse/CIRC-1121 is what I was wondering about Darcy: I was primarily interested in prioritizing some notice processing performance testing... Create a Testing group to come up with list of things we want to performance test after we have Iris <ul style="list-style-type: none"> Andy, Jenn, Nick, Ann, Sharon recommendation, Jean rep, Phil, Acqu rep (Jesse) 	Sub-group will be formed and scheduled
		Debra	Iris Release Notes: https://wiki.folio.org/display/REL/R1+2021+%28Iris%29+Release+Notes	
	Any new business?			

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2021-05-10

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jenn, Ann, Phil, Nick, Darcy, Andy, Huda

Regrets: Jason, Peter,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants the week of May 17th - done by the 21st. <ul style="list-style-type: none"> EBSCO will be taking a snapshot of our FOLIO PROD database tomorrow morning, May 11th, at 8am EST. The dry run environment for Iris testing will be available by the end of day on Wednesday, May 12th. During this time, you can continue to work. I will notify you when scheduled downtime will occur for the upgrade. This will be based on successful testing of Iris. June 4th - Hot Fix #1 will applied FOLIO Friday <ul style="list-style-type: none"> May - Tools and integrations - Nick, Jenn, Phil <ul style="list-style-type: none"> Nick & Jenn LTS Workflows: "As to whether these tools are interesting to a broader audience, I think this could be applicable if Jenn and I can conceptualize a demo focusing on the fact that the batch processing team will continue to rock in a FOLIO world, rather than on the underlying tech." June - What can FOLIO do that Voyager can't and vice versa AND/OR what will be available at go-live and what won't <ul style="list-style-type: none"> Add: how to get support 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagel=11100 Any updates for "FOLIO This Week" communication 	
	Old Business	All	<p>Testing</p> <ul style="list-style-type: none"> Create a Testing group to come up with list of things we want to performance test after we have Iris <ul style="list-style-type: none"> Andy, Jenn, Nick, Ann, Sharon recommendation, Jackie Magagnosc, Phil, Acqu rep (Jesse) 	Update on membership?
		Debra	<ul style="list-style-type: none"> Pointing results for Kiwi: Quite a bit of unhappy talk about the top priorities possibly not being included because they are "umbrella" UXPRODs Our results <ul style="list-style-type: none"> https://wiki.folio.org/display/COMMUNITY/Pointing+Results+for+Kiwi+Release <ul style="list-style-type: none"> https://issues.folio.org/browse/UXPROD-120 (20) - #1 https://issues.folio.org/browse/UXPROD-2350 (10) - not in Top 20 https://issues.folio.org/browse/UXPROD-2062 (10) - not in Top 20 https://issues.folio.org/browse/UXPROD-2252 (10) - not in Top 20 https://issues.folio.org/browse/UXPROD-531 (10) - #8 https://issues.folio.org/browse/UXPROD-2994 (10) - not in Top 20 https://issues.folio.org/browse/UXPROD-3000 (5) - not in Top 20 https://issues.folio.org/browse/UXPROD-2200 (5) - #7 https://issues.folio.org/browse/UXPROD-1726 (5) - not in Top 20 https://issues.folio.org/browse/UXPROD-2453 (5) - not in Top 20 https://issues.folio.org/browse/UXPROD-1625 (5) - not in Top 20 https://issues.folio.org/browse/UXPROD-2843 (5) - not in Top 20 	
	Any other old business?			
	New Business	Debra	<p>Implementation Team after "go-live"</p> <ul style="list-style-type: none"> Schedule weekly through the end of the calendar year 	
		Andy	Re-review R1 rankings to see if they are accurate	
	Any new business?			

2021-05-17

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jenn, Ann, Peter, Phil, Nick, Darcy, Andy, Huda, Jason

Regrets: Anya

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Iris release moved to May 3rd; Cornell will be upgraded on all 3 tenants the week of May 17th - done by the 21st. June 4th - Hot Fix #1 will applied FOLIO Friday <ul style="list-style-type: none"> May 14 - Tools and integrations - DEBRIEF June 11 - What can FOLIO do that Voyager can't and vice versa AND/OR what will be available at go-live and what won't - Low effort round robin - ALL <ul style="list-style-type: none"> Add: how to get support & CUL governance - Debra Timeline / go-live update - Debra 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100 Any updates for "FOLIO This Week" communication 	
	Old Business	All	Testing <ul style="list-style-type: none"> Create a Testing group to come up with list of things we want to performance test after we have Iris <ul style="list-style-type: none"> Andy, Jenn, Nick, Ann, Sharon, Jackie Magagnosc , Phil, Lisa Maybury Jenn will coordinate 	Update on membership?
		Anya (Debra)	EBSCO Updates	
	Any other old business?			
	New Business	Support	Dashboard: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11117	
	Any new business?			

2021-05-24

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jenn, Ann, Peter, Phil, Nick, Darcy, Andy, Huda, Jason

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> June 4th - Hot Fix #1 will applied FOLIO Friday <ul style="list-style-type: none"> June 11 - What can FOLIO do that Voyager can't and vice versa AND/OR what will be available at go-live and what won't - Low effort round robin - ALL <ul style="list-style-type: none"> Add: how to get support & CUL governance - Debra Timeline / go-live update - Debra 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11117 	
	Old Business	Debra	Iris upgrades done These are outstanding items for Cornell Test and Training and the relative times when they will be done: <ul style="list-style-type: none"> Stream logs from their test/training(what they had in Honeysuckle) for their Iris env also - is being worked on by Bill - In Progress LDP hookup - will be worked on by Bill in this iteration(05/24 - 06/04) Run script on their test env which will take 5+ hrs for a Juniper feature - moved to next iteration(06/07 - 06/18) <ul style="list-style-type: none"> We need this to be closer to the 7th than the 18th, because Nick is trying to build data import jobs and integrations 	
		Debra	Is anyone waiting on something from me?	
	Any other old business?			
	New Business	Debra /Jenn	Data import issues <ul style="list-style-type: none"> https://issues.folio.org/browse/MODDSCORE-143 Debra, Jenn, Nick, and Simeon meeting with Harry, Mark, and Anya this week 	
		Debra	FOLIO celebration ideas <ul style="list-style-type: none"> Implementation Team <ul style="list-style-type: none"> Team celebration All CUL <ul style="list-style-type: none"> September? In person/hybrid? Multiple sessions if necessary if group size is still limited - maybe focus on functional areas Outside if possible - sneak into a Homecoming tent; balcony or Memorial Room Willard Straight; Big Red Barn Appies and Cake LEG speakers - thank STAFF <ul style="list-style-type: none"> Especially noting staff who have had to relearn their jobs Swag: Cute little Bee t-shirts 	
	Any new business?			

2021-06-07

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jenn, Ann, Peter, Phil, Nick, Andy, Huda, Jason

Regrets: Darcy

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> FOLIO Friday <ul style="list-style-type: none"> June 11 - What can FOLIO do that Voyager can't and vice versa AND/OR what will be available at go-live and what won't - Low effort round robin - ALL <ul style="list-style-type: none"> Add: how to get support & CUL governance - Debra Timeline / go-live update - Debra 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11117 	
	Old Business	Debra	From Anya - Settings <ul style="list-style-type: none"> Do we approve Setting as they are in Test to be copied to Prod? <ul style="list-style-type: none"> Later in the week 	
		Jenn	Testing Team update <ul style="list-style-type: none"> Testing plans being collected in CUL FOLIO Implementation Box Test begins on Thursday, June 10 - 18 <ul style="list-style-type: none"> Two tests: 1 dispersed, 1 everyone all together (June 10) 	
	Any other old business?			
	New Business	Debra	Hot Fix 1 is applied. 4 bugs: <ul style="list-style-type: none"> quickMARC Latency: quickMARC updates are not reflected on Inventory instance record https://issues.folio.org/browse/MODQM-119 quickMARC Latency: Unable to view source, edit or derive MARC bib without a page refresh or new search https://issues.folio.org/browse/MODQM-118 MARC bib record does not update when overlay applied https://issues.folio.org/browse/MODQM-120 After editing with quickmarc data import marc updates are erroneously discarded https://issues.folio.org/browse/MODDATAIMP-452 DI creating duplicates, it is supposed to be in HF2 but no one is assigned to it yet: https://issues.folio.org/browse/MODDATAIMP-440 Hot Fix 2 will be applied before we go live.	
		Debra	Update for LEG - anything you want specifically included?	
	Any new business?			

2021-06-14

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jenn, Ann, Peter, Phil, Nick, Andy, Huda, Jason, Darcy

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> FOLIO Friday debrief <ul style="list-style-type: none"> Should there be a July FOLIO Friday? No Juniper Bug Fest June 28 - July 9 Juniper Release August 2 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagel=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspa?selectPagel=11117 	
	Old Business			
		Jenn	Testing Team update <ul style="list-style-type: none"> Testing plans being collected in CUL FOLIO Implementation Box Test begins on Thursday, June 10 - 18 <ul style="list-style-type: none"> Two tests: 1 dispersed, 1 everyone all together (June 10) Did NOT go well; EBSCO tweaked performance variables on Test, and Jenn and Team re-ran a test on Friday afternoon. This went much better! EBSCO did additional tweaks to Test; full re-test is Monday, June 14 	
		Debra	LEG has approved continuing with July 1 go-live Hot Fix 3 (and possible additional hot fixes) being planned for Iris	
	Any other old businesses?			
	New Business	Debra	Update from Holly re: Kiwi: <ul style="list-style-type: none"> We have started planning the work for the Kiwi (R3 2021) release. <ul style="list-style-type: none"> Most of the highly pointed features don't have requirements yet, and involve architectural changes and multiple teams /product owners. This means that the product owners have a lot of work to do before the devs can start working on them. Given this, it is unlikely that even the highest pointed stories will be completed in the Kiwi (R3 2021) release, but at least we are getting them going. The Product Owners are being pulled in many directions. We are being pressured to deal with tech debt, but also to fix all bugs and develop features. It is impossible to do all of that at once. At Wednesday's Product Owner meeting we discussed what to do about this situation. We are recommending that the Kiwi (R3 2021) release focus on tech debt (primarily developing tests) and critical bugs. While the devs are focused on that, the Product Owners will be working on the requirements for the top rated features (as described in the previous bullet). We are anticipating disappointment from the implemented/implementing sites, but we cannot continue accumulating tech debt. Not having the appropriate automated tests in place is a big part of why it takes us so long to get a release out (it takes us 4 weeks to do BugFest testing and fix all the bugs, many of which are regressions). The Product Council has charged us to make FOLIO stable, and this is what we are doing. Some features will be completed because there are teams that don't have as much tech debt as others. My teams (UNAM and Prokopovych) have a lot of tech debt. 	
	Any new businesses?			

2021-06-21

Attendees

Sharon, Laura, Debra, Jean, Jesse, Frances, Jenn, Ann, Peter, Phil, Nick, Andy, Huda, Jason, Darcy

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> July 9 FOLIO Friday <ul style="list-style-type: none"> From Training Team: Keep this date and use it for Q&A like "I've been trying FOLIO for a week, and I have questions!" Juniper Bug Fest June 28 - July 9 Juniper Release August 2 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPagel=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspx?selectPagel=11117 	
	Old Business		<p>Open Bugs:</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/EDGPATRON-49 - Patron Comments- Not seeing comments in response OR on FOLIO request record when user creates request via opac or discovery - this is a bug from our Showstopper https://issues.folio.org/browse/UXPROD-1800 https://issues.folio.org/browse/MODPATRON-59 - Account lookup fails if patron has fees/finest without item info - did not make it into Hot Fix 2 https://issues.folio.org/browse/EDGPATRON-43 - Account lookup returns wrong accrual date for fines/fees - did not make it into Hot Fix 2 https://issues.folio.org/browse/MODDATAIMP-440 - Data Import job is creating duplicate records with or without any background activity - did not make it into Hot Fix 2 https://issues.folio.org/browse/MODSOURMAN-494 - The status of SRS records changes in the log display based on later data import jobs - listed for Hot Fix 3 / Juniper <p>Loose Bug:</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/UIIN-1537 - did not make it into Hot Fix 2 <ul style="list-style-type: none"> quickMARC Latency: quickMARC updates are not reflected on Inventory instance record Cannot reproduce; investigating further for Juniper <p>Bugs Fixed in Hot Fix 2</p> <ul style="list-style-type: none"> https://issues.folio.org/browse/UIIN-1532 - quickMARC Latency: Unable to view source, edit or derive MARC bib without a page refresh or new search - Hot Fix 2 https://issues.folio.org/browse/MODCPCT-49 - MARC bib record does not update when overlay applied - CLOSED <ul style="list-style-type: none"> Addressed with https://issues.folio.org/browse/MODQM-122 and https://issues.folio.org/browse/MODSOURCE-318 - Hot Fix 2 https://issues.folio.org/browse/MODQM-122 - After editing with quickmarc data import marc updates are erroneously discarded - Hot Fix 2 	
	Any other old business?			
	New Business	All	<p>9 days before go-live: what is the status of your area / what do you have left to do?</p> <ul style="list-style-type: none"> Integrations <ul style="list-style-type: none"> BorrowDirect testing can resume Data migration <ul style="list-style-type: none"> Bibs and Holdings are in Prod; Items are next Testing / Training TS Workflows <ul style="list-style-type: none"> Fingers crossed for Hot Fix 2 success Access Services <ul style="list-style-type: none"> Concerns about check-in/check-out times Finance - Ann <ul style="list-style-type: none"> Closing Voyager All Funds in FOLIO Prod Reporting <ul style="list-style-type: none"> Virtual dBeaver set up Training will be scheduled after multiple user slowdown issue is solved D&A <ul style="list-style-type: none"> Working on setting up Prod SOLR index 	

	Any new business?			

2021-06-28

Attendees

Sharon, Laura, Debra, Jean, Jesse, Jenn, Ann, Peter, Phil, Nick, Andy, Huda, Jason, Darcy

Regrets: Frances

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> July 9 FOLIO Friday <ul style="list-style-type: none"> From Training Team: Keep this date and use it for Q&A like "I've been trying FOLIO for a week, and I have questions!" Juniper Bug Fest June 30 - July 9 Juniper Release August 2 CUL FOLIO Governance Committee had their kick-off meeting 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11117 	
	Old Business			
	Any other old business?			
	New Business	Jesse	PROD Performance <ul style="list-style-type: none"> Last Monday's PROD downtime/update increased CPU time, memory, and put checks in place to alert EBSCO hosting to any denigration in circulation performance. 	
		Debra	Communication: <p>Will there be anything impacting patrons that Zsuzsa needs to get communicated?</p> <ul style="list-style-type: none"> Blacklight / newcatalog status? <p>Anything re: go-live that Simeon needs to communicate to LEG on Wednesday?</p> <ul style="list-style-type: none"> Reporting: missing some MARC functionality in LDP; testing Tuesday and Wednesday <ul style="list-style-type: none"> None of the Day 1 reports are impacted by the MARC issue All of the must be available Day 1 reports will be available (6 high priority reports not available) <p>Any specific reminders/info that I need to communicate to staff before go-live?</p> <ul style="list-style-type: none"> Prod link: https://cornell.folio.ebsco.com/ Need to assign a service point 	
			Go-live approval: <ul style="list-style-type: none"> Ann announces funds are ready <ul style="list-style-type: none"> Need Judy to approve the budget; she is supposed to approve the 29th Ann anticipates funds and expense classes will be done by the end of the day tomorrow We need a feed to KFS. Will be integrated the 29th and tested. Phil working with CIT. 	
	Any new business?			

2021-07-12

Attendees

Sharon, Debra, Jean, Jesse, Jenn, Ann, Peter, Phil, Andy, Huda, Jason, Darcy, Frances

EBSCO: Anya

Regrets: Nick, Laura,

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> July 9 FOLIO Friday <ul style="list-style-type: none"> From Training Team: Keep this date and use it for Q&A like "I've been trying FOLIO for a week, and I have questions!" Juniper Bug Fest July 12 - July 23 Iris Hot Fix 3 July 23rd Juniper Release delayed until August 16 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jsps?selectPagelD=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jsps?selectPagelD=11117 	
	Old Business			
	Any other old business?			
	New Business	Debra	Known Issues & Statuses	
	Any new business?			

2021-07-19

Attendees

Sharon, Debra, Jean, Jesse, Jenn, Peter, Phil, Andy, Huda, Jason, Darcy, Frances, Nick, Laura,

Regrets: Ann

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none">• Juniper Bug Fest July 12 - July 23• Iris Hot Fix 3 July 23rd• Juniper Release delayed until August 16	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none">• Unranked items: https://issues.folio.org/secure/Dashboard.jsps?selectPageId=11100• Support Dashboard: https://issues.folio.org/secure/Dashboard.jsps?selectPageId=11117	
	Old Business			
	Any other old business?			
	New Business	Debra	Known Issues & Statuses	
	Any new business?			

2021-08-02

Attendees

Sharon, Debra, Jean, Jenn, Peter, Phil, Andy, Huda, Darcy, Frances, Nick, Laura, Ann

Regrets: Jesse, Jason,

EBSCO: Anya

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Juniper Release delayed until August 16 Hot Fix 4 - unknown timing 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspa?selectPagelD=11117 	
	Old Business	Debra	Known Issues & Statuses <ul style="list-style-type: none"> Can someone test this? <ul style="list-style-type: none"> https://issues.folio.org/browse/ZF-52 - Phil email Jenn, Laura, Cammie and Caitlin requesting test on Prod 	
	Any other old business?			
	New Business	Debra	FOLIO Feedback <ul style="list-style-type: none"> Survey? <ul style="list-style-type: none"> Are we missing anything? Issues? Things not working? What gaps? Training needs? Is there anything you need to do that you don't know how to do? Are you missing anything that you need to do your job? Gaby or Zsuzsa? Timing? <ul style="list-style-type: none"> After Juniper - late September 	
		Debra	Load Test before the fall term starts <ul style="list-style-type: none"> We do not like this idea; will throw off reporting if we do it in PROD; too many logistics Partner with EBSCO 	
		Debra	Governance: Roles & Responsibilities doc	
	Any new business?			

2021-08-09

Attendees

Sharon, Debra, Jean, Jenn, Peter, Phil, Andy, Huda, Darcy, Frances, Nick, Laura, Ann, Jesse, Jason

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<ul style="list-style-type: none"> Juniper Release delayed until August 16 Hot Fix 4 - unknown timing 	
	Action items from last meeting		OPEN ACTION ITEMS <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspx?selectPageId=11117 	
	Old Business	Debra	Known Issues & Statuses	
	Any other old business?			
	New Business			
	Any new business?			

2021-09-20

Attendees

Sharon, Debra, Jean, Jenn, Peter, Phil, Andy, Darcy, Frances, Nick, Laura, Ann, Jesse, Jason

Regrets: Huda

Discussion Items

Time	Item	Who	Notes	Actions
	Housekeeping			
	Announcements		<p>Our original schedule for the FOLIO Juniper upgrades has been delayed due to an issue that was discovered that is blocking the upgrade. I do not have updated dates yet, and I will post an update to this update as soon as I have additional information. Juniper Upgrade Schedule</p> <ul style="list-style-type: none"> Both TEST and TRAINING will be upgraded between 9/13 and 9/17. During this upgrade, we will also mirror Prod data and settings to Test and Training and apply Hot Fix 2 <ul style="list-style-type: none"> Update: Snapshot for Cornell dry run, test, and training taken at 5:21PM EST 09/13 The dry-run for PROD will also be created 9/13 and 9/17 <ul style="list-style-type: none"> Update: Delayed due to block - https://issues.folio.org/browse/MODORDSTOR-248 Testing of the upgrade on PROD dry-run is slated for 9/20-9/24 <ul style="list-style-type: none"> Update: Delayed due to block - https://issues.folio.org/browse/MODORDSTOR-248 Provided testing goes as we expect, our PROD upgrade is scheduled for 9/27-10/1 (including Hot Fix 2) 	
	Action items from last meeting		<p>OPEN ACTION ITEMS</p> <ul style="list-style-type: none"> Unranked items: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11100 Support Dashboard: https://issues.folio.org/secure/Dashboard.jspa?selectPagelId=11117 	
	Old Business	Debra	Known Issues & Statuses	
		Debra	Governance: Roles & Responsibilities doc review	
		Debra	Survey - in progress with Gaby's team; will be sent out mid to late October depending on Juniper upgrades	
	Any other old business?			
	New Business	Debra	<p>November 2021 FOLIO Friday</p> <ul style="list-style-type: none"> Status after Juniper What's coming in Kiwi Survey outcomes <p>January 2022 FOLIO Friday</p> <ul style="list-style-type: none"> "State of the Union" 2022 Road Map 	
		Debra	Should we continue to meet?	
	Any new business?			

Other Sub-Sections

- [Data Migration Team](#)
- [FOLIO Technical Services Senior Management Team](#)
- [Keeping up with the FOLIO project](#)
- [Reporting Stakeholders Team](#)
- [Usability/Accessibility](#)
- [Integrations](#)
- [Project GROVER - Getting Ready for Optimal Validation of Electronic Resources](#)

Data Migration Team

CUL Data Migration Team

Charge

The Data Migration Team will provide central coordination for data migration into FOLIO in conjunction with data owners from across the library's administrative units. Membership is drawn from data owners across the library and the CUL-IT systems group.

The group will:

- Provide updated FOLIO documentation about data requirements to local data owners, as needed
- Document and provide central access to local mappings between Voyager fields and FOLIO fields, with direction from data owners
- Schedule and communicate about data loads into the Folio sandbox
- Work with data owners to identify test data that will exercise the FOLIO data features that are available in a given FOLIO release
- Make available to data owners the results of test migrations
- Collect and document feedback after test migrations in order to prepare for the next cycle of testing
- Provide feedback to the FOLIO community on community data migration tools

Data Migration Links

[Links to FOLIO Record Data Elements](#)

[FOLIO Data Migration Subgroup Google Drive Folder](#)

[FOLIO Data Loader Requirements](#)

[GitHub w/TAMU scripts](#)

Sharon Beltaine

Gary Branch

Jenn Colt

Ann Crowley

Greg Delisle

Robbie Douglas

Frances Webb

George Kozak

Deb Lamb

Data Migration Team Meeting Agendas and Notes

Joanne Leary

- [20190131 Data Migration Planning Meeting Agenda & Notes](#)
- [2019/02/11 Data Migration Team Meeting Agenda & Notes](#)
- [20190311 Data Migration Planning Meeting Agenda & Notes](#)
- [20190320 Data Migration Team Meeting Agenda & Notes](#)
- [2019/07/02 Meeting Notes](#)

Lisa Maybury
(consulting)

Joseph McEnerney

Peter McCracken
(consulting)

Heather Shipman
(consulting)

Access Services
Director (TBD)

2019-03-20 Meeting notes

Date

20 Mar 2019

Attendees

- [Jenn Colt](#)
- [Debra Sue Lamb-Deans](#)
- [Joanne Elisa Leary](#)
- [Greg A. Delisle](#)
- [user-b4a33](#)
- [Joseph McEnerney](#)
- [Ann Marie Crowley](#)
- [Sharon Marcus Beltaine](#)
- [Frances B. Webb](#)
- [Gary Branch](#)

Goals

Discussion items

Time	Item	Who	Notes
	Welcome to Joe & Frances		<ul style="list-style-type: none"> • Joseph McEnerney and Frances Webb will provide the programming support to support our data migration from Voyager to FOLIO
	Approach to FOLIO instances: separate sandbox and data migration environments, dummy data in sandbox for now	Robbie Douglas, Sharon, Frances	-(Sharon) Robbie has created a separate data migration FOLIO instance that this team can use to test out data loads and review results as a quality control measure before it is then loaded into Cornell's sandbox FOLIO instance for more testing
	Planning/discussion of loading CUL data: focus on bibid stubs to inventory first, user data later	Frances, Robbie	-(Jenn) should we target Q1 or Q4 for loading Cornell bibids? Makes sense to target Q1 release -(Frances) need to make a more Cornell oriented data mapping spreadsheet -(Frances) recommends a few core bib stats first -(Deb) For circ testing, it would be good to include barcodes in this initial data load -(Jenn) What is the scope of the bibid load? -(Frances) We can think about what data sets make the most sets to identify first -(Jenn) LTS is interested in producing some test cases -(Joanne) It would be useful to look at item type and loan period with circ matrix rules
	Review of Migration Steps Outline	Jenn	The group approved this process for Data Migration Steps
	Texas A&M is interested in collaborating with Cornell on data migration tool development.		-(Jenn) It would be good to establish a shared GitHub repository with TAMU -Joseph has reviewed some initial data loading PERL scripts from TAMU to get some background on what Anne Highsmith (TAMU) has been doing to test load their Voyager data into FOLIO -a subset of Data Migration team members will meet with reps from TAMU next week to discuss this potential collaboration further
	Next Steps: Data Mapping for Inventory	Jenn	Jenn will create a shared spreadsheet to start the data mapping for Inventory and will share the link for review and comments from this group

Action items

- [Jenn Colt](#) will add page on use cases to help Frances and Joe determine useful data sets to load
- In a future meeting, Data Migration team will create a list of the order of functional data areas to work on based on the FOLIO Roadmap

2019-02-11 Meeting notes

Date

11 Feb 2019

Attendees

- [Jenn Colt](#)
- [Sharon Marcus Beltaine](#)
- [John A. Ferreira](#)
- [Joanne Elisa Leary](#)
- [Ann Marie Crowley](#)
- [user-fd00c](#)
- [Greg A. Delisle](#)
- [user-b4a33](#)

Goals

- Demo of CUL FOLIO Sandbox
- About FOLIO Data Migration Subgroup/Discussion of charge
- Overview of CUL data migration work done so far
- How to document CUL Data Mapping Requirements going forward
- Review FOLIO Data Loader Requirements

Discussion items

Time	Item	Who	Notes
	Demo		<ul style="list-style-type: none">• Holding for another time
	Group background & charge		<ul style="list-style-type: none">• Time testing according to what's in FOLIO• Develop tools that can be adapted as FOLIO matures and fields are available• Migration testing will need to follow FOLIO development• Feedback needed from CUL implementation group on whether or not integration is included in this group• Feedback from CUL implementation group about membership• Diagram of what's out there in terms of data sources that will migrate to FOLIO would be useful
	Current migration work		<ul style="list-style-type: none">• Original mappings are in the FOLIO data migration group: https://drive.google.com/drive/u/0/folders/1aUmlqc4SwRzOGR4yPzrRSRElwM2CQ3uY see composite_to_folio spreadsheets for mappings• Inventory and other areas have updated mappings in various places, attempting to gather them here: https://docs.google.com/spreadsheets/d/1B924D2JaFuc6dqgtyKoOFdhn36lxwT6jaYmKpyk2Ws/edit#gid=1697459676
	Documentation		
	Data loader requirements		https://docs.google.com/document/d/1sULgEXYw_uGMf5bFwy_95LZ5KvqL8nGWSkEwpjaEzWY

Draft Charge

The data migration working group will provide central coordination for data migration into FOLIO in conjunction with data owners from across the library's administrative units. Membership is drawn from data owners across the library and the CUL-IT systems group.

The group will:

- Provide feedback to the FOLIO community on community data migration tools
- Provide updated FOLIO documentation about data requirements to local data owners, as needed
- Inventory the data sources that will be migrated to FOLIO
- Document and provide central access to local data mappings between existing system fields and FOLIO fields, with direction from data owners
- Schedule and communicate about data loads into the Folio sandbox
- Work with data owners to identify test data that will exercise the FOLIO data features that are available in a given FOLIO release
- Make available to data owners the results of test migrations
- Collect and document feedback after test migrations in order to prepare for the next cycle of testing

Action items

- ☑ Sharon Marcus Beltaine will gather feedback from the CUL implementation group on the charge, scope, and membership of the group.

20190131 Data Migration Planning Meeting Agenda & Notes

Attendees:

Jenn Colt

Sharon Beltaine

Agenda (Planning Meeting):

1 - Data Migration Staffing Resource

2 - Update on Potential CUL Data Migration Team participants

-Ann Crowley will attend, representing Finance

3 - Data Mapping Master Sources Confirmation

-From Charlotte: For the Inventory records - Instance, Holdings, item, and Container - then yes, this list our spec for Inventory metadata elements

-From Ann Marie: Looks like I built it back in August and it's living in the PO folder, but I'm not sure how much it is being maintained. I'll add a note in the PO channel to ask folks to add/update their links if possible.

4 - Review FOLIO Data Loader Requirements

[FOLIO Data Loader Requirements](#)

-does this meet CUL's needs?

5 - Data Migration Confluence Page

-created with initial structure

6 - Build Agenda for next Data Migration Team meeting

Follow-ups

-Sharon to find out how CUL can document data mapping

Meeting notes (2)

[Create meeting note](#)

Incomplete tasks from meetings

Description	Due date	Assignee	Task appears on
<input type="checkbox"/> Joe will keep working on the bib text import and then the holdings			2019-04-09 Developer Meeting notes
<input type="checkbox"/> Frances is working on locations import			2019-04-09 Developer Meeting notes
<input type="checkbox"/> Jenn will work on checking the holdings mappings against the existing json and the various spreadsheets			2019-04-09 Developer Meeting notes
<input type="checkbox"/> Jenn Colt will email about gap analysis		Jenn Colt	2019-04-02 Meeting notes
<input type="checkbox"/> Jenn Colt will set up weekly meetings for us		Jenn Colt	2019-04-02 Meeting notes
<input type="checkbox"/> Joseph R. McEnerney and user-fd00c will work on getting Joe's github add to the CUL-IT team. Robbie will also make sure Frances and Joe have write access to the git repo		Joseph R. McEnerney	2019-04-02 Meeting notes
<input type="checkbox"/> In a future meeting, Data Migration team will create a list of the order of functional data areas to work on based on the FOLIO Roadmap			2019-03-20 Meeting notes
<input type="checkbox"/> Jenn Colt will add page on use cases to help Frances and Joe determine useful data sets to load		Jenn Colt	2019-03-20 Meeting notes

All meeting notes

Title	Creator	Modified
2019-11-01 Meeting notes	Peter McCracken	Nov 01, 2019
2019-08-13 Meeting notes	Peter McCracken	Aug 13, 2019
2019-07-30 Meeting notes	Peter McCracken	Jul 30, 2019
2019-07-16 Historical Data MigrationMeeting notes	Jenn Colt	Jul 16, 2019
2019-07-10 Data Migration Developer Meeting notes	Jenn Colt	Jul 10, 2019
2019-07-02 Meeting notes	Jenn Colt	Jul 03, 2019
2019-04-09 Developer Meeting notes	Jenn Colt	Apr 09, 2019
2019-04-02 Meeting notes	Jenn Colt	Apr 02, 2019
2019-03-20 Meeting notes	Jenn Colt	Mar 20, 2019
2019-03-13 Meeting notes	Jenn Colt	Mar 13, 2019
2019-02-11 Meeting notes	Jenn Colt	Mar 12, 2019

20190311 Data Migration Planning Meeting Agenda & Notes

Agenda

Familiarize Frances and Joe with work done so far

- Data Migration Confluence pages
- attending FOLIO Data Migration meetings (11am Mondays)

FOLIO Data Migration Subgroup

- example of initial data mapping work : [Composite to Folio Inventory](#)
- current [Folio Attributes sources](#)
- [Migrate Record Types by System](#) example

Review FOLIO Data Loader Requirements

- [FOLIO Data Loader Requirements](#)
- does this meet CUL's needs?

Structure work for CUL Data Migration Team

- data mapping?
- list of migration tools?

Build agenda for larger group meeting (March 20, 11am to noon, Olin 703)

- who should attend?
- topics?

Notes:

- Charge has been added to the front page, our focus is narrowly on data migration
- Joe will get set up with Voyager, Frances sending login information
- Joe and Frances will attend data migration subgroup as they are able to <https://wiki.folio.org/display/SYSOPS/Data+Migration+Subgroup>
- [Sharon Marcus Beltaine](#) will make sure Frances and Joe have google drive access <https://drive.google.com/drive/u/0/folders/1aUMlqc4SwRzOGR4yPzrRSRElwM2CQ3uY>
- Inventory is best documented in terms of fields, working on getting other areas caught up <https://docs.google.com/spreadsheets/d/1B924D2JaFUc6dqgItyKoOFdhn36lxwT6jaYmKpyk2Ws/edit?usp=sharing>
- Frances and Joe will look at the data migration loader requirements https://docs.google.com/document/d/1sULgEXYw_uGMf5bFwy_95LZ5KvqL8nGWSkEwpjaEzWY/edit?usp=sharing
 - Comment on the issues
- [Joseph R. McEnerney](#) will follow the onboarding procedures here to get JIRA, etc accounts set up <https://wiki.folio.org/display/SYSOPS/Data+Migration+Subgroup+Onboarding>

migration steps outline

Draft Migration Tasks

These tasks are adjusted for each iteration of Folio that we have available to us. The output of each migration cycle will be documented in preparation for the next.

- Identification of data to migrate
 - functional areas will make choices about where their data is migrated.
- Data profiling
 - Provide an understanding of the content of data fields for mapping purposes, with an appropriate level of detail (for example, how the same field has been used by different units and may require different mapping for each case)
- Data mapping
 - The CUL-wide data migration group will provide central documentation for mapping, functional areas will provide subject expertise
 - Create local documentation for local choices
- Data preparation pre-ingest (e.g., converting to JSON for Inventory)
- Data ingest
- Data QA post-ingest
- Documenting feedback from functional areas about ingest results
- Gap analysis (CUL specific)
 - Data model feedback will go back to sigs
 - Feature feedback will go to FOLIO Data Migration Subgroup
 - Gap analysis will actually probably happen both before and after ingest
- Data cleanup recommendations based on test migration go to functional areas
 - possible cleanup on ingest
- Workflow Impact
 - Workflow recommendations based on test migration go to functional areas
 - Documentation of workflow changes will be needed with the new data models (for example, documenting consistent use of fields across units that may have previously been inconsistent)
 - for example, bound withs
 - This is lightweight input into fuller documentation produced by others

2019-03-13 Meeting notes

Date

13 Mar 2019

Attendees

- [Jenn Colt](#)
- Frances
- Joe
- Sharon

Goals

- Continue on-boarding

Discussion items

Time	Item	Who	Notes
	Review whether this is a useful framework migration steps outline		
	Work out agenda for the larger group		<ul style="list-style-type: none">• Lots of others are starting with users so that might be a good place to start<ul style="list-style-type: none">• identifying patrons and figuring out how to get them into the local sandbox• would it be all patrons or a test set that doesn't include students? Yes, probably• build out a plan for users and see if people think it makes sense• People have also been working on loans<ul style="list-style-type: none">• Rules for circulation• Tied to users• A bunch of initial mapping and choices have been made• Item data will require work<ul style="list-style-type: none">• Gets spread out into different areas• Mapping activities will always require some reporting<ul style="list-style-type: none">• Will tackle those things on a case by case basis• Right now we have both the mapping spreadsheets the data migration sig made, as well as spreadsheets of FOLIO data fields• Can we get the user FOLIO fields?• Pretty much anything we load that isn't bib or mfhd will need to get turned into json• Records get filtered on the E• Should we redo the mapping spreadsheets?<ul style="list-style-type: none">• They broke down when bringing in info that has its own structure• What data to work on?

Action items



Data Migration Test Use Cases

These use cases describe areas of testing that SME's would find helpful, please add yours:

Functional Area	Use Case	Requested By
Circulation	A data load that includes barcodes in order to provide the opportunity to test circulation features that depend on them.	Deb
Inventory	A data load that includes RMC data to test the mapping of their specialized use of item fields	Jenn

2019-04-02 Meeting notes

Date

02 Apr 2019

Attendees

- Jenn Colt
- Frances B. Webb
- user-fd00c
- Joseph R. McEnerney

Goals

Discussion items

Time	Item	Who	Notes
	<ul style="list-style-type: none">• Data migration requirements in the gap analysis• Sandbox, github access, JIRA• Configuration data workflow• Collaboration with TAMU• Process going forward		<ul style="list-style-type: none">• Jenn will email about the gap analysis• JIRA issues were created for location and instance data. We have JIRA space here: https://culibrary.atlassian.net/browse/FOLIMP-1• Discussed having scripts than go both API and direct to database loads• Discussed Joe's test inventory instances that he's been creating and talked about starting to try loading them

Action items

- Joseph R. McEnerney and user-fd00c will work on getting Joe's github add to the CUL-IT team. Robbie will also make sure Frances and Joe have write access to the git repo
- Jenn Colt will email about gap analysis
- Jenn Colt will set up weekly meetings for us

2019-04-09 Developer Meeting notes

Date

09 Apr 2019

Attendees

- [Jenn Colt](#)
- Frances
- Joe

Goals

Discussion items

Time	Item	Who	Notes
			<ul style="list-style-type: none">• Updates• Work planning

Action items

- Joe will keep working on the bib text import and then the holdings
- Frances is working on locations import
- Jenn will work on checking the holdings mappings against the existing json and the various spreadsheets
-

2019-07-02 Meeting notes

Date

02 Jul 2019

Attendees

- [Jenn Colt](#)

Goals

- Review the state of all FOLIO apps we are migrating data to
- Update on cleanup efforts for any data
- Evaluation of what data we are ready to begin test migrations for
- Next steps for each data area

Discussion items

Time	Item	Who	Notes
	Invento ry		<ul style="list-style-type: none"> • No place in the holdings model for historical barcodes. Could use a note field in the item record that has a note type? Former identifier is not typed at all. Former IDs is just an array of strings. Item note has a type. Has a vocab that can be edited. Loading fields from our items as notes with types. Notes array is flexible. Public/Not public flag for each note. Flagging all the item notes as staff only for now. Mapping what's there and report on data that doesn't fit. Report on what we don't know how to map. Item data 11 days right now, more once linking to holdings. Will need a local table to map them together. • No container record until q3 https://issues.folio.org/browse/UXPROD-492
	Source Record Storage		<ul style="list-style-type: none"> • Should be ready for testing in 2.2.
	MARC Cat		Feature not ready
	Circulat ion		<ul style="list-style-type: none"> • Identifying key elements in existing circ policies so we can map. Voyager circ matrix rules go to this policy • ID goes to this policy • Have 600 configured rules but they don't map one to one so we have to decide how that is to be done • Loan knows who, what, when, status information • Can load if we have items, users, mapping • Load of users that excludes students? • Would want historical access/ talk more about/ anonymized - back to 2000. Loan schema might present some issues for historical loans • Item status issue • Setting up patron groups ** • Locations are coming
	Library calendar		<ul style="list-style-type: none"> • Somebody needs to do • Every circ groups calendar
	Finance		<ul style="list-style-type: none"> • The feature is not ready, was pushed back to Q3. • Funds are drastically changing, being reduced • Invoices is a new module in q2
	Organiz ations		<ul style="list-style-type: none"> • Reports generated for cleanup but cleanup hasn't started yet
	Orders		<ul style="list-style-type: none"> • Would be okay to start seeing some test data • Pick a date range for orders 5 years, plus all standing orders
	Users		<ul style="list-style-type: none"> • Can we do a test load of staff and faculty? • Load an anonymized set of user data? • Alternatively do a security test on the system and see if IT okays loading student data • Would need to consider both FOLIO and DW • Phil advises to go the anonymization route

	Tenant set up (locations, service points)		<ul style="list-style-type: none">• Locations in progress
	Data Warehouse		<ul style="list-style-type: none">• Loaded EBSCO test loans until we have access to our test data. Eager to get our data as soon as we can.• Warehouse will cover GDPR, but still working out privacy.

Action items



2019-07-10 Data Migration Developer Meeting notes

Date

10 Jul 2019

Attendees

- Jenn Colt
- Tahir Ahmad Poduska
- Frances B. Webb
- user-fd00c
- Joseph R. McEnerney

Notes

Team updates:

Joe

- locations
 - hash of name to UUID
 - name, code in location data in FOLIO
 - how to know which column to do the matching
 - item permanent location value
 - get location ID
 - match to look up in a hash to get the UUID
 - location code and location name into FOLIO from frances, could match either but should use code for consistency, it's cleaner
 - lowercase, case should match
- holding record id to UUID
 - phil will make a table for us in some other name space/schema
- Frances will populate the table when it exists
 - define the table for Phil
 - integer col for the mfhd id
 - string col for the FOLIO uuid
 - **Joe will ask Phil for the table**
- do we want to do anything different with electronic holdings (ask J&P)
 - will it be eholdings or reg holdings
 - current elect holding
 - flag to say this is digital
 - other to be a placeholder for another call number
 - other ways to do this in FOLIO
- 5k is a test run
- barcodes
 - no barcode right now means not really an item?
 - empty items
 - active and inactive
 - choosing most recent active
 - **check in with LTS about barcodes**
- 90 seconds to generate a false set of json because it doesn't have locations
- item json for id and uuid mapping
 - also in voyager
- holding uuid to voyager id mapping
- so two tables
- **phil will need to give us an account that can write not just dbread**
- using test voyager for now

Frances

- generating her own UUIDs
- getting ready to try to push
- a lot of questions about the location mapping
 - getting shelving locations loaded in some form
 - Voyager locations span multiple roles that FOLIO breaks down (shelving vs circ desks vs both)
 - will become both shelving location and service point
 - yet more roles
 - some of those roles are related to accounting
 - anne
 - also questions about how Its wants to handle shelving locations
 - FOLIO doesn't let us load locations that aren't in definted libraries but there are questions
 - transaction history that references non existent thing
 - even if it is inactive
 - if in library that doesn't exist
 - no active and not active libraries
 - locations that exist for data reasons and aren't actually in a library

- circulation groups
- - loosely correspond to unit libraries
 - but not all location are connected to a circulation group
- making libraries in folio more representative of what the libraries are than what the circulation groups are in voyager
- ie no circ group for kroch asia and it makes sense from circ sense because it has no circ desk
- - separate lib
 - even though not separate circ group
- when do we start manually editing the locations instead of doing automatic conversion
- - front end work needs to be preserved
- **touch base with phil and sharon for something more formal on historical data**
- loan record has service point
- - service points are not a complicated piece of this
 - some are imaginary
- just generate fake stuff on load for the user load testing
- - probably

should create an oracle schema called folio and move everything to folio account
handing stuff off to the respective people after location load
 will still have some dummy circulations like faculty office

2019-07-16 Historical Data Migration Meeting notes

Date

16 Jul 2019

Attendees

- Jenn Colt
- Sharon Marcus Beltaine
- Philip Robinson

Goals

Discussion items

Time	Item	Who	Notes
			<ul style="list-style-type: none"> • For each area what historical data do we need to preserve data? <ul style="list-style-type: none"> • Convo between reporting and report requesters • Circulation <ul style="list-style-type: none"> • Collection usage back to when the system was launched • Andy and Joanne what do we need to report <ul style="list-style-type: none"> • more specific than collection usage • data elements • Accounting <ul style="list-style-type: none"> • Reports generally present most have had to go back 10 years for fiscal year data • Request to show expenditures into the past • Anne and Ezra - what do we need to maintain at Cornell going • Metadata management <ul style="list-style-type: none"> • Generally present • Ask Gary • E-Resources <ul style="list-style-type: none"> • Jesse • Can we put it in the LDP? <ul style="list-style-type: none"> • Yes, what DW is for • Maintaining database with current structure • How to simulate current structure? Or just leave it? • Porting it to PG • Could be in RDS on amazon? Cost to anything? Amazon manages <ul style="list-style-type: none"> • lots of options • keep in oracle would be laziest way for as long as possible <ul style="list-style-type: none"> • could do that for 6 months • Jan 2021 plan to migrate it to somewhere else • let people have the access to the DB • ask at Voyager meeting what they are doing • ask what people are taking to FOLIO format/cut offs • Action items <ul style="list-style-type: none"> • Mention at implementation team • Get familiar with work done by Reporting sig on historical data https://drive.google.com/drive/folders/1nCZjRK8riF6iO0_jpNUof2X8UjPi4g2y • Schedule RA, LTS, ERM, Accounting historical data meetings • Sharon talk to Nassib • Will talk to Voyager institutions • Outline current data migration implications • Preliminary systems investigations, look at some options for the data storage • Try and get ducks lined up to present to implementation team by Aug 15 because this impacts all data migration development

Action items



FOLIO Technical Services Senior Management Team

Charge:

The primary aim of the FOLIO Technical Services Senior Management Team is to coordinate the technical services aspects of Cornell's FOLIO implementation in conjunction with, and in support of, the broader role of the [OLE-FOLIO Implementation Project Team](#). In particular, the FOLIO TS SMT – which is comprised of the LTS Senior Management Team, plus the Associate Director for Information Management at the Law Library – is charged to:

- *Provide additional administrative and resource support for the technical services members of the OLE-FOLIO Implementation Project Team, especially those devoted to Metadata Management and Resource Management.* While these representatives already have a considerable amount of authority and access to resources within their own departments, a number of implementation concerns and issues for technical services will extend beyond these two areas and even across library divisions (e.g. they will affect Library Annex and RMC operations).
- *Ensure accountability for a number of implementation concerns that extend across the FOLIO functional areas, such as:*
 - Regular communication with the OLE-FOLIO Implementation Project Team and with CUL staff who will be using the FOLIO technical services modules;
 - Migration of technical services data from Voyager to FOLIO;
 - Import, export, and batch loading functionality for technical services data;
 - Testing of routine FOLIO technical services and related functionality;
 - Training and documentation for staff engaged in technical services processes;
 - Development and implementation of a post-implementation recovery plan.
- *Nominate and/or delegate additional technical services staff to support the various activities associated with FOLIO implementation and recovery, such as testing, training, workflow revision and adaptation, documentation, and backfill.*
- *Ensure adequate participation relating to technical services in the larger FOLIO community (e.g. participation in the SIGs) in support of the mission, vision, and priorities of CUL, LTS, and Law Technical Services.*

Timetable: January 4, 2016 – December 31, 2020 (estimated)

Membership and Primary Assignments:

- Adam Chandler (data migration, import, export, and batch loading)
- Jesse Koennecke (resource management; communication with FOLIO Implementation Project Team)
- Jason Kovari (chair; communication with CUL technical services staff; metadata management; testing)
- Xin Li (administration; LEG representative; communication with CUL technical services staff)
- Jean Pajerek (training and documentation; communication with Law Library staff)
- Former: Jim LeBlanc

[Meeting Notes](#)

[Documentation](#)

[Workflow Issues](#)

Documentation (FOLIO TS Senior Management Team)

[ALA Midwinter, 2016: Xin Li's notes from dinner with TS reps from Chicago, Duke, and Penn Authority Control in Kuali OLE: A White Paper \(June 2013\)](#)

[Identifier-based authorities \(May 2016\)](#)

[Vitro Pilot: LTS - proposal \(March 2016\)](#)

[Voyager Migration Documents \(Cleanup, Test Scripts, Recovery Planning, 2000-2002\)](#)

Voyager Migration Documents (Test Scripts, etc.)

Locations

Migration Decisions

NOTIS Cleanup

Test Records: BIBS

Test Records: Diacritics

Test Records: Holdings

Test Records: Authorities

Voyager Recovery: Preliminary Overview (April 2000)

Voyager Recovery: Team Charge (June 2001)

Voyager Recovery: Priorities (February 2002)

Meeting Notes (FOLIO TS Senior Management Team)

- [2015-12-07](#)
- [2016-01-19](#)
- [2016-03-16](#)
- [2016-04-11](#)
- [2017-09-18](#)
- [2018-03-22](#)
- [2018-04-24](#)
- [2018-05-14](#)
- [2018-06-12](#)
- [2018-07-09](#)
- [2018-08-07](#)
- [2019-01-14](#)
- [2019-03-11](#)
- [2019-04-15 \(LTS\)](#)
- [2019-05-13 \(LTS\)](#)
- [2020-02-10 \(LTS\)](#)
- [2020-06-08 \(LTS\)](#)
- [2020-07-13 \(LTS\)](#)

As of 2020-07-20, the LTS FOLIO Implementation Steering Group is dormant; the group will begin meeting again if a gap is identified in coordination or support for LTS' efforts related to FOLIO implementation.

2015-12-07

Attending: Adam, Jesse, Jim, Naun, Jean

1. We will aim to coordinate TS planning with the work of the OLE Implementation Team, with Jesse as our liaison to that group. Naun will be responsible for coordinating TS-related testing ; Adam for TS aspects of data migration; Jean for training and documentation; Jim for recovery planning. In addition, Jesse will serve as a coordinating lead for OLE Select & Acquire (S&A) functionality, Naun for OLE Describe, Jim will liaise with Deb Lamb-Deans for Delivery, and Adam will work with Chris Manly for Systems Integration & Implementation (SII). This breakdown of responsibilities is not intended to create silos of work, but to ensure that a single person within the group is accountable for planning and implementation tasks in each of these areas. In practice, we will need to work together and recruit others into the mix as planning progresses.
2. Jesse will talk to the Implementation Team about:
 - a. OLE TS Planning wiki space (with editing privileges for the five of us), either as part of the *main implementation site* or as a separate instance in Confluence with links to the main site
 - b. A timetable for access to the OLE sandbox
 - c. Our interest in building support for authorities (not currently available in OLE) – we would like at least to be part of this conversation with the OLE group nationally.
3. Jim will post an announcement to TSVOYAGE-L (i.e. to all users of Cornell's Voyager system) about what we're up to. We'll use this list and our wiki space, at least initially, to communicate about TS aspects of OLE implementation. [After the meeting, we decided that this step might constitute communicating too much bureaucratic detail too soon. Rather, we will add these meeting notes our Confluence page after it's up and running and alert the CUL TS community to the page's existence at that time].

2016-01-19

Attending: Adam, Jim, Naun, Jean

1. Xin Li's notes from the dinner at ALA Midwinter with Bob Byrd (Duke), Chris Cronin (Chicago), and Mary Beth Picknally Camden (Penn) are available as a Google Doc. Jean and Naun also attended this dinner meeting.
2. Jean plans to talk to her counterparts at the University of Chicago's Law Library regarding predictive serials check-in.
3. Is there a place where we can find all the OLE white papers related to TS functionality? Probably not, so we might need to seek these out through our associations with various Subject Matter Expert groups (SMEs – pronounced "smees").
4. Jim will share the Voyager test scripts that he still has on file from 2000 with the rest of the team.
5. Can we get Chicago's test scripts? [Looks like some of them are [already available](#) on the CUL Implementation Team wiki].
6. Can we look into automating our test scripts, using software such as [Selenium](#)? [Naun, can we presume that you'll look into this at some point as our lead for testing?]
7. Use of OLE will put an end to the Voyager OPAC (i.e. the Classic Catalog).
8. While development of the OLE e-resource management (ERM) system has been problematic, it is likely that we will initially want to continue our use of ProQuest's Intota system in any case. Intota is not only fully baked but this approach will allow us to continue to explore productive ways to collaborate with Columbia on e-resource processing.
9. It is still not clear to us when we will have access to the OLE sandbox, but sooner is better than later. There are a number of reasons for this:
 - a. Until we have access to a version of the sandbox, it will be difficult to become conversant about OLE. This means that membership in SMEs, further impromptu conversations with our counterparts at OLE institutions, and participation in site visits cannot profitably take place at this time.
 - b. With access to the sandbox (presumably with our own data in it), we can begin testing not only our regressive testing scripts, but actually practice them during OLE upgrades (presuming that OLE is willing to upgrade the sandbox for us). This will also help us to get into the mindset for "constant" upgrades. Getting "our own instance with real CUL data ... as soon as possible" was a takeaway from the dinner at ALA.
 - c. LTS alone currently maintains 139 formal [policies and procedures](#), many of which pertain to working in Voyager and will need to be rewritten for OLE. It would be useful to connect this work with planning for both training and testing. [LTS Procedures Coordinator, Lois Purcell, has since indicated her willingness to work on this]
10. Naun has asked to be appointed to both the Describe SME Team and its Authority Control sub-group. It is not clear to us from participants' memory of the ALA dinner discussion, whether the SME Teams encourage a "business analyst" (BA) from each member institution. This is not a pressing question, because until we have access to a sandbox it is unlikely that we'll be able to contribute much to these teams anyway (see above).
11. Further regarding SMEs, we should try to find out at some point whether terms for team participants are fixed or open-ended. These commitments (some possibly heavy) will be more useful at some points in Cornell's OLE life than at others. It will make sense to add Adam (or his TS designate) to the Import/Load SME Team, but not until we know more about the system.
12. We currently have a Voyager Security Team that is responsible for permissions in the system (Jean represents technical services on this group. Will such a team be appointed for OLE?
13. This team still needs a Confluence page for its notes and TS-specific documentation. Jim will contact Holly about this.
14. With the development of CUL's OLE Implementation Team since our last meeting and Xin Li's appointment as CUL's voting member on the OLE Functional Team, Jim will draft a charge for this group, chiefly to identify those areas of accountability for OLE implementation in Cornell technical services required to supplement CUL's other OLE roles.
15. We will continue to meet on an ad hoc basis and will invite Holly to our next session (TBD).

2016-03-16

Meeting_Notes
March 16, 2016
2:00 - 2:45
Meeting: OLE, Authorities Investigation
Present: Jim, Naun, Jesse, Jean, Adam

Our options for OLE:

1. Do nothing
1. Contract with vendor to manage headings changes in our bib records
1. Do it ourselves
1. Hybrid: vendor and us

Q&A:

What is the status of our RDA compliance?

Some of our records, newer ones, are RDA or hybrid. We do not see a strong case for converting all our catalog to RDA.

Do we really need LC name and subject retrospective cleanup?

We really don't need retrospective headings cleanup.

So what do we need?

Changed or update authority headings or when they need to be deleted we have kept up. We have NOT kept up with cross headings in bibs -- if we had enough resources, we would do this. Lydia has reports, but Joe can never quite do all the work.

Flipchart notes:

Authority vendors - questions, templates

- Not interested in RDA enhancements unless freebie
- Can we pay for backfile based on cleanliness of data?
- Are there different rates for print & erecords? (and what do we want to include?)
- OLE specific services?
- Which identifiers can they give us? E.g., VIAF, ISNI, Orchid, OCLC work ids
- Want to get a sense of flexibility (e.g. willingness to work w / non-LC authority, help w e-resources, GoKB)

Templates:

For each vendor:

- Service
- Present/absent
- Cost (one-time)
- Cost (annual)
- Frequency of updates
- How they charge (i.e., per record)

Services:

- Setup
- RDA enrichment

- Name heading maintenance
- Subject heading maintenance
- Populating heading w/identifiers
- Maintaining identifiers
- Heading changes as part of cataloging process (requires own authority file)

Upcoming authorities pilot:

We will be taking advantage of the time we have as a result of the OLE delay to do a small scale pilot that will involve creating authorities in Vitro.

2016-04-11

11:00 - 12:00

Meeting: OLE Pre-migration cleanup priorities

Present: Jim, Jean, Naun, Jesse, Adam C., Lydia, Ann C.

Lydia has reports that fall into these categories:

1. Unused funds and vendors
2. POs that migrated from Notis with bogus fund
3. When we cancel serials, we don't always cancel PO
 - Are these mistakes? Sometimes we have to wait because vendor says to hold on, but we don't often get back to it. Or we are waiting for a credit.
4. Gazillion open purchase orders over 3 years old

Plus:

- Barcode issues that Barb deals with: numbers that are clearly incorrect (e.g. length, prefix), duplicates

Ann:

- She would like to see cleanup of purchase orders. She can't delete funds that have PO attached.
- We have re-purposed "bogus" fund. Over 6,000 total in Voyager.

Lydia:

- Fiscal year turnover is slower because we have so many problematic PO issues
- Our last opportunity in next 10-15 years to cleanup
- She can provide any reports we want
 - Bogus
 - Cancellations
 - Old pending
 - Etc.

Jesse:

- For now, perhaps we should focus on the problems that we know will cause Ann and her staff a headache in the fiscal year turnover this summer.

Naun:

- Also, Pedro's in-process report. A lot of these titles have been cataloged on different records - possibly as many as 2000-3000.

Jim:

- What about location proliferation? Lydia says it is easy to run a report that shows item count by location (and location display name), as a starting point.
- Ann: what about locations for closed libraries?

Possible priorities / action items

- Ann will run Voyager "Snapshot commitments" report to identify POs associated with obsolete funds and will give to Jesse, who'll share it with Deb. If staff need more info, Lydia will help. This will be LTS's #1 clean-up task.
- Lydia will run report to identify no-longer-used vendors to be deleted and will give to Jesse, who'll share it with Lisa. Staff will verify circumstances and will delete vendors from Voyager when appropriate. This will be LTS's #2 clean-up task, though we might be able to work on both concurrently.
- Unless Pedro has already begun work to eliminate the false hits in the in-process report, Adam will speak to Lois about working on this when there's a lull in her other assignments. It's likely that some of this clean-up can be done in batch,.
- Lydia will run report to count the number of active titles by Voyager location and give to Jim for review.

2017-09-18

Attending: Adam Chandler, Jesse Koennecke, Jason Kovari, Jim LeBlanc, Jean Pajerek

Updates: who's doing what?

- Jean has been regularly attending the FOLIO webinars and Chris Manly's First Friday sessions
- Adam is serving on FOLIO's Privacy SIG (although that group is currently on hiatus); he will also be participating in the Metadata Management SIG's discussions concerning batch processing and, in particular, replacing Cornell's LS Tools in conjunction with FOLIO development
- Jesse is serving on FOLIO's Product Council, which has recently been talking about governance; he is also serving as the Council's liaison to the Accessibility SIG (which will be dealing with keyboard shortcuts, usability, and ergonomic health, among other things); Jesse is a member of the Internationalization SIG, as well (another group that is not currently meeting)
- Jason has recently joined the Metadata Management SIG, which is now discussing batch processing; the group is also reviewing on the FOLIO Codex, a data model designed to facilitate the co-existence of multiple metadata standards
- Peter McCracken is participating in the Resource Management SIG

Other points:

- CUL's target implementation date has now been officially postponed to June 2019; as Jesse describes FOLIO's current status, "Marketing is far ahead of the product"
- It is important to keep in mind, and for technical services SIG reps to emphasize, that implementation of FOLIO is likely to have a greater impact on technical services during both the pre-migration testing period and the months following implementation
- Jim will place copies of Voyager migration test scripts and the CTS recovery plan from 2000 in the [documentation](#) section of this Confluence space
- We will not meet again until we have reason to do so, possibly in January 2018

2018-03-22

Attending: Adam Chandler, Jesse Koennecke, Jason Kovari, Jim LeBlanc, Jean Pajerek

1. *Composition of group.* With Jim's departure at the end of April, Jason will assume responsibility for coordinating the work of this team. Jim will continue as team lead until then.
2. *Recovery plans.* The team has not yet determined who will take responsibility for recovery planning, but the group will convene in late April to review the [CTS Voyager recovery documents](#) from 2000-2002, which might still be useful for FOLIO implementation.
3. *Lead time.* The team agreed that the FOLIO release CUL plans to implement must be available for testing at least six months prior to implementation in technical services. This requirement is in line with the CUL FOLIO Implementation Team's initial working assumption, based on input from UPenn and Duke regarding the implementation of OLE at those institutions – see the third entry in the table in [CUL's OLE/FOLIO Assumptions & Constraints Log](#).
4. *Collaborative migration and implementation.* At least two other institutions are tentatively planning to go live with FOLIO in summer 2019. We are hoping to work collaboratively with those institutions to share planning strategies, testing protocols, and documentation (including training plans) for technical services. Jason will work with Holly Mistlebauer to formally establish these connections as soon as possible in coordination with the work of [CUL's Implementation Team](#).

2018-04-24

Attending: Adam Chandler, Jesse Koennecke, Jason Kovari, Jim LeBlanc, Jean Pajerek

1. We reviewed the CTS recovery documents from the NOTIS-Voyager migration in 2000 and the two years following (available from [this page](#)). We agreed that although the way we do our work and the data contained in those documents are outdated, the structure of the recovery plan, team charge, and ongoing priorities can serve as useful templates for FOLIO recovery planning.
2. Jason and Jesse will begin networking with our counterparts in the "early adopter" group at the [World Open Library Foundation Conference \(WOLFcon\)](#) in May. It will be good to share some of the planning work (documentation, other system migration experience, etc.) collaboratively with technical services leads from those other institutions that are also tentatively planning on moving to FOLIO next summer.
3. Jason will ask Laurie Stevens to schedule the next FOLIO TS SMT meeting for sometime shortly after WOLFcon and will invite Holly Mistlebauer as well.

2018-05-14

Present: Jesse, Jean, Xin, Jason, Adam, Chris

CUL wide and community implementation engagement

- CUL group does not have an implementation team, necessarily. LTS ahead on this and could be a model for other groups
- Monday meetings - currently tracking CUL's engagement in the broader FOLIO team; either need to pivot that meeting to an implementation OR have a separate meeting for implementation
- Is it a LEG decision as to whether we implement FOLIO July 2019? What does it mean if the rest of FOLIO takes longer than an extra year or so? How do we assess risks and whom do we involve?
- EBSCO
 - EBSCO made their intention clear - developing methodology, training materials and documentation for their beta testers; they will deploy in Amazon and will share knowledge around that, as well. They will NOT be proprietary about their implementation documentation.
 - "An Implementation is an Implementation"
- Broader FOLIO implementation groups
 - Early Implementers Group forming that is everyone
- OLE Implementers Cohort
 - Cornell, Chicago, TAMU; possibly also Duke and Lehigh
 - We have work to do to figure out self-hosting of FOLIO (rather than an EBSCO hosted solution)

WOLF-CON recap & FOLIO updates

- Face-to-face aspects were very productive to get devs and subject experts together
- Twice the number of on-site attendees as originally anticipated
- Ability to hammer thru topics that SIGs had issues addressing in the calls
- Jesse can see WOLF-CON transitioning into a conference that is more relevant beyond only developers and those working with development of the platform
- Timelines: what are they? What is version 1.0?
- Concrete items from WOLF-CON (select):
 - MARCCat
 - WeCat is being turning into micro-services to implement in FOLIO
 - Tiziana will be sending Jason some screenshots for us to view locally
 - ERM
 - Aggressive but feasible timeline; could be implemented before rest of FOLIO
 - D&A is considering switching from Summon to EBSCO... and FOLIO ERM is likely to work well with the EBSCO KB
 - Important to make a differentiation between ERM and KB; there is a question, though, of whether we are required to have EBSCO knowledge base for ERM v1
 - Workflows App
 - May facilitate LSTools replacement; customizable layer where an institutions' can be tracked/processed through defined workflows.
 - ITSO matrix to determine vendors for orders

Communication plans for FOLIO in LTS

- LTS Heads for May will include FOLIO update
- We need to be clear about concrete items within FOLIO
- We assume that people know little about the FOLIO topics; trust depends on us distilling and simplifying the information.
 - Here are two groups working : developers and subject experts
 - Here are the list of products / services being worked on
 - link their livelihood to the development framework
 - can we assume that for the next 6 months that staff know little about FOLIO... and translate into our vocabulary/terms the relevant aspects of the system
 - If we frame our updates, will help us articulate our needs and that feedback into actionable use case for FOLIO
 - For each functional area in LTS, demo what is happening in FOLIO and what is planned.
 - Do not want to assume that our current org structure maps directly to FOLIO
 - Always say to remember that this is not an upgrade of Voyager... it is a new system with potentially new workflows

General questions raised:

- What does an implementation in 2019 mean? What about 2020? What about phased implementation?
- What are undecided things without an owner?
 - E.g.: recovery plan and checklist for implementation?
- Should we implement? Do we need training visits? If so, where to go? Want to plan ahead for travel funding that is needed?
- Do we need additional staff during the development period to allow people to be freed up to develop training, travel, etc.?
 - Needs throughout the process — backfilling now as we begin?
- Sounds like enough pros to consider doing ERM implementation. Wants to know what components must be ready, by when. Worry is that ERM is moving well on paper... but if talking about 12/2018, consider what delays would derail this. Conduct audit of what workflows would break if moving to new ERM.

Data migration gap analysis (MARC to Inventory — not MARC to MARC)

- Did not discuss during meeting; Jason and Adam to meet with Sharon to discuss

For next meeting

- Actions to being soon (potential):
 - data clean-up

- updating/reality-checking OLE checklist
- more?

Action Items

- Jason: share WOLF-CON notes directory
- Jason: find OLE check-list and send to LTS Implementation group
- [Who?]: Use ERM as exercise for option 1 and option 2 with contingency plans — to make a recommendation for LEG about ERM implementation
- Chris/Holly: Considering using LTS structure / approaches to help CUL-wide to coordinate rest of library units on planning

2018-06-12

Present: Xin, Jean, Jesse, Jason

Agenda:

1. Review of Action Items from [2018-05-14](#) meeting
 - a. WOLF-CON Notes Directory: https://drive.google.com/drive/folders/1pmzssUln_4dEz0l3MpjC5mnN5gDtO7yF?usp=sharing
 - b. OLE LMS Requirements spreadsheet: <https://docs.google.com/spreadsheets/d/1fYTYNG4eLjgk4WN8vaLePClz6JG9RyAO0fH6Rw2yJR0/edit?usp=sharing>
 - c. [Who?]: Use ERM as exercise for option 1 and option 2 with contingency plans — to make a recommendation for LEG about ERM implementation
 - d. Chris/Holly: Considering using LTS structure / approaches to help CUL-wide to coordinate rest of library units on planning
2. FOLIO-wide Updates – Anything from Product Counsel or elsewhere? (Jesse)
3. FOLIO ERM and EBSCO Knowledge Base – any CUL-related updates?
4. FOLIO Inventory definition
5. MFHD and FOLIO Inventory discussion
6. Next steps – what actions should we be taking with LTS staff in the coming 2-3 months?

Notes:

- FOLIO Early Implementers
 - Group beginning to meet and is starting
 - TAMU has a robust data clean-up plan
- FOLIO Product Counsel
 - has been prioritizing remaining work into do-able chunks : being pushed by early implementer libraries. The work not prioritized will need to be determined whether effort can be devoted otherwise
 - WOLF-Con will be rotated globally twice-per-year, replacing the current developer meetings
 - late October / early November for next meeting
 - Visioning effort to ensure that it can be ready for expanding FOLIO world – allowing for getting new libraries involved
 - Jesse will be the next chair-elect of Product Counsel; affords a set at product counsel executive group, which makes some decisions and sets agenda for the product counsel
- ERM and EBSCO KB
 - No updates from the last meeting
 - LTS SMT recommends group to discuss/determine whether CUL will migrate KB to EBSCO
 - Group will determine Whether we move to EBSCO; if so: when and what impacts this will have for public services, D&A, IT and LTS
 - Representation: someone from AERLS, someone from D&A, someone from IT
 - Xin: bring Sandy up to date on a recommendation about process for the subgroup
- Inventory
 - has a working definition from the Metadata Management; currently being finalized and discussed at FOLIO-wide: https://docs.google.com/document/d/16C83Yy61GVm9dYs7aRKj9Z0on-vEuBcfXiCjuo_jALo/edit
 - Holdings data is to be managed in the Inventory (outside MFHD standard); there is a current gap between the data models (MFHD and Inventory Holdings), which is being assessed
 - IF the Inventory data model is rich enough and can output MFHD in version 1, this will mitigate all concerns; that said, there is concern about whether this will be available in the first release. Question of how to proceed is currently in discussion in Metadata Management group
 - Question of what connections this could have for Ivy+ Shared Index... keep this in mind as both groups progress work.
- Timeline for implementation
 - In October 2018, we'll know for certain whether we will move in summer 2019; this will be based on whether the October release meets our functional requirements, which are still to be finalized/determined
 - October deadline is more "here is what is happening" – lots of work to be done before then to scope work and outline variables (e.g.: "if CUL definitely wants to move to FOLIO in 2019, _____ is required...", etc.)
 - If any timetable shifts, there are resource implications. Chris Manly has an action item regarding writing resource requirements for continuing Voyager IF 2019 is not feasible
 - Outside of FOLIO
 - Annex Inventory Solution (CAIAsoft - being implemented Summer 2018), ArchivesSpace, and other systems that have connections with ILS
- Next steps for our group
 - Law Library has group viewings of First Fridays
 - Lots happening in FOLIO development but it is mostly on the back-end
 - Morale issue: some colleagues see negative things - we need to demo good aspect of the work
 - In the Heads meeting, can we have an update (e.g.: Inventory discussion about move away from MFHD); value of the counter-balance. Frame more as: what is the role of MFHDs?
 - When we talk about Inventory... we talk about MFHD, Cammie talks about Annex Inventory of items, etc.
 - encourage people to do Friday FOLIOs
 - Reinforce always: Jean is the lead for training – and will necessary support for this work
 - FOLIO topics for LTSHeads : confidence building
 - October decision for timeline and progress (June)
 - Vendor Management App (June)
 - Inventory's definition AND holdings data (MFHD & Inventory data model) : July
 - Cataloging tool: showing the WeCat screenshots : August
 - Training: Jean overview of NOTIS-to-Voyager migration – give confidence that someone is structuring training...

Action Items:

- Jason: assess / identify easily accessible space for documentation
 - include early implementers group documentation spaces

- Xin: bring Sandy up to date on a recommendation about process for the KB migration subgroup
- Jesse: agenda item on LTSHeads in June
 - FOLIO already on the June LTSHeads agenda
 - October decision for timeline and progress (June)
 - Vendor Management App (June)

2018-07-09

Agenda

- Updates
- LTS Heads meetings - including FOLIO
- Feature prioritization
- Inventory data model gaps analysis
- Metadata Clean-up group

Present: Xin, Jesse, Jean, Jason

Notes

- Updates
 - CUL implementation plan starting to form. Chris, Jesse and Holly have been building a high-level outline for this so that we have a foundation when the larger group. Started with Chicago's OLE implementation work plan.
 - For CUL group, we'll need to begin the discussion of FOLIO, make it good that things will be different... that we're rebuilding and reconceiving of workflows. Need to set mindset that 'it will not look anything like Voyager but it will do good work'
 - Jesse will watch various Sprint review videos and provide TOC and video link to LTS-L
- LTS Heads meeting - FOLIO topic
 - LTSHeads meeting next week. Can we ask people what would work best for them regarding the LTS work plan? This is when we start managing expectations. Should we first map LTS plan to CUL plan and then ask LTS what is missing?
 - Show faith in the open source project and be truthful
 - Really manage expectations. LTS Heads need to start understanding the diagrams
 - We need a faith in the process
 - Clean-up as a project.
- Feature Prioritization - Reality Check
 - In Jesse's role as PC rep from Cornell: there's lots that needs to happen between now and specific dates for early adopter libraries. Took all JIRA tickets and assigned value of prioritization. Jesse worked with SIG reps from Cornell. When they were unavailable, Jesse did best to answer the prioritization
 - For Cornell, go-live is essentially things that Voyager facilitates that we cannot get rid of Voyager without those functions
 - EPICS: https://docs.google.com/spreadsheets/d/1_jc7q4ISDppCOYqLvCX-CdHoKWUeQFdc3331BT_HVh4/edit?usp=sharing
- Inventory Gap Analysis - overview of work
 - Jason, Frances, Pam, Margaret, Gary, Sharon and others worked to identify the gaps in the Inventory data model around Instances (bibs), Holdings and Items, work available: https://docs.google.com/spreadsheets/d/1JrvLq-pQ861pNnW_AEn0xsSujr9yTuM8MOHSWJ_XSZA/edit#gid=940430321
- Metadata Clean-up
 - We will identify a team, based on volunteers, to work on pre-FOLIO migration clean-up. Important due to: 1. data mapping will be better if we ensure higher data consistency and accuracy and 2. we have streamlined processes for editing and updated Voyager data alongside extensive staff expertise with the system; we should leverage this

2018-08-07

Agenda

- FOLIO Updates
- Staffing needs, pre- and post-implementation
- What's missing re: LTS' planning

Notes

- FOLIO updates
 - Implementation timeline
 - CUL still discussing whether there are phased implementation potential, e.g.: ERM implementation. Also : can we move outside of the fiscal year turn over?
 - Jenn Colt and Sarah Ross joined MM-SIG
 - MARCcat: Sarah and Pam — joined the MARCcat subgroup and will be assessing the tool with Jason and others
 - Jesse to send out the next sprint review video soon
 - Jason met with Susie re: physical processing
 - In FOLIO's JIRA, there is an item related to spine label printing that seems to cover our issues.
- Resource implications for implementation.
 - Available resources will always be smaller than desired resources; what is the method for determining capacity needs?
 - Need to determine pre- and post- implementation resources required. Difficult to estimate but needed for LEG planning.
- What's missing re: LTS' planning
 - Succession planning: staffing for those in the project who are engaged/critical from the beginning

Action Items:

- Resource implications re: implementation
 - Jason: will put a draft forward to this group. process: Jason meet with Metadata Clean-up Group... discuss capacity issue and map to the Voyager implementation documentation.
 - <https://confluence.cornell.edu/pages/viewpage.action?pagelId=348614146&preview=/348614146/354194520/Voyager%20Recovery%20Overview.doc>
 - <https://confluence.cornell.edu/pages/viewpage.action?pagelId=348614146&preview=/348614146/348614316/voyager%20recovery.doc>
 - deadline: aim to have something to LTS FOLIO Implementation Steering Group by August 30th...
- Jason: reschedule the 9/10 meeting (DONE)
- Jason: get access to WeCat for Jean (DONE)

2019-01-14

Agenda:

- With Jim's departure, which functions for FOLIO implementation are negatively impacted? How to address these gaps?
- Scope and purpose of the CUL FOLIO Technical Services Senior Management Team

- Jean: Chris Manly's First Fridays was a good mechanism. some effort should be made to continue that.
 - Jesse will be taking this work on starting February
- Jenn: sharing between people on SIGs and information more generally, it is unclear where the people in this group are communicating. Figuring out how to get some of these answers in a format in a place where people can digest it.
- Jenn: concerning that LTS does not have anyone in reporting; we need more communication with wider-CUL implementation team. For teams where we have LTS representation, we do not have good forum to get information.
- Jenn: what is split of responsibility between migration and importer - and how is this being resourced
- Adam: what is the risk here?
 - developing solutions working cross-purposes
 - not gathering the use cases from all
 - allows to make more informed decisions about individual groups
- Xin: LEG meeting triggered discussion of LTS Steering Committee
 - Among LTS members, do we know what left-and-right hands are doing?
 - Adam: trust that people are making those connections.
 - Jenn: trust for people within LTS; less trust in LTS to CUL-IT. We have nobody on technical counsel.
 - Jesse happy to bridge people outside of CUL.
 - Gary: good having LTS member at table to correct assumptions of systems; add the subtleties. To see early enough in the process that something isnt quite right... and to then point folks in the right direction.
 - Pam: have trust but am on Gary's side – assumptions made where we create dealbreakers...
 - In LTS FOLIO Steering Committee, said Jean would be only person remaining that did NOTIS to Voyager migration - with training documentation. She is reverse engineering the training. How do we think about migrating, training staff, what to do, etc.?
- What do we need?
 - Sarah: listening post. not formal minutes... but a place where we can say "I heard this today..."
 - Weekly OLE announcements from Holly. Jean: needs to be communication mode for those who are not technically motivated - these are jargon-y
 - the lists are long and updates about SIGs are very, very brief
 - Group viewing for FOLIO webinars. 1/23 FOLIO roadmap
- Things not discussed today, but are important:
 - we've discussed inner-LTS communication but not LTS-to-CUL communication.
 - is some of this because we lack a project / implementation manager?
 - Is the LTS Steering Committee the best way to work? Walking away without a clear sense of this.
- Action Items
 - Jason: Write message to LTS-L about how to subscribe to various lists
 - OLE/OLE-lists
 - CUL listserv?
 - overview of the communication channels that exist, including passive things like wiki.folio.org
 - Include who is involved in the various SIGs

2019-03-11

Present:

Agenda:

- Updates
- Messaging and Communications around FOLIO
- Project Management
- CUL-wider FOLIO Implementation new staffing: Debra and Phil

Notes:

- Updates
 - Gap Analysis
 - due end of April
 - set the priorities for about a year
 - Jesse will engage with LTS staff; will run this past Debra and CUL FOLIO implementation team. Will speak with Debra and update group.
 - Group will review gap analysis – including what we've already identified for priority
 - Why do we think this will be able to direct work for a year? The last one was only a few months ago.
 - Debra will be leading the internal implementation project; launching and implementing is based on must-haves. How will she manage this?
 - parallel tracks could be reverse engineered once her process, workflows and timelines
 - Data clean-up
 - Charge begun
 - Dialogue but not necessarily seeing it the same way
 - Dannielle's charter used in LEG; forces us to focus on objectives and scope
 - Migration
 - Has anyone contacted Ex Libris? We've been speaking with EBSCO
 - Holly has been the point person on this conversation. Will this move to Debra or Phil?
 - Ask Jenn whether this has come up in the migration group
 - Speak to Debra to make sure that this is in her queue
 - Sandbox
 - Usability group will be collaborating with CUL Implementation on focused user testing around the sandbox
- Messaging
 - Zsuzsa is being contacted for the CUL-wide group
 - One person mentioned perception is that people expect to see more and are disappointed when they do not see it. They believe expectations of 2020 migration are unrealistic. Realism is important... and causes unnecessary stress for people. Stress between official message and what they are/are not seeing in development
 - Lucy and the football; have been talking about this for years – perception is that there is not enough to show.
 - Lack of information is felt. LEG made decision to hire two people as more-and-more this is a project management issue.
 - Fundamental component is to communicate where we are. Hope that we can manage expectations – knowing that there is planning (e. g.: gap analysis) underway.
 - LTS people began to say good things about the system; some have been negative and amplified the negatives... bringing people together in a realistic way so that others can bring in feedback. Jenn is realistic and does not up-sell.
 - How SMT walks around / speaks about this is important. We need to be confident and not over-sell.
 - Communicating for LTS – perhaps a shorter message for LTS that goes along with CU-LIB. Communications around how do broader announcements impact LTS
- Project-management
 - should derive from the implementation project manager – along with expectations for work. Role, definition of role and scope of responsibility
 - not all needs rigid structure.
 - enormously complicated. having implementation happen concurrent to development.
- FOLIO staffing

2019-04-15 (LTS)

Present: Jean, Jesse, Jason, Adam, Xin

Agenda & Notes:

- Updates from CUL-wide discussions/efforts
 - Gaps analysis underway
 - FOLIO in-person meeting before ALA Annual
 - EBSCO hosting proposal underway
 - how would this effect our implementation? when will proposal go to LEG?
- Communication, feedback and development of the Staffing Projection spreadsheet (Jesse to share to LTSHeads shortly)
 - include: follow-thru to represent these data on the CUL spreadsheet
 - internally: conversation in smaller groups: talk to them directly
 - externally: need to say "we need to slow down and pause things". one thing that worries is that having a sheet outside of FOLIO projection is that things fall out of sync. Ensure this is a reference point with 'exact' data pointing to the CUL staffing sheet
 - at LTSHeads we should say " we will develop communications plan internally and externally, that will include impacts on other units due to LTS' impact"
 - dependent on LEG's budgeting
- Questions arising from staffing
 - can we create a documentation space for people to ask questions – for us to then answer? FAQ style?
 - ACTION ITEM: Jason gets page started in Confluence.
 - ACTION ITEM: Jean will manage questions / ensure responses, which should be mailed directly to her
- Engagement of CUL (notably LTS) engaged dev staff
 - EBSCO migration : in SMT queue to discuss Thursday. Peter might be in this role
 - Data Migration : Jenn is lead
 - ACTION ITEM: after SMT meeting on Thursday, Jason will discuss with LTS implementation-related leads about engagement in this group.

2019-05-13 (LTS)

Attendees: Jason, Jean, Adam, Xin

Regrets: Jesse

Agenda:

- Updates from CUL-wide FOLIO planning
 - Zoho being used for project management; LTS colleagues can ignore until they have tasks
 - Deb Lamb being replaced by Joanne Leary until 7/1, at which point Andy Horbal will replace Joanne
 - FOLIO Friday question re: MARCcat editor's prioritization and timeline
- Training planning personnel:
 - Cataloging: trainers identified already
 - Acquisitions: not yet identified for personnel
 - Documentation: Nancy Solla
- Cataloging impact planning update
 - Jason will be meeting with colleagues
 - Bring up the idea of reaching out to others who have implemented other ILs recently... and whether other institutions want to engage in this surveying - if others want to participate in survey, let's involve them
 - Once we know who wants to be involved re: other institutions, bring to SMT to know how to proceed with an ecosystem view
- Work you'd like to see happening from this group (brainstorming)
 - Global picture of EBSCO? Ask Debra to better understand what will be included with EBSCO contracting. This pertains to both hosting as well as the EBSCO documentation and train-the-trainer plans
 - How do we periodically resurface things that we've asked already?
 - Go out to people who have implemented Alma recently to inquire about their experiences. Keep this on Debra's radar
 - whom to involve? rather than looking at segmented production (cataloging, etc.), look at entire ecosystem of ordering to shelving.
 - should we read two articles and then think about how we approach FOLIO implementation in LTS
 - Identify training teams and when to start them
 - How about a space for Technical Services dialogue (could it be Slack, email, etc.)?
 - We need owners of tasks... and to understand how to string things together with communication.
 - Do not silo LTS work here – ensure that we are integrated
- Frequency of meetings / scope of meetings
- To Do before next meeting:
 - Share insights from lit review
 - share discussion from the aforementioned cataloging meeting
 - community building for technical services colleagues

2020-02-10 (LTS)

Present: Peter, Jesse, Jenn, Laura, Jean, Adam, Jason, Xin

Agenda/Notes:

- ERM implementation - update
 - Started using ERM last week. Group investigated and collaboratively created data, etc. Discovered bug that was already addressed in different release; following releases between named releases is confusing.
 - Friday's RM SIG call - SIG was asking about CUL's ERM implementation and had lots of questions around agreements and attaching licenses to those. Lots left to do in that area.
 - MARC records - Pam provided feedback on what can be improved for those records. Liisa has been making list of databases for which we do not wish to receive MARC records since we receive them from elsewhere OR where we created data for those. EBSCO does not have effective way to mark that you do not wish to receive bib records for specific databases.
 - Was unable to identify a batch process to match Serials Solutions records to those from EBSCO; will need to be a manual process.
 - Expect to receive records at end of February
 - [Jason Kovari](#): write to Leah and Henrik to inform them that batch match won't work but we'll get them a concordance file.
 - Communication plan for CUL-wide concerning
 - Peter will send a message to CU-LIB
 - Spreadsheet/database to track access and data : i.e.: whether we have access to the things for which we pay
 - OCLC still working on new proxy server - issues arose in testing. Sally, Jeremy, Liisa and Peter moving along notifying vendors to add new IP range
- FOLIO-related items to celebrate (recurring agenda topic)
 - ERM library-wide celebration on March 4th; announcement to CUL soon
 - Laura created records in MARCcat; will show this in the CMS meeting tomorrow
- Zoho update - due end-of-February
 - All must do this if you are leading areas of FOLIO implementation
 - Jason & Jenn will touch base on Zoho organization
 - How do we engage staff who are not in Zoho but need to be involved with decision making and follow thru
- LTS FOLIO Workflow change opportunities: <https://cornell.box.com/s/nbu1zwnf4js4zm6027unp8t17o9ma7el>
 - items that have arisen while we talk about ways data is set up in FOLIO – decisions to be made about how we change what we're doing to simplify OR to leverage FOLIO functionality
 - Get these into Zoho
 - Document who have agency/sign-off
 - Set mechanism for people to engage in process (to raise issues / ramifications)
 - Make task list in Zoho, which is reusable
- FOLIO Engagement chart: <https://cornell.box.com/s/b2m00iwqzdwn8chr1dsrnhx4u6itpgxu> : how to share with staff?
 - Last time: each director showed the spreadsheet to their respective groups and then talked it thru with them.
 - Simply sending out email unlikely to be informative
 - Will be put on LTSHeads agenda for March
- Communication:
 - update of Steering Group subgroup meeting (Andy, Darsy, Debra, Jason and Zsuzsa) met to discuss communication around FOLIO. We're very clear that we need work to communicate motivation, etc.
 - People who work in Items and Holdings in units that are not represented in this group (ILR, Annex, etc.) - need method of communicating with them
- OCLC-to-FOLIO development – brief update
 - Index Data returned a quote that was higher than we originally anticipated; shopping around for additional institutions to contribute
- "Lightweight" MARC editor
 - Does not remove development from MARCcat; is a separate dev project to support Summer 2020 implementers
- Other items??
- Future meeting:
 - Jenn/Adam: equipment inventory: how to handle circulating equipment in FOLIO
 - Xin: develop framework for communicating items applicable to LTS (e.g.: LTS Staff Engagement Chart). Let LTS know we are thinking about communication strategy and make it clear that Debra's messages. Group should check with staff

2020-06-08 (LTS)

Attendees: Laura, Jean, Jenn, Adam, Jason, Peter, Jesse

Agenda:

- EBSCO hosting
 - ERM: have not been contacting Peter. Will need us to define that data transfers correctly but also need to know when to stop using our hosted version for the migration. We should pick calendar we want and then CUL should work with EBSCO to make that happen. Peter will check-in with Debra.
 - ILS implementation:
 - Analytics: contract provides access to this tool so we will be using it but for what purpose and Library Data Platform overlap is unclear. Team was formed in CUL Implementation Team today to sort this out. Adam's name was thrown in; Debra will reach out to him. Questions around why the Reporting SIG's work should/could be continued. not unlike knowledge base structure where there are various ways to implement FOLIO (e.g.: pay EBSCO for their KB or use GoKB, etc.)
 - Implementation meetings have been more project management focused since EBSCO started engaging
- Project Management software
 - Wrike being used now that EBSCO involved
 - We have limited access, in a way
 - Distinction between what goes to Wrike and what goes to EBSCO support
 - Sort out the items migrated from Zoho – and how they relate to the Wrike structure added by EBSCO
- CUL-wide "Get Acquainted with FOLIO" sessions postponed. Do we want to have smaller LTS-focused sessions? If so, for whom?
 - Adam: fine with October date given how FOLIO is a moving target. Also the work on revised workflows, etc., and Project GROVER is keeping LTS staff sufficiently busy
 - Jean: agree with Adam. current sandbox is not most current release of FOLIO (will be once we start using EBSCO test beyond the Implementation Team).
 - Jenn: would like to start the Batch group sooner so they can start looking at revising processes and to continue giving feedback while in the development process
 - What about acquisitions? Should those staff engage sooner. Jesse: for most part, better to hold off but want to get some of the managers exposure.
 - Laura: thinking that Cataloging Workflow Managers group should have access sooner so that more can be involved in the
 - Mentorship on how to re-write all of the LTS procedures
 - Bug Fests: Lisa has done these, as has Jean. Jenn signed up for one and planning to hand off to others once she experiences the process.
 - NEXT STEPS:
 - Batch does not need our records loaded. Feel alright moving on with them
 - Jenn and Jean are joining CWM to discuss 948s tomorrow; next month's meeting may continue that if our hosting instance has data in it
 - Jesse will talk to acquisitions leads to get their take
- Other topics

2020-07-13 (LTS)

Participants: Jean, Jason, Laura, Jenn, Peter, Xin, Jesse, Adam

Agenda:

1. Updates (all)
 - a. BugFest: testers encountered many issues and the testing extended. Jean tested some old and some new things, including: setting of permissions; QuickMARC (initially failed all tests executed); DataImport test failed but was then fixed. This is the most advanced version of FOLIO... but was disappointed in performance of QuickMARC (e.g.: edit and see if the edit sticks... change the second indicator in an 856 to see if display changes; did test where imported vendor-sent data and subject headings were rearranged in alphabetical order rather than the original order - reported to AnnMarie.)
 - b. Out of Continuations review, request by some to be able to use FOLIO ERM to look up credentials; can this happen?
 - i. Jesse: worked with Phil who set-up read only account permissions for ERM-only Apps and set up account for Henrik and Leah. Jesse has a dupe of that access permissions to make sure he knows what they can see. Jesse will be training them in the next week or so. Adam would like to be a part of this training to understand how selectors could be self-reliant around this. Earlier thought was to have a super-user in each of the selector teams... not currently a role but might be considered later.
 - c. Xin had 30 minute call with Lucy L (EBSCO-hired FOLIO China colleague) today; she is based in Seattle. Jointly funded by Shanghai Public Library. With FOLIO libraries with which we're partnered, Xin can help build relationships; she already has connections but may have gaps in the academic library realm. Shanghai is providing development and the Director joined the FOLIO board. System performance is one area they are developing.
2. Scope of LTS FOLIO Steering Group: with the majority of the members of this group actively engaged in SIGs as well as CUL's Implementation Group (where primary coordination of tasks is happening), the question has arisen as to what is the scope of this group and what is its purpose. Is this simply a report-back group? OR does this group have a bigger purpose/scope? Today, we will spend time discussing the scope of this group and whether we have next steps/action items in the foreseeable future.
 - a. Jean: part of what we originally set-out to do was keep tech services staff informed of developments in FOLIO. We've talked about that a lot... but are we doing it? Question: what is the FOLIO version of the Voyager Security Team?
 - b. Laura: experience a lot of confusion sorting out what is appropriate for FOLIO implementation team and what is appropriate here. Only difference is that there are some people here who do not attend the CUL Implementation meetings. If not meeting like this, Jean and Adam would not be getting this information
 - c. Jesse: also approaching parts of project that are at implementation committee level that are things Jean, Adam and Xin could potentially be doing. we need to make sure that they are connected. E.g.: training needs to engage Jean as early as possible. Not sure if this meeting does this... but it is a forum/chance to approach this
 - d. Adam: for those more involved in FOLIO, trust you to keep me informed. if you think this one can go away, fine with that.
 - e. Peter: participate in implementation meetings so know whats happening there. so much of FOLIO is LTS related.
 - f. Xin: we don't just come together because AUL and Directors are there... we question why we are doing this. This group is a historical product from long-before we had our current org structure and approach to FOLIO implementation. What would like to see that all staff know when FOLIO will be launched and they are ready for it. how it happens is not as important. We are the sounding board for decisions that affect LTS
 - g. Jenn: maybe when Jean starts training, a new group will form that deals with that part. we don't carry forward action items. it we were making decisions in this group and doing things around the. Access Services was going thru JIRA issues, going thru some settings, looking at some other pieces that turn into settings (e.g.: permissions for circ, calendars, item-type/loan-type).
 - h. Xin: when interviewed staff, lots of people heard: FOLIO is coming but IDK anything about it. Would making some of these decisions inclusively help. Happy to have a different formation to ensure that the end goal is accomplished. From project management perspective, who is the PO for LTS? Is this an SMTG issue?
 - i. Jason: hearing a need for effort / clear gaps but not necessarily one that falls within an area that this group in particular can fill.
3. Other topics?
4. ACTION ITEM / DECISION
 - a. If anyone feels like this group should stay active, write to Jason this week. If nothing arises from that, Jason will write to group next Monday to officially put group into dormancy. Also send to Jason gaps you see that may or may not be accomplished via this group – Jason will then make sure that anything raised goes to CUL-wide Implementation team
 - b. LTSHeads will be asked about gaps they perceive... and we'll bring those to CUL Implementation

Workflow Issues (FOLIO TS Senior Management Team)

General Issues:

1. Should we consider an OCLC Connexion-based workflow for routine processing?

Keeping up with the FOLIO project

To learn about FOLIO at a very high-level...

- Attend the *CUL FOLIO Friday meetings* or [watch the recordings](#) if you miss the meetings—these meetings will be announced by Jesse Koennecke on CU-LIB and will cover timely topics related to FOLIO
- Invite Debra Howell (FOLIO implementation at CUL) or Holly Mistlebauer (FOLIO development/OLE partnership) to speak about FOLIO at a department meeting

To learn a bit more about what is happening...

- Sign up to receive the monthly *FOLIO News Bits* via email [here](#).
- Sign up for the "ole" e-list [here](#) to receive the weekly *OLE Project Report*, which includes a link to the [FOLIO Project Updates](#) from folio.org.

To get even more involved...

- Contact a [CUL FOLIO Implementation Team member](#) in your department to find out from them how you can be more engaged
- Attend *FOLIO Forums* of interest, which are announced in the weekly OLE Project Report (see signup instructions above) and *FOLIO News Bits* (see signup instructions above) plus at the [folio.org events board](#) (or watch the recordings, which are [available on YouTube](#))
- Check out the [CUL FOLIO Implementation Team wiki](#) for meetings notes, documents, a link for reporting anonymous questions, links to FOLIO demo sites, etc.
- Check out the [FOLIO project wiki](#) for information about Special Interest Group (SIGS), links to important documents, meeting notes, etc.

Reporting Stakeholders Team

CUL Data Migration Team (Draft)

Sharon Beltaine (core)

Nancy Bolduc (core)

Adam Chandler (collection development, data privacy and security)

Carol Clune (collection management)

Jenn Colt (batch processing, data migration)

Ann Crowley (accounting)

Jessa Edwards (reserves)

Caitlin Finlay (ILL and Borrow Direct)

Andy Horbel (resource access)

Joanne Leary (core)

Peter Martinez (batch processing)

Lisa Maybury (acquisitions, serials)

Peter McCracken (ERM)

Leah Rae McEwen (collection development)

Linda Miller (assessment) (core)

Fred Muratori (collection development)

Jean Pajerek (core)

Michelle Paolillo (DSPS)

Natalya Pikulik (core)

Phil Robinson (integrations)

Vandana Shah (core)

Heather Shipman (collection data analysis, ERM)

Laura Daniels (cataloging)

Cammie Wyckoff (collection management, annex)

Charge (Draft)

The Reporting Stakeholders Team will provide central coordination for reporting functionality in FOLIO in conjunction with business owners, report consumers, and other subject matter experts from across the library's administrative units. Membership is drawn from staff members across the Cornell Library.

The group will:

- Review and prioritize FOLIO report and reporting feature development for Cornell
- Communicate about report development status and issues to appropriate business owners and subject matter experts on a regular basis
- Work with functional area owners to further define, understand, and document reporting requirements for Cornell
- Participate in report development and testing
- Provide feedback to the FOLIO community on community reporting tools

Reporting Team Meeting Agendas and Notes

- (Date) Reporting Team Meeting Agenda & Notes
 - introductions
 - review reporting requirements
 - in-app reports
 - data warehouse reports
 - review project plan for reporting
 - review and update reporting charge
 - we are relying on reps to bring in others from their areas for review as needed
 - meetings will be topic-focused

Reporting Links

[CUL Reporting Project Tasks](#)

[Reporting SIG Wiki](#)

[CUL Reporting Issues in FOLIO JIRA](#)

[FOLIO JIRA Reporting Issue Filters](#)

[Reporting SIG Master Spreadsheet \(view only\)](#)

[Connecting to the CULLDP Data Warehouse](#)

[Report Inventory](#)

Connecting to Reference LDP from DBeaver

The Reference Library Data Platform (LDP) is the FOLIO Reporting SIG's shared test LDP database. This database is used by reporting developers in the FOLIO community for the collaborative development of queries for the FOLIO Analytics report repository.

Steps to access the Reference LDP database using DBeaver

1. Open DBeaver
2. Under the Database menu, choose New Database Connection
3. In the Select your database window, choose PostgreSQL and click Next
4. Enter the following into the appropriate fields for Connection Settings
 - a. host: glintcore.net
 - b. port:5432
 - c. database: folio_snapshot
 - d. username: ldp
 - e. password: (contact Sharon Beltaine)
 - f. SSL mode: require
5. Click Finish

Report Inventory



Resource Access				
REP	Title	Cluster	Needed By	Status

Metadata Management				
REP	Title	Cluster	Needed By	Status
REP-18	HathiTrust Print Holdings	MM-External Holdings Cluster	can wait - up to a quarter after go-live	in development

Resource Management				
REP	Title	Cluster	Needed By	Status
REP-9	Usage Data from electronic content providers	UXPROD-2494 ERM- Cost by Provider for Usage	go live	
REP-228	Number of serial titles currently received	UXPROD-2398 RM-Subscription Count Cluster	can wait - up to 1 year	
REP-82	Invoice report (with order data)	UXPROD-2301 RM-Invoice Cluster	can wait - up to a quarter after go-live	
REP-83	Invoice report (with bib data)	UXPROD-2301 RM-Invoice Cluster	can wait - up to a quarter after go-live	

Other

REP	Title	Cluster	Needed By	Status

Tableau: Connecting to the CULLDP Data Warehouse

CURRENT STATUS - NEED TO BE UPDATED

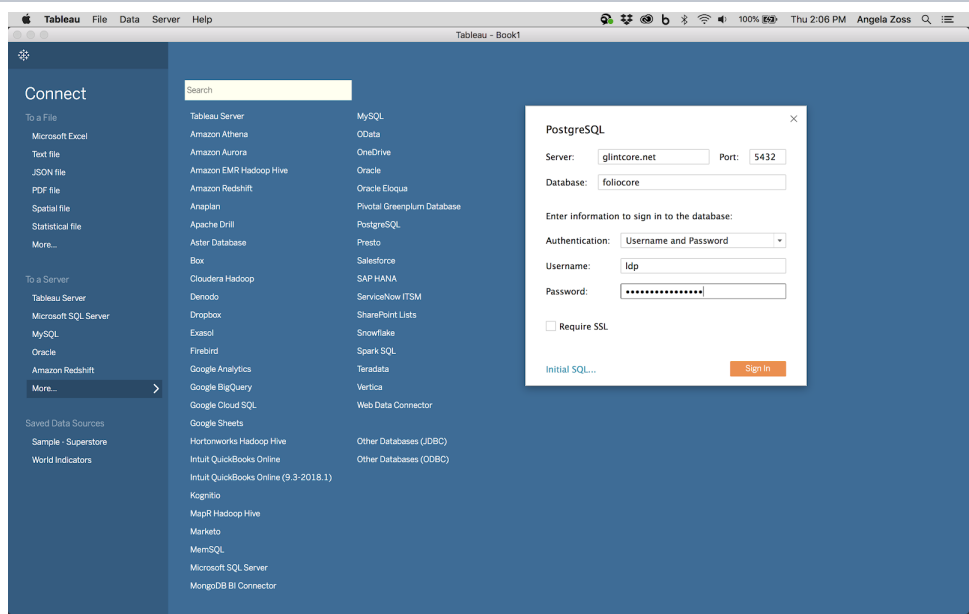
The CULLDP Data Warehouse supports FOLIO reporting for Cornell University Libraries. These are instructions for connecting to the data warehouse from Tableau.

Connecting from Tableau Desktop

1. Start Tableau Desktop
2. From Connect, then To a Server, then More, select PostgreSQL
3. Enter connection details
 - a. server: (server address)
 - b. port:5432
 - c. database: culldp
 - d. authentication: username and password
 - e. username: ldp
 - f. password: (see Sharon)
 - g. check the box next to "Require SSL"
4. To Run Custom SQL
 - a. Select "New Custom SQL" from sidebar
 - b. Paste in single SQL statement, but do not include trailing ";" (Tableau is unable to create a view, even a temporary one, but it can read from an existing view)
 - c. Note: It is possible to join custom SQL to other existing tables in the database, which might be necessary if you can't accomplish everything in a single SQL statement
 - d. See also: [Tableau documentation on custom SQL](#)
5. To create a Data View
 - a. Click Sheet 1, bring over Dimensions and Measures, complete joins
 - b. Under Server, choose Publish Workbook
 - c. Click Publish without Extract
 - d. Log in to the LDP
 - e. Under Data Sources, click Edit and Embed all passwords
6. To see results on Tableau Server
 - a. Go to tableau.cornell.edu
 - b. Choose Explore
 - c. Choose libr - folio

Connecting to Data Warehouse

- Start Tableau Desktop
- From Connect ... To a Server
- ... More... select PostgreSQL
- Input connect on details



Executing Custom SQL

- Select "New Custom SQL" from sidebar
- Paste in single SQL statement, but do not include trailing ";"
 - Tableau is unable to create a view, even a temporary one, but it can read from an existing view

Note: It is possible to join custom SQL to other existing tables in the database, which might be necessary if you can't accomplish everything in a single SQL statement

See also: [Tableau documentation on custom SQL](#)

The top screenshot shows the Tableau interface with a custom SQL query entered in the 'Edit Custom SQL' dialog box. The query is as follows:

```
select *
  from v
 union all
 select *,
        'total_for_patron_group',
        sum(faculty),
        sum(graduate),
        sum(staff),
        sum(undergrad),
        sum(total_for_library)
  from v
```

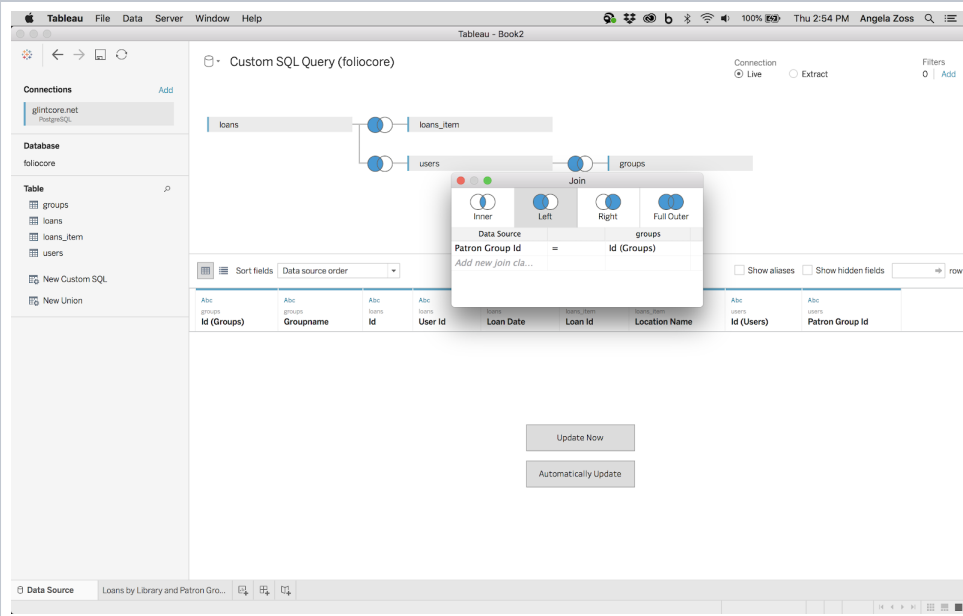
The bottom screenshot shows the resulting data table in Tableau. The table has the following structure:

Alias	Table	Faculty	Graduate	Staff	Undergrad	Total For Library
2017-01-01-2018-1...	Annex	2.00000	1.00000	2.00000	null	5.00000
2017-01-01-2018-1...	Main Library	5.00000	13.00000	1.00000	13.00000	32.00000
2017-01-01-2018-1...	SECOND FLOOR	1.00000	2.00000	null	null	3.00000
	total_for_patron_g...	8.00000	16.00000	3.00000	13.00000	40.00000

Building Queries In Tool

Tableau gives direct access to database tables, so tables can be joined ad hoc in the tool

- Drag tables one by one into data source canvas, but note that order matters: Tableau tries to determine joins automatically by table contents, hard to fix later
- Can adjust whether Tableau uses left /right /inner /outer join by clicking on the Venn diagram between the tables



Viewing and Saving Results

Basic Data Export to CSV

Immediately after executing the query, a user can use the Data menu to export results to a .csv file, which could then be opened in Excel or another data analysis program.

Formatting note: Tableau adds a "Number of Records" column automatically and may reorder other columns alphabetically, so the exported CSV may not match the Tableau table.

The screenshot shows the Tableau Desktop interface. The 'Data' menu is open, and 'Export Data to CSV' is highlighted. Below the menu, a data table is visible with columns: library, faculty, graduate, staff, undergrad, and total_for_library. The data is as follows:

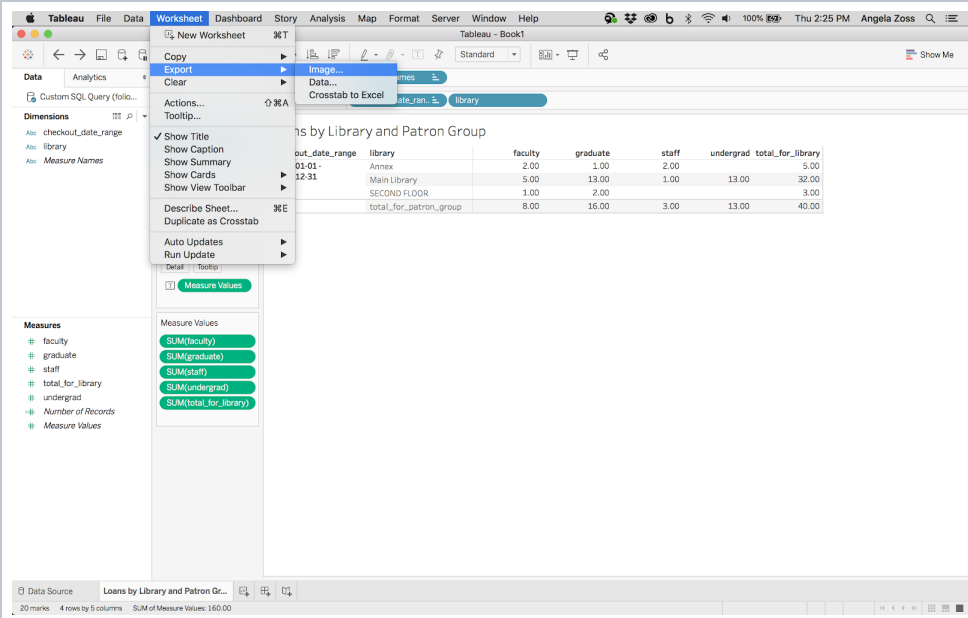
library	faculty	graduate	staff	undergrad	total_for_library
Annex	2.00000	1.0000	2.00000	null	5.0000
Main Library	5.00000	13.0000	1.00000	13.0000	32.0000
SECOND FLOOR	1.00000	2.0000	null	null	3.0000
total_for_patron_gr...	8.00000	16.0000	3.00000	13.0000	40.0000

Below the Tableau table, an Excel spreadsheet is shown with the exported data. The 'Number of Records' column is added at the beginning of each row. The data is as follows:

Number of Records	library	faculty	graduate	staff	total_for_lib	undergrad
1	Annex	2	1	2	5	1
2	Main Library	5	13	1	32	13
3	SECOND FLOOR	1	2	0	3	0
4	total_for_patron_gr...	8	16	3	40	13

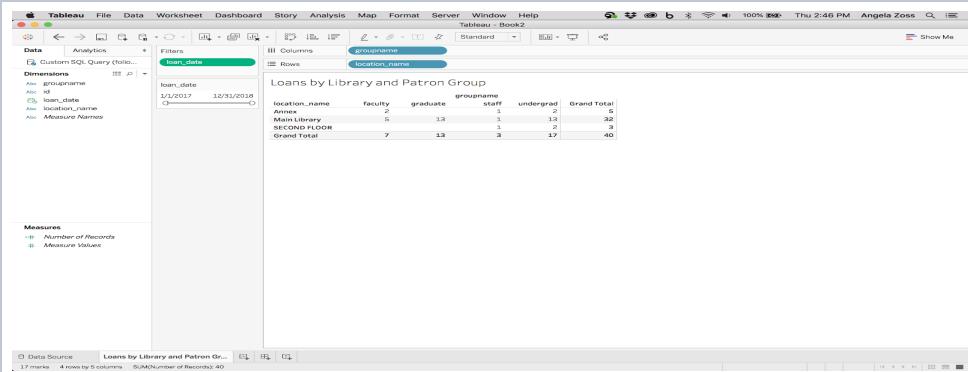
Export Worksheets

If you create a visualization based on the data from the query, Tableau Desktop will also allow you to export that visualization (either in a worksheet or in a dashboard) as an image (.png, .bmp, or .jpg format). You can also print worksheets and dashboards to PDF. You can also export just the data used in a particular worksheet from the Worksheet menu.



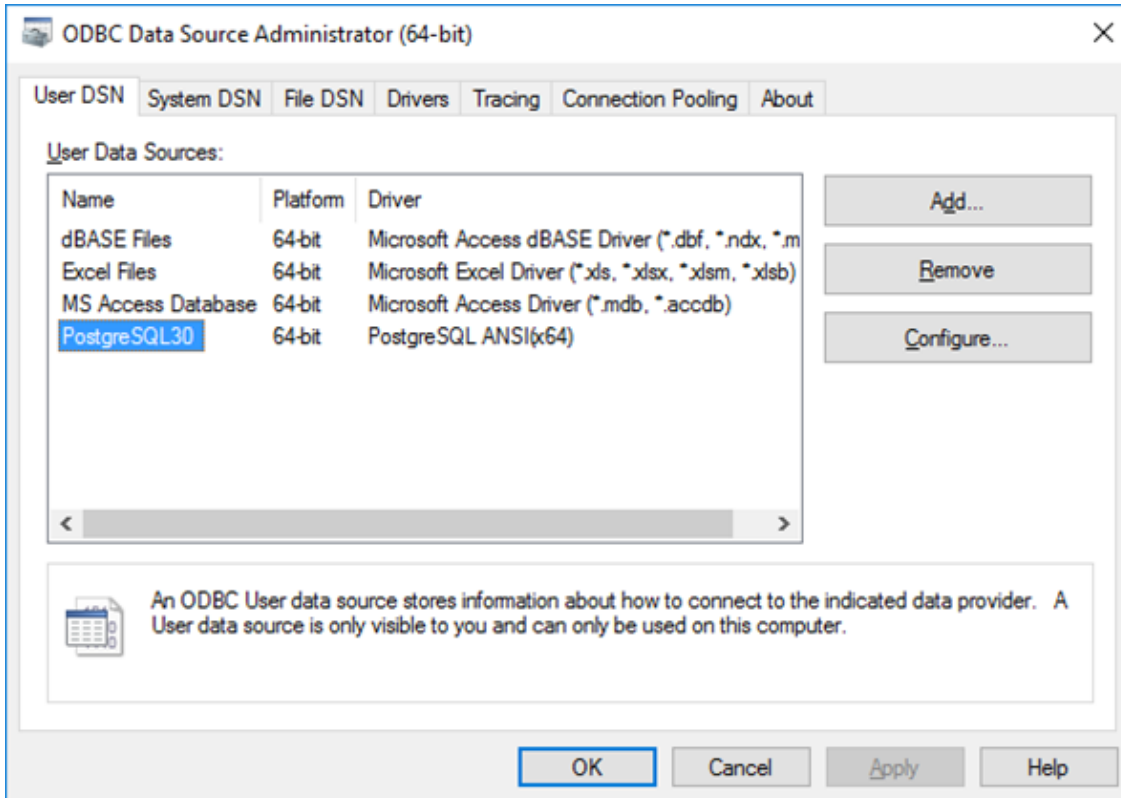
Custom Reports from Results

Tableau is designed to create visualizations, including both tables and charts/graphs. Tableau can easily add totals and subtotals, filter out certain groups or date ranges, create custom groups, change the names of variables and data points, etc. It may be possible or even advisable to generate custom visuals in Tableau rather than using a SQL query to perform aggregations and add formatting. You can either join the tables directly in Tableau or use custom SQL to join tables and select specific columns.

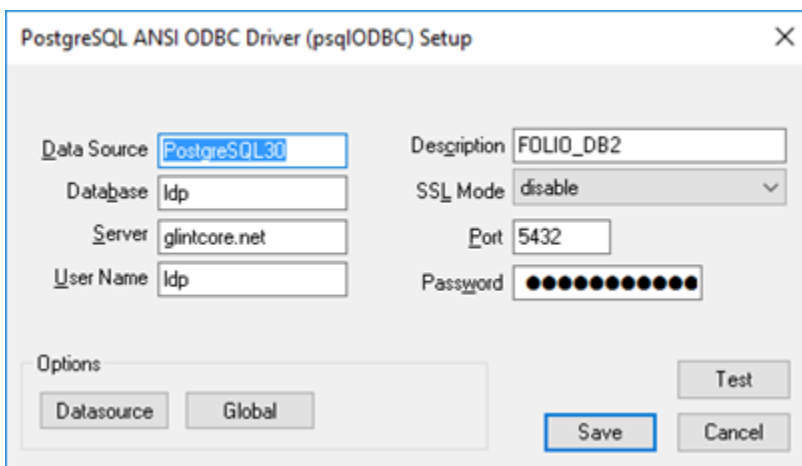


Connecting from Microsoft Access

1. Set up new ODBC data source in Windows:
 - Navigate to Control Panel\All Control Panel Items\Administrative Tools
 - Select the appropriate "ODBC Data Sources" link (32 or 64-bit)

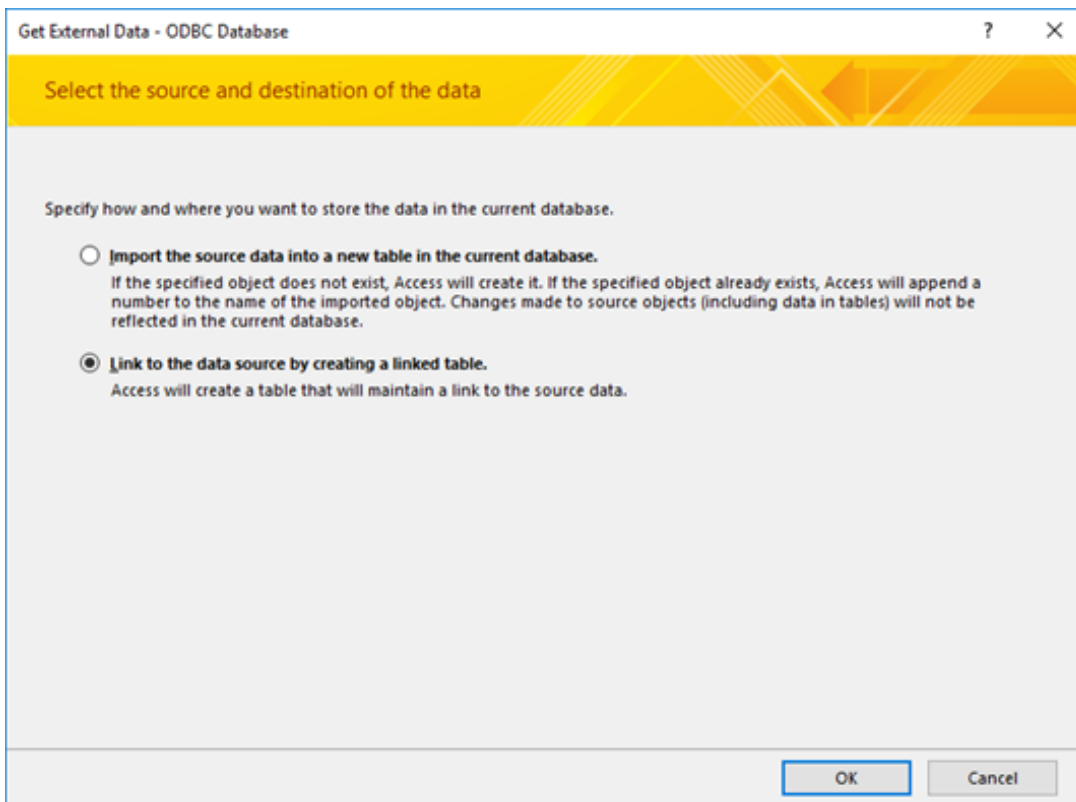


- Click "Add"
- Choose "PostgreSQL ANSI..."
- Enter connection details and test connect. If connect is good, click "Save"
- **Note that the screenshot below shows the SSL Mode setting as "disable". This is incorrect. SSL Mode must be enabled in order to connect successfully to the CULLDP database.**

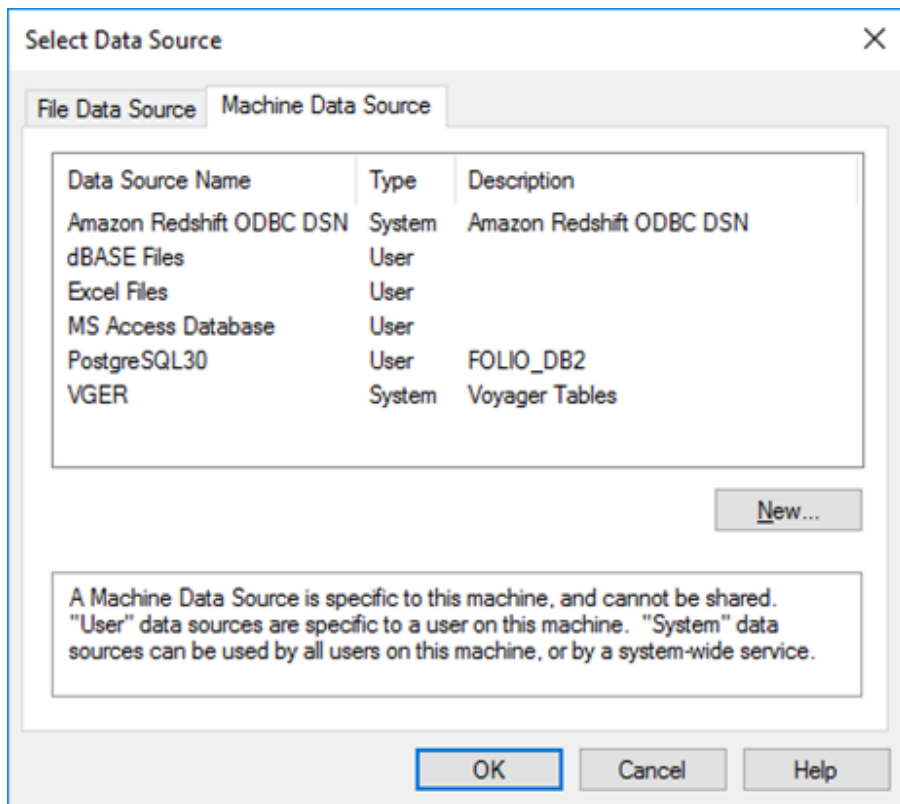


2. Open Access

- Create a new "Blank desktop database"
- Close the empty table that has been created by default.
- Click "External Data" in the top menu
- Click "ODBC Database"
- Choose "Link to the data source by creating a linked table" and click "OK"



- In the “Select Data Source” window that opens, click the second tab found at the top of the window (“Machine Data Source”). This will give you access to the system-level ODBC connection you created earlier.
- Choose the appropriate connection.
- In the next window that opens, click the “Select All” button on the right, click the “Save password” box so that it is checked, and click the “OK” button.
- A series of dialog boxes will open that tell you the remembered password will not be encrypted within the file. Click “Save Password” in each window.
- MS Access will ask you to identify the Unique identifier (primary key) for each table you bring in



You should now be connected to the Data Warehouse and can create queries.

Using Git Plugin for DBeaver with the FOLIO-Analytics Git Repository

DBeaver Git Plug-in

The Git extension for DBeaver is linked from this page: <https://dbeaver.com/docs/wiki/Eclipse-extensions/>

Using the Git Plug-in

The Git plug-in makes a 3rd copy of the Git repository, so this requires merging twice.

The first merge from DBeaver to Git is called a Push.

The second merge is from your branch in Git to the Folio-Analytics master branch.

Do your code merges on the web interface to GitHub.

Installing the Git Plugin for DBeaver

Step 1: Update DBeaver

Make sure you are running the latest version of DBeaver.

Under the "Help" menu in DBeaver, select "Check for updates" to make sure you have the latest version.

Upgrade if you do not have the latest version.

Step 2: Install the Git Plugin

Install the Git plugin

Under the Help menu, choose Eclipse Marketplace. Search for "egit."

There is a box in the bottom right corner of the Egit item that will show "Install" or "Installed."

If you or someone else installed the Git Eclipse plug-in while installing DBeaver EE, then it will show as "Installed."

If it still says "Install," you may need to contact Desktop Services to have the plug-in installed, as it requires admin access.

For more information, see this page: <https://dbeaver.com/docs/wiki/Eclipse-extensions/>

Step 3 : Clone the GitHub Repository

In the DBeaver EE icons at the top of the window, choose the dropdown menu next to the "Git" icon and choose Git Repositories.

Choose "Clone a Git repository" and enter this address into the URI field: <https://github.com/folio-org/folio-analytics>

Under Authentication, enter your GitHub username and password.

Click Next. Choose the branches you want to clone.

Click Next. Click Finish.

Usability/Accessibility

Overview

Usability evaluations of various aspects of our FOLIO implementation will provide feedback regarding potential areas for improvement as well as insight into what is working well for users.

Process

We began with a review of the different functional areas of FOLIO to get a preliminary idea of in which areas we can begin user testing. We will work with practitioners/representatives from these areas and the Usability Working Group to define tasks, conduct tests, gather feedback, and report back out to our Cornell as well as the larger FOLIO community.

Meeting notes

- Circulation and Access Services
 - [Initial meeting](#)
 - Task development and meetings with Usability Working Group
 - [Initial tasks draft](#)
 - Initial meeting with usability working group included [here](#)
 - [Meeting with Usability Working Group](#)
 - [Usability working group](#) FOLIO test details
 - Includes notes from review of tasks/initial walk-through by access participants
 - [Circulation user roles/permissions](#) (screenshot of circ test user in Cornell FOLIO instance)
 - [Usability Test Results](#) (Thank you Usability Working Group, [Tobi Hines](#) and [Kevin Kidwell](#))
- Metadata Management
 - [Original task drafts folder](#)
 - [Notes from discussions](#)
 - [Usability Report](#)
- ERM
 - [Initial meeting](#)
 - [Group meeting 03/12/ 2020](#)
- Resource Management
 - [Running notes](#)
 - [Tasks](#)
 - [Usability results](#)
- Additional areas/recommendations for evaluation and testing
 - [Keyboarding survey](#)

References/Related Resources

[CUL FOLIO Implementation Project](#)

[Main FOLIO Wiki](#)

[FOLIO Accessibility and Usability SIG](#)

[Voyager tests/review used to generate initial tasks for circulation testing](#) (requires Box permissions)

Prototypes/implementation instances

- [Cornell FOLIO implementation](#)
- [FOLIO AWS Snapshot](#)

Issues and project tracking/management

- [Usability Task List \(ZOHO\)](#)
- [Place to collect usability feedback \(ZOHO\)](#)
- [Development issues for CUL devs](#)

Resource Management Usability Tasks (provided to Usability Working Group)

[Link to original Google doc](#)

URL: <https://cornell-training.folio.ebsco.com/>

Login: (Was provided)

PW: (Was provided)

Goals for testing:

- Navigation (within and across apps).
- Can people perform their tasks using the interface?
- Challenges and opportunities for improvement?

Note: For testing purposes, **any numbers in brackets like [1]** equal the participant number.

Acquisitions

Monograph

- You have to create a purchase order for the book "ICARDA-Caravan [1]" provided by ICARDA. The order should be billed and shipped to LTS Acquisitions. We expect to pay \$100 for the book and to charge it to fund "310 Sciences". Please use the template "Monograph Order (LTSMono)" for this purchase order.
- You may now approve and open the purchase order you created in the previous step.
- Find and note the PO Number.
- You have approved the purchase order. Please input and process the provided invoice for "ICARDA-Caravan [1]" from ICARDA. -
 - Link to Invoice (should be made available to the participant): https://docs.google.com/document/d/1foxw7SIhX4rCv362M0g8C2Mj_GerwFQLEkxaOLcxy1A/edit?usp=sharing
- You have confirmed that what was ordered has been received in expected condition. Complete receiving the order for "ICARDA-Caravan [1]" from ICARD.
- Ensure that you can find "ICARDA-Caravan [1]" now in the available resources in the library.

Serials

- You are receiving the order for the new issue (issue [1] (2021)) for Journal of the International Association of Buddhist Studies from EBSCO. Please check in this new issue.

eHoldings

- Add the title "Crustaceana" to the package "Brill Journal Online Collection - Biology" from the provider "Brill".
- Add the package "Engineering for Medicine and Biology Journals" from the provider "American Society of Mechanical Engineers (ASME)" to holdings.
- Add coverage dates of 2020-01-01 to 2023-01-01 to this package.
- Remove the title "Collection of papers by William Thornton Parker" from the package "The American West" from the provider "Adam Matthew Digital Ltd."
- Remove the package "Ebsco eBooks" from EBSCO from holdings.

Title, package information listed below for other participants. Data for the tasks or that might change between participants is highlighted in blue.

Participant	eHoldings Task/Data
2	<ul style="list-style-type: none"> • Add the title "IAWA Journal" to the package "Brill Journal Online Collection - Biology" from the provider "Brill". • Add the package "Oxford University Press Journals (VIVA)" from the provider "Oxford University Press" to holdings. • Add coverage dates of 2020-01-01 to 2023-01-01 to this package. • Remove the title "A day with the cow column in 1843" from the package "The American West" from the provider "Adam Matthew Digital Ltd." • Remove the package "Consumer Health Reference eBook Collection" from EBSCO from holdings.

3	<ul style="list-style-type: none"> • Add the title “Seeing and Perceiving” to the package “Brill Journal Online Collection - Biology” from the provider “Brill”. • Add the package “IMechE Journals (JISC)” from the provider “Sage” to holdings. • Add coverage dates of 2020-01-01 to 2023-01-01 to this package. • Remove the title “A descriptive sketch of the Spirit Lake region (northwestern Iowa)” from the package “The American West” from the provider “Adam Matthew Digital Ltd.” • Remove the package “eBook History Collection (EBSCOhost) - North America” from EBSCO from holdings.
4	<ul style="list-style-type: none"> • Add the title “Contributions to Zoology” to the package “Brill Journal Online Collection - Biology” from the provider “Brill”. • Add the package “Royal Society of Medicine Press” from the provider “Sage” to holdings. • Add coverage dates of 2020-01-01 to 2023-01-01 to this package. • Remove the title “A vocabulary of the Snake or Shoshone dialect” from the package “The American West” from the provider “Adam Matthew Digital Ltd.” • Remove the package “Science Reference eBook Collection” from EBSCO from holdings.
5	<ul style="list-style-type: none"> • Add the title “Insect Systematics & Evolution” to the package “Brill Journal Online Collection - Biology” from the provider “Brill”. • Add the package “Sage Premier Journals (EIFL)” from the provider “Sage” to holdings. • Add coverage dates of 2020-01-01 to 2023-01-01 to this package. • Remove the title “A journal of the overland route to California, and the gold mines” from the package “The American West” from the provider “Adam Matthew Digital Ltd.” • Remove the package “Biomedical Reference Collection: Expanded” from EBSCO from holdings.

Additional titles for adding title to package: Animal Biology, Multisensory Research

Integrations

The current list is at [the CUL Implementation Project's Box site](#) .

Meeting Notes - Patron-User Import

- [2020-05-22](#)
- [2020-05-28](#)
- [2020-06-12](#)
- [2020-06-26](#)

2020-05-22

Kickoff meeting.

Attendees: CIT Integration team (Steve Barrett, Preslava Staneva); EBSCO (Theodor Tolstoy, Alex Soto, Anya Arnold), CUL-IT (Robbie Douglas, Phil Robinson)

Regrets: Jeff Christen, CIT

- Round of introductions
- Goals of this meeting
 - Overview of the requirements to refresh user data automagickally
 - Who will need access to what in FOLIO for this to go forward? How do we give CIT and EBSCO the API access they need?
 - Integrationeers' thoughts on possible approaches to providing the data
 - Theodor's take on his experience loading user data into other libraries' FOLIO tenants
- Theodor presented a few slides to set the stage
- We may have Notes in Voyager for users to bring over into FOLIO
- Fees/Fines that are brought over need matching user IDs
- Open loans as well
- Where to keep external users' passwords? They can't do it out of the box in FOLIO. They may be baked into Blacklight (guest ID you register for).
- Would we only feed the deltas? Could we?
 - Who owns / runs it? CIT - PeopleSoft team and Production Control
- Decision: Pull initial user data from Voyager. Voyager has proxy/sponsors and edternal folks not in the automated feed.
 - Notes /blocks are also attached to the user.
 - U Alabama is also on Voyager, and also an EBSCO customer for FOLIO. Patty is Product Owner of the User Mgmt SIG
 - Chris Manly had chartered the original FOLIO User Mgmt group.
- User blocks need to be brought over; what kinds of blocks do we have? Mapping to be done
- Need to deal with people with multiple roles (a retiree and a grad student)
 - Voyager has hierarchical permissions - in FOLIO you can only have one barcode per active User. Other schools have "smooshed" them together. TAMU and Alabama ex.
- Review where we are with the EBSCO tenant env'ts and where we eventually want to be
 - Test, Training, Prod.
 - Versions of FOLIO - Edelweiss on Prod, Fameflower (just came out) for the others
 - Theodor - are there significant differences in the mod-user-import or other APIs relevant to this?
 - Need the legacy user IDs to bring over old loans etc and map them in FOLIO. Could use barcode (= EmplID) or NetID.
 - We have a self-hosted FOLIO populated with only ERM users, not patrons.
 - Voyager has tons of user data; we forwarded sanitized examples of it to Theodor for reference.
- "users" vs "patrons"
- Self-checkout: SIP2 protocol or NSIP are most common. They have protocols to identify the user, make requests, etc.
- Discussion of how SSO is stitched together at Chalmers U etc. External ID mapping.
 - FOLIO acts as a SAML Service Provider. Hook it up to our central IDP.
 - External users can use username/password to bypass SSO.
 - OpenAthens can act as a plugin for SAML AuthN (Chalmers uses it thus)
 - There's pressure for FOLIO to be its own IDP, but it isn't yet.
 - Login screen - user chooses SSO or external login
 - SimpleSAMLphp is a simple wrapper to be a SAML IDP (identity provider)
- Need to define future meetings / topics
 - OPAC / Blacklight folks would be good
- Boomi team - Boomi is great at importing APIs. TAMU is using Mulesoft.
- Get in touch with Hong Ye re: Shib and SAML and hooking it up

2020-05-28

Meeting with members of the Discovery & Access team; the CIT Integration team; EBSCO; Robbie Douglas from CUL-IT Library Systems

- Per below, we agreed to invite Andy, Wendy, Caitlin, etc from Public Svcs / Access Svcs to an upcoming meeting
- Discussion of Edge APIs for external web services connectivity, a layer away from the okapi API
- We discussed external system IDs, user IDs, Blacklight hooks,
- and mentioned ILLiad (Atlas), BorrowDirect, self-check
 - Which IDs do they need?
- Public or community users? How are they handled? How should they be handled? Chalmers uses OpenAthens federation in SAML
 - Who should we ask in CUL about that? Guest Login? Visitor Privs? Andy / Wendy - Pubic Services
 - How do they add borrower privs? Is it manually entered into Voyager by staff?
 - How would we like it to work in the future?
 - Currently: at <https://newcatalog.library.cornell.edu/myaccount/login> For questions about obtaining a GuestID, email libpublicservices@cornell.edu. - myaccount - takes them directly to Voyager.

RTAC = "Real-Time Availability Check" - checks for availability of a resource for a patron (EBSCO Discovery Svc originally). Patron Empowerment = like an older OPAC

- Some questions came up in the last patron/user feed meeting about how patrons would interact with FOLIO, directly or indirectly. The D&A folks walked us through some of the common user interactions with Blacklight. Is it keyed on barcode (empIID) or NetID?
- Frances - BL Solr indexes - no patron ID there
 - Some parts use NetID, some use barcodes.
- Matt C:
 - Patron info is handled by an import of some sort - CGI scripts - ILL lookups. Who specializes in the import? Ric or John Cline
 - Do they ever go directly go to Voyager? No, all through BL
 - The catalog and request services look at patron info, ILL requests, BD requests, regular requests
 - Which ID do they use?
 - The user logs into Blacklight via Shib CU
- Next steps
 - integrating Blacklight / Solr with FOLIO data
 - What the integrationeers think about how to supply the data

FOLIO mod-user-import API:

<https://github.com/folio-org/mod-user-import>

2020-06-12

- Attendees: Caitlin Finlay and Wendy Wilcox from Access Services, CIT Integration team members, EBSCO, Library Systems at CUL-IT.
- This meeting focused on Atlas ILLiad and interlibrary loan, BorrowDirect / Relais / D2D, self-check, and provisioning non-Cornell patrons in our systems.
- ILLiad has SSO, but patrons have to self-enter their info. We would like to auto-provision that in the future.
- ILLiad has a lending web form option, which is intended for institutions etc who don't use standard ILL. Not intended for community members.
- Right now there's no direct link between ILLiad and Voyager. Things are checked out in ILLiad, not in Voyager. Staff manually check out in two systems - ideally we'd want one step.
 - It's not a top priority, but it would be really great. Let's add this as a FOLIO Jira ticket - checkin/checkout and inventory overlap.
 - The FOLIO SysOps wiki has a list of integrations - a number of ILLiad libraries (U Alabama etc, maybe 5 Colleges)
 - Maybe CU could help bring this forward and work on it with them. Maybe CIT's integration team could assist.
 - Anya has a lot of background in ILL
- Borrow Direct - ReLais / Z39.50 search across the catalogues - could be a model for what we want for ILL.
 - The patrons are most likely NCIP
 - The central technical person is James Robinson.
 - Contact info: PALCI Member Services Coordinator james@palci.org 215-567-1755 ext. 3
 - A patron can make a request 3 ways:
 - Using our Blacklight catalog (it decides where to direct the patron - BD or ILL etc).
 - Patrons can use WorldCat Discovery, but they need to decide which option to pursue.
 - Patrons can also log into ILL or BD directly (using our Shib authN)
 - When we lend in BD to the 13 institutions, every BD inst'n has a "card" in Voyager. They check out in ReLais, not in Voyager. Every request has a number, starting with a three-letter code identifying the library. We have a program that syncs the checkouts in the two systems. Maybe Relais set that up.
 - What's the program? Maybe Relais, if using NCIP, could create the record in FOLIO moving forward.
 - When we borrow in BD, we scan the request # into Relais, and it creates a small item record (a stub) in Voyager that's locked down to staff only. Then CUL has to go into Voyager to put the hold on the book or deliver it to its hold location. zBorrowDirect is its own location. The Relais request # is used as the barcode.
 - So the main thing for the FOLIO team is to make sure the Blacklight integration is solid, with our tenants
 - We're one of the first BL libraries implementing FOLIO
- Caiasoft / Annex question - Patty offered to be the PO on that integration
 - ILLiad has an add-on for Caiasoft
- Self-check - Bibliotheca - Law Library has it
 - There was an issue in other FOLIO libraries over the PINs (4 digit number) used to check out in SIP
 - Bibliotheca does offer full passwords as an option
 - Self-check is something we may get more involved in later on
 - Do we use open shelf holds? Not that we know of, but like self-check, it might gather steam as fewer people would have to touch an item. Yale has that.
- Non-Cornell patrons? Generate barcodes, with a physical card. SUNY patrons, Ithaca College / reciprocal programs, BD libraries (could that be leveraged for those schools)
 - Staff do manual entry into Voyager, giving them a barcode
 - They have to generate a Cornell Guest ID
- Systems for helping with stacks work? Nope just paper and pencil
- Should BD have an interest group in FOLIO? Stanford might be interested?
- ReShare under OLF

2020-06-26

Meeting with Phil, Theodor, Steve Barrett, and Preslava re: connecting Boomi to FOLIO Test

- pss85, smb1 - granted them broad access to <https://cornell-test.folio.ebsco.com/>
- Theodor is on vaca - all of July
- dev.folio.org has lots of docu on FOLIO APIs
- Discussion of the Edge API and mod-users
- Steve and Preslava can use their creds to generate tokens
- Gave them the Okapi URL
- Theo: use your browser's Developer Tools feature to view the post URLs etc. There are tokens in the HTTP header like x-okapi-url and x-okapi-tenant
- Theo uses Postman to interact with Okapi calls (www.postman.com) - API client, testing tools, endpoint simulation / mockups
- use mod-user-import to process batches of users. Basically an upsert.
- Make a Boomi user account for this feed: integration_user_import (later on, add integration_accounting or whatever etc).

Project GROVER - Getting Ready for Optimal Validation of Electronic Resources

Introduction & Overview

Welcome to Project GROVER. Project GROVER is our project within both the eResources team and the FOLIO Implementation Team to implement the initial ERM tools in FOLIO, using EBSCO knowledgebase resources. We will be shifting many of our tools from ProQuest's electronic resources management tools to FOLIO's ERM tools, and will be shifting knowledgebase management from ProQuest's tools to EBSCO's. While doing this, we aim to review and improve what and how we track, regarding our electronic resources.

This document aims to provide an overview of the work we'll do, and serve as the primary source for information about the project, both for those involved with it, and for those seeking more information about it.



Links

[Current Status of EZproxy Access Issues](#)

[CUL FOLIO Implementation Wiki](#)

[FOLIO Zoho Project Management Track \(Zoho login required\)](#)

[EBSCO Admin Interface](#)

FOLIO Instances:

Selected Instances	Notes
FOLIO FOLIO FOLIO FOLIO	***FOLIO ERM PRODUCTION SERVER*** This is our active interface for editing EBSCO admin via the FOLIO eHoldings app, and the FOLIO interface. This is our LIVE, PRODUCTION SERVER – changes here will affect access to electronic resources for Cornell patrons. Rebecca has created a FOLIO Functionality Wishlist , in Box. Please add to it as you see fit.
FOLIO ERM Development Server	FOLIO ERM DEVELOPMENT SERVER This instance is connected to the EBSCO sandbox for eHoldings, and can be used for exploring and testing how licenses, agreements, holdings, and other parts all work together in the FOLIO environment. This is all development; changes here will not affect access for Cornell patrons. At the same time, work done here may be changed by others, or may be lost completely, without any notice at all. Use your NetID for username & pwd, then change your password after logging in.
Snapshot Stable	On AWS, thru Index Data. Use Chrome Login diku_admin / diku tho these aren't working as of 8/7, for PMC.

Goals; How Do We Define Success?

Our goals for Project GROVER are as follows:

- Transition knowledgebase management from ProQuest to EBSCO
- Transfer electronic resources management information from Intota to FOLIO
- Implement EBSCO's tools by January 1, 2020

The project can be considered a success when all of the following tasks have been completed. Ideal deadlines are included for each task:

- EDS replaces Summon in the public-facing Blacklight implementation and all public-facing websites (by Jan 10, 2020)
- EBSCO's Full Text Finder replaces ProQuest's 360 Link as the sole link resolver in all databases and through all CUL tools (Jan 10, 2020) – NB: will this require a change within each database that has outbound OpenURL links? No; most (all?) have a PURL, so we'll just need to change the PURL once.

- EBSCO's A-to-Z list replaces ProQuest's A-to-Z list at erms.library.cornell.edu (Jan 10, 2020)
- A tool and guideline (most likely via a database) has been created for checking and updating all electronic resources over the next 18 months (Sept 15, 2019)
- If selected and approved, a different off-campus access path (currently leaning to hosted EZProxy, but that could change) is implemented (August 20, 2019) – NB: this should be done early so that we can incorporate testing and changes in the checking process. I think.
- If selected and approved, an IP management solution is fully implemented (currently leading toward IP Solutions?): specifically, we are actively using the solution; we are telling vendors to get IP sets from them, etc. (August 20, 2019) – NB: also do early so we can incorporate testing and changes into checking process
- A non-Intota solution stores vital information about license limitations, such as concurrent user limits, in a resource that the catalog can use, until we are able to use FOLIO directly (October 31, 2019?)

- 1 [Introduction & Overview](#)
- 2 [Links](#)
 - 2.1 [Current Status of EZproxy Access Issues](#)
 - 2.2 [CUL FOLIO Implementation Wiki](#)
 - 2.3 [FOLIO Zoho Project Management Track \(Zoho login required\)](#)
 - 2.4 [EBSCO Admin Interface](#)
 - 2.5 [FOLIO Instances:](#)
- 3 [Goals; How Do We Define Success?](#)
- 4 [People – Participants, Contacts, other](#)
 - 4.1 [Team GROVER:](#)
 - 4.2 [Internal Contacts/Liaisons:](#)
 - 4.3 [External Contacts:](#)
 - 4.4 [Timeline](#)
- 5 [Subgroup Projects](#)
 - 5.1 [Tracking Database](#)
 - 5.2 [Intota to FOLIO ERM](#)
 - 5.3 [MARC Records](#)
 - 5.4 [Usage statistics](#)
 - 5.5 [AERLS Staff Position](#)
 - 5.6 [Terms of Use Data](#)
 - 5.7 [Off-campus Access](#)
 - 5.8 [Discovery Layer \(Done\)](#)
 - 5.9 [Link Resolver \(Full Text Finder\) \(Done\)](#)
 - 5.10 [A-to-Z List \(Publication Finder \[PFI or PFUI\] \) \(Done\)](#)
 - 5.11 [Discovery Layer - API \(Done\)](#)
 - 5.12 [License Storage \(Done\)](#)
 - 5.13 [IP Management \(Done\)](#)
 - 5.14 [Two-Year Electronic Resources Librarian Position \(Done\)](#)
 - 5.15 [Knowledgebase \(Done\)](#)
 - 5.16 [Database list \(Out of scope\)](#)
- 6 [Communication Plans](#)
- 7 [Zoho - Task Tracking](#)

People – Participants, Contacts, other

Team GROVER:

Peter McCracken, Jesse Koennecke, Liisa Mobley, Rebecca Utz, Peter Martinez

Internal Contacts/Liaisons:

Public Services liaison	Jim DelRosso, as chair of D&A User Reps group

External Contacts:

EBSCO Full Text Finder link resolver	EPOP - Chad McInnis (cmcinnis@ebSCO.com), library services manager; Sean Tivnan (stivnan@ebSCO.com), implementation project manager – <i>Sean is our primary contact for EBSCO SaaS products</i>
EBSCO knowledgebase	EPOP - Chad McInnis; Sean Tivnan
EBSCO Discovery Service	EPOP - Chad McInnis; Sean Tivnan
EBSCO MARC records	EPOP - Chad McInnis; Sean Tivnan
ProQuest, for transition	
EBSCO Contract Issues & Points	Nancy Grimaldi
OCLC, for hosted EZproxy option	Dan Hamparian, Senior Product Manager - Mgr, Global Product Management; hamparid@oclc.org
OpenAthens, via EBSCO	Jeff Arsinault, Amanda Ferrante

Timeline

SUBGROUP	Aug 15	Sept 1	Sept 15	Oct 1	Oct 15	Nov 1	Nov 15	Dec 1	Dec 15	Jan 5
MARC records		mtg #1 re profile	address unanswered questions	mtg #2; resolve all questions	submit complete profile		import test load to test; address and correct any errors		load full set of EBSCO records; delete existing Serials Solutions records that don't have POs, suppress those that do	review records; make modifications; start dealing with suppressed Serials Solutions records; for Jan 15: import load #2
Knowledgebase Management & data	identify the biggest knowledgebase data problems from among all current electronic resources vendors			Freeze & export all Serials Solutions data	start editing in EBSCO after they have uploaded Serials Solutions profile; start work in EBSCO on most important resources - top 5%		complete work on to 10% most important resources		continue database review work	continue database review work, to 2021
Intota FOLIO							freeze & export Serials Solutions Intota data?			
Link Resolver & A-to-Z List				mtg #1 re profile	test OpenURLs	mtg #2 re profile	update changes	mtg #3/ complete		make both live
GROVERnet Tracking Database	write requirements document		determine path to creating database	start building database			test completed database structure	import previously completed data		
Off-campus Access	submit report	receive approval; seek contract				start notifying vendors of IP management solution or additional IP range they must include				
EBSCO Discovery System		mtg #1 on profile		mtg #2 on profile		mtg #3 re profile	finalize all remaining profile edits			make EDS live
License Depot	start naming & storage guidelines design		complete design; test implementing in Box		start collecting all files into Box					

IP Management		investigate products & options		write plan on which to use and how to incorporate IP management into workflows					
License Limitations Data		define work needed here; determine path to extract, store, offer data	complete / implement design		export license limitations data from Serials Solutions; make it available internally		incorporate with EBSCO MARC records		start incorporating into FOLIO?
Job Search #1			interviews			start?			
Job Search #2			post position		interview		start		

Subgroup Projects

This list of projects was resorted on 1/13 by Peter McC, and is in a rough, quasi-correct, order of needed attention – reflecting a combination of importance and timeliness. For the most part, the higher the project, the more important it is that we work on it right now.

Peter also added notes from his 7 January 2020 overview of where we stand.

Tracking Database

We need to create a database that tracks which electronic resources have been managed/processed/whatever in each of the systems above. I don't know how or where we'll create this, but we do need to start thinking about it right away. I think we need to create a document that describes what the database will do, and then figure out how we'll make that happen.

PMcC needs to create some for of requirements document to define its expected actions; this is underway. (updated 10/16)

Peter, Jason, Jenn, and Steve met on 11/21 to discuss how we can keep moving forward on the tracking database. Peter brought a rough requirements document to the meeting, which may be helpful going forward. Peter said he'd start working on a spreadsheet to manage this data, either in Excel or possibly in Google Sheets. If it's done in Sheets, then maybe we can lay Google Forms on top of it to make it a bit easier to work with.

Next steps: Peter needs to start moving the fields noted in the requirements document into a spreadsheet to see how that works, and figure out if that will be sufficient. (11/22) This still hasn't moved forward much at all. PMc created a spreadsheet and found some challenges with that, but very little else. We can put it aside, because of the work that we're doing preparing for release on the 15th, but it does need to be picked up very soon. (1/13)

Problems/concerns:

- Will a spreadsheet allow us to track all the items we want to track here? If not, do we have the time or resources to build a better solution?
- As part of tracking the Off-campus Access changes (see below), we've created a separate spreadsheet. Does that indicate that we should use different spreadsheets for different tasks?
- Where will we find **all** of our electronic resources? What lists do we combine to feel like we have a full collection?

Next steps:

- Try to follow at least one resource through the process, to see if it works, and what problems we come across. Modify the spreadsheet, if possible.
- Schedule a meeting with those who helped the first time around, and see if they can help PMc move forward on the spreadsheet or consider different options.

IMPLEMENTATION: An implementation date for this is unclear. This resource will only be used by electronic resources staff, and we don't have a sense of when we can get it done.

Intota to FOLIO ERM

We are on track to complete this process; we have defined the work that's needed to add records to FOLIO. See [instructions here](#).

Next steps: Continue creating Agreements, and connecting Organizations, Licenses, and eHoldings with Agreements, as appropriate.

MARC Records

We've provided EBSCO with information about what we need to see in the records, and are hoping they are able to implement those edits. We expect to import the March collection of records, if at all possible.

Notes: We may need to create a 948 to define the record for some ARL/ACRL/NCES statistics management, unless we can find another way of generating that information.

Next steps: View next set of records from EBSCO. See if we can incorporate EBSCO database codes into records. Keep notifying EBSCO of no-MARC database names.

IMPLEMENTATION: Ensure March collection is as accurate as we'd like; contact EBSCO about adding database codes. Remove existing Serials Solutions records after importing EBSCO records.

Usage statistics

We need to get a handle on EBSCO's Usage Stats service, and understand how we'll access those resources.

Next steps:

Problems/concerns:

- a. We do not really know how this works. Ideally, as soon as EBSCO gets some data entered, we will be able to familiarize ourselves with the system

IMPLEMENTATION: Not a high priority; we can return the data we collect for them, but then let this sit until February or March 2020.

AERLS Staff Position

We need to hire a staff position to provide assistance with data checking, processing, and to provide backfill work so current staff can focus on the transition work.

Next steps:

IMPLEMENTATION: Position is currently being advertised; an offer has probably been extended by now.

Terms of Use Data

Jon Kline built a tool that pulls information about concurrent users and other license limitations from Intota. Blacklight also uses this information in some form. Currently, Serials Solutions provider codes and database codes are stored in the 856 field of the MARC records provided by them. Jon Cline scrapes license data from Intota once a day, and stores it in spot where it can be used by Voyager when a user clicks on a "Terms of Use" link. The Terms of Use link uses the 856 data to call the data that Jon has compiled, and then presents it to the user. We created this hack because Intota couldn't return the data quickly enough.

We may find better ways of presenting this information in the near future - either by using data directly from EBSCO (or FOLIO?), or by using MARC records that go to an interim results page that would also show Terms of Use. If we don't do this, however, or in the meantime, we want to be able to edit the data that Jon causes to be collected automatically, after we lose access to Intota data.

Next steps: See the page linked above, for specifics about what Jesse will do to seek out a solution here. It looks like FOLIO is already building tools to address this functionality for us. (page above updated 11/22)

Problems/concerns:

- a. The Project GROVER [Terms of Use Data page](#) lists other types of data that need to be findable, and we may not have a solution for all of them yet.
- b. Do we need to create a space outside of FOLIO to store information re various databases? Or can we create links to pull in data on database list pages, just using the FOLIO APIs listed above?
- c. Some folks are worried about the additional links to get to holdings or ToU data in the new environment. I'm worried about the amount of time it takes for EBSCO to load its ToU data.

Next steps:

- a. Jon will start working on this, and will contact others if needed for assistance. The ERM Slack channels may be excellent places to turn with questions about the API calls.

IMPLEMENTATION: This will not be complete by January 15. The current system shows default results, so it won't have negative effects if it's not updated by January 15. If time resources and API documentation allow, we hope to get this implemented by February 15.

Off-campus Access

A contract has been signed for implementing hosted EZproxy. OCLC has sent us information on how we will manage the shift to hosted, from locally-managed.

Our IP address for our server at OCLC is **132.174.252.179**. Josh Benson is our contact at OCLC. In completing the forms, I (PMc) put my name as the main contact, but I'm pleased to note that Jeremy Cusker will take this on right away. I will pass the information I've received from Josh to Jeremy, and I when I send a copy of our config file to Josh, I will tell him that Jeremy is actually our contact for this work.

Jeremy will get this moving, and Josh says our server is expected to be up and running by January 28, 2020.

Next steps: Peter will send our config file to Josh, and Jeremy will work with Josh to get us up and running. (12/4)

Problems/concerns:

- a. We may have missed the window to test the server. We need to complete that work and figure out what's next in getting it live. When should we make the switch? How will we check databases?

Next steps:

- a. Schedule a followup meeting to see how we're doing on contacting vendors
- b. Plan a big push to test server

Discovery Layer (Done)

We will implement the EBSCO Discovery Layer. EDS has been converted from trial to full use, and we now need to get it right. We have a number of tasks here: we need to ensure that the interface works as well as possible, based on feedback from public services staff. We need to ensure that as much content as possible is discoverable in it. The discovery layer appears to be in good shape, and just about ready to go.

EBSCO training videos re EDS:

- [EDS Linking 101 - 40 minute recorded session](#)

EBSCO guides re EDS:

- [EDS Best Practices Setup](#)
- [Custom Links Best Practices Guide](#)

Next steps: EDS is in good shape. A few small items remain, plus a bigger one of getting Full Text Finder links into EDS. But Emma has been figuring out a lot of this, and I think we're just about ready for release on 1/15 (1/13).

Problems/concerns:

- a. Smart links open in new tabs, while OpenURL links open in same tab. We notified Sean T of this in December. Maybe should submit a note to support about this, instead.
- b. Links without full-text in OpenURL don't offer an OpenURL/ILL link at all. Not sure why.

Next steps:

- a. Confirm with Adam Smith that we can make the URL change on the library home page, from Summon to EDS, on January 15.
- b. Schedule a meeting with EBSCO staff to have them review our implementation of EDS to see if they can identify any ways that we can further improve the interface and user experience.

IMPLEMENTATION: Replace the URL behind the "Articles & Full Text" link on <https://library.cornell.edu>, to point to EDS, instead of Summon, on January 15.

Link Resolver (Full Text Finder) (Done)

Peter Martinez reports that the link resolver is working now. We don't have it live in EDS, but it's ready to be turned on for all other resources fairly easily. We anticipate doing this in mid January.

NB: In OpenURL, **Source** is the OpenURL starting point, like an abstract & indexing database. The metadata about the resource in question starts in the Source, as a citation for an article or book, and is then sent (via the OpenURL format) to the knowledgebase, which checks to see if the library has access to the resource. The knowledgebase then generates a link to the **Target**, which is where the full-text resource exists.

Question for EBSCO: what's the difference between the "Find Articles" profile and the "Full Text Finder" profile?

EBSCO training videos re Full Text Finder:

- [Full Text Finder: Holdings Management](#)
- [Full Text Finder: Basics 45 recorded session](#)

EBSCO guides re Full Text Finder:

- [Custom Links vs Smart Links](#)

Next steps: This seems close to completion; we still have some questions about why FTF doesn't appear in EDS. I need to check with Emma and/or Peter Martinez to find out the status of this. (1/13)

Problems/concerns:

- a. None known. Check with Peter Martinez to see if he feels enough testing has been done to ensure the link resolver will work as expected.

Next steps:

- a. To make it live, Peter Martinez needs to change PURLs to point from 360 Link to Full Text Finder. He is connecting with Greg Delise and Robbie Douglas to change those PURLs.
- b. Test results to ensure they're working, after Full Text Finder is active.

IMPLEMENTATION: Make the change to PURLs on January 15, when other services are switched.

~~A to Z List (Publication Finder [PFI or PFUI]) (Done)~~

Our new Publication Finder site is at <https://search.ebsco.com/publications?custId=s9001366&groupId=main&profileId=pfui>, but this obviously has no customization for Cornell yet, at all. We can customize this via the EBSCOadmin site, for the pfui profile. (URL added 9/6)

On 8/28, Sean Tivnan said that EBSCO is currently working on a beta release of a complete rebuild of the Publication Finder (also known as PFI or PFUI). We could possibly get involved in selecting options for that, though the current plan is for having the beta version go live in summer 2020, and it'll have a focus on the simpler research approaches, so perhaps we'll want to stick with the existing products until the new PFUI is ready.

Also on 8/28, PMcC met with the D&A User Reps group to seek input regarding the AZ list. I combined that with the Link Resolver, as they seemed similar - but that might have been a mistake. We'll need to see. Caitlin Finlay expressed interest in participating in this work, particularly on the search outward when the link resolver cannot deliver the resource in question.

Question for EBSCO: how do we define the content that will go in to Publ Finder?

Next steps: In the 1/7 meeting, we decided to link to the new UI from the library home page. We will have two different interfaces, but in different locations, and eventually the old UI will be retired. Jim DeRosso asked that we change the default search from "all resources" to "Journals Only". This hasn't happened yet. We need to implement this before 1/15.

Problems/concerns:

- a. Are these proxying properly for users from both on campus and off, and for collections that don't need proxying at all?

Next steps:

- a. Confirm with Adam Smith that we can make the URL change on the library home page, from EJS to Publication Finder, on January 15.

IMPLEMENTATION: Replace the URL behind the "E-Journal Titles" link on <https://library.cornell.edu>, to point to the selected Publication Finder UI, instead of the E-Journal Portal, on January 15.

~~Discovery Layer API (Done)~~

We need to unplug Summon, and plug in EDS, into the bento box structure of Blacklight. On 10/28 I checked with Adam Smith about this project; he replied to say that Jim Reidy is working on this. He started on it on a previous sprint, and will be focused on it in an upcoming sprint, as well. I shared the <https://ediwiki.ebscohost.com> site, which has a lot of information about implementing the APIs.

Next steps: 1/13: We intend to switch this on 1/15, but I don't know if it'll be ready to do on that day.

Problems/concerns:

- a. Jim's schedule is tight, and I don't know if we're able to get all of these edits done in time.
- b. We have continuing problems in ensuring we're pulling up the correct holdings data, and I'm not sure that Jim is getting the information he needs from EBSCO.

Next steps:

IMPLEMENTATION: Update <https://library.cornell.edu> on January 15, so that the bento box results page incorporates data from the EDS API, rather than the Summon API.

~~License Storage (Done)~~

This is a small project coordinated by Liisa and Peter to create a box.com account/structure for storing scanned licenses. We want to have static URLs that will take us to each license, and we want to be able to easily locate licenses by multiple paths. We will build a specific structure for storing licenses, based on vendor names and product names, then dates, or something similar. We want to pull all licenses from all locations where they might currently be stored - emails, shared drives, individual hard drives, etc. This work can begin immediately.

Next steps: Ensure that those who manage licenses know how to store these documents. Use the instructions on the subpage here as guidelines for how to properly store these resources. Have students, staff, and librarians start storing outstanding documents in the appropriate folders. Creating the system, however, has now been completed. (10/31)

~~IP Management (Done)~~

IP management has been established through a commitment to use theIPRegistry.org as our way of managing IPs. See the sub-page for more information, and text that can be sent to content providers to get them connected with theIPRegistry.

Next steps: Start notifying content providers. We have agreed to work on a white paper with the IP Registry, as well, and we'll work on that when time allows and the process is really complete. We probably won't switch the proxy server to OCLC until late January or early February, but we can start encouraging vendors to use theIPRegistry right away. Though, if they reply that they don't plan to use it, we can't send our updated IP ranges until we've gotten the new proxy IP assigned by OCLC. But for the time being, we've completed this part of the project. (updated 10/16)

~~Two Year Electronic Resources Librarian Position (Done)~~

We need to hire someone to provide assistance with this project, and provide backfill work.

Next steps: Emma Raub starts November 4.

Knowledgebase (Done)

Rebecca Utz will be the primary contact for understanding how the knowledgebase operates.

Do edits to our EBSCOadmin account lead to changes at <https://eds.b.ebscohost.com/eds/search/basic?vid=0&sid=4e58d317-29bf-4f06-a69c-f8433f1aa6e7%40sessionmgr101> ? Where do we add non-EBSCO databases?

(Rebecca is adding information and additional questions to the Knowledgebase page)

Next steps: EBSCO has updated our holdings in their knowledgebase, and we can now start editing in there, as of 10/16. Since the MARC records, discovery layer, link resolver, etc., are still being powered by the Serials Solutions knowledgebase, some records will be updated in both places, as we determine that's needed or necessary. While we of course have lots more to learn about how to use the EBSCO admin site and knowledgebase, the transfer is complete, and I'm going to close out this task. (updated 10/16)

~~Database list (Out of scope)~~

The database list is created from a record in the 948 that Pam adds to the database MARC record. It's not something covered by Project GROVER, and will continue to be done for the foreseeable future.

Next steps: None; after conversation with Jesse on 10/31, we determined that this is out of scope for Project GROVER.

Communication Plans

We need to ensure that Public Services staff in all libraries know what changes we're implementing, and how those changes will impact users in all locations. We may need to create occasional one-pager updates (aka "Public GROVERviews"), or take questions about what they would like to see in implementations to R&O or other sessions.

Next steps: Xin has asked that we provide a several-page overview of how things will change in early January. This is an excellent idea, and we should have done so earlier than now, but we are working on it, and I hope we may have it ready to distribute before Thanksgiving. We'll see. (updated 11/22)

Zoho - Task Tracking

We have a lot of tasks already identified within Zoho, but we're not using it effectively. We need assistance from Tahir to better define the ways in which we use it, and how we get Zoho to help us ensure we're not forgetting anything.

2019-07-30 Meeting notes

Date

30 Jul 2019

Attendees

Peter McC, Peter Mart, Tahir, Rebecca, Liisa

Absent: Jesse

Goals

- Provide overview of Project GROVER and goals

Discussion items

Time	Item	Who	Notes	Actions
	Housekeeping		We'll try for every other week meetings, to start.	Peter McCracken : schedule future meetings
	Introductions	Peter McCracken		
	New Business			
	Review Project GROVER JIRA page	Peter McCracken		
	<ul style="list-style-type: none"> Review Sub-groups; Assign people to subgroups as appropriate Sort sub-groups by importance & timeliness 	everyone	<p>Disc Layer: Need to find people to participate in it.</p> <p>OpenURL: Peter Mart confirmed we have a PURL for the OpenURLs of Sources. When switching to Serials Solutions, we had a test URL to use. Can do the same on this switch, as well. We need to get information on how their linking resolver works in general.</p> <p>MARC records: Peter Mart said we need to be sure we check on the quality of their records, etc. Liisa said Pam is good contact for reviewing cataloging quality. Maybe have an ebook person review content, as well. the sub-committee needs to develop a ; Rebecca asked how will we deal with Serials Solutions records that have POs attached to them? Probably in the thousands of records. Records with PO won't be deleted, so we could delete all Serials Solutions records then suppress all that remain.</p> <p>Knowledgebase: Peter McC needs to do background work on what we did with EBSCO so far. Liisa has done some comparison of how EBSCO tracks data compared to Serials Solutions; will be good to get an overview of it. We need a sub-group that will become experts in the EBSCO knowledgebase system.</p> <p>Database list: Curated list of ~500 databases; Pam adds 653 to put it in appropriate subject headings on database page. Webfeat database code in 948, plus 653. Pam will be expert on this. Will this be left to D&A, later, or to Blacklight, or is it something Project GROVER does?</p> <p>Usage Stats: Since we use Intota to do this, this is in our area of responsibility. Someone will need to look at how this is done. Liisa said to work with Adam on this. Sally said that most have switched to COUNTER 5, and we may not even see these stats until late in 2019.</p> <p>License Limitations Data: Public view of concurrent users, etc. John Kline has a tool that pulls this from Intota, and Blacklight uses it. This needs to be investigated further, and we need to figure out how to take that data and make it accessible until FOLIO can do so for us.</p> <p>Public Facing Information:</p> <p>Tracking database: Peter Mart described a number of ways we could make this work, starting just with Access, but many other options exist, as well. SQL Lite is also a possibility. Tahir says important to define the process - process should dictate technology. Define what needs to be done, what the requirements are, who is involved, who should be notified, how will we validate the work (who needs to do review). Defining that process, then creating an example or two, would be very useful. From there, we can figure out the tool. Peter McC will start on a requirements doc asap.</p>	
			<p>We resorted the list of subgroups, to put them in the most relevant aorder.</p> <p>Deliverables, by subgroup:</p> <ul style="list-style-type: none"> Tracking database: Peter McCracken will create a draft requirements document; hopefully, he will have shared with other people in advance. IP Management: Liisa S. Mobley and Peter McCracken will tackle this; Peter will set up calls or something to help us understand what our options are here. Off-campus Access: Peter McCracken will complete the review of hosted OCLC and EZProxy, and send to LTS or LEG, for decisions. MARC Records: Peter McCracken and Peter Martinez will start to review comparisons of how to create these records, but prob not before next meeting. Knowledgebase: Rebecca M. Utz will contact EBSCO and figure out what we can learn, and what we need to know about it. Two-Year Electronic resources librarian position: Peter is running search committee. No tasks for this committee. all others: nothing before next meeting 	
	Zoho Overview	Tahir	<p>Tahir provided an overview of Zoho and how we can use it. Milestones help us track how far we are to completing our goal. Gantt charts are available to identify critical paths and task dependencies. Dependencies are shown on lists of tasks, when mousing over the relevant task, to see "predecessors" and "successor" tasks.</p> <p>For Zoho, Tahir Ahmad Poduska will send invites to Peter Mart, Liisa, and Rebecca.</p> <p>We need to better identify task deadlines and owners. Also redo the structure to reflect the subgroup setup.</p>	

Action items



2019-08-13 Meeting notes

Date

30 Jul 2019

Attendees

Peter McC, Peter Mart, Jesse

Absent: Tahir, Rebecca, Liisa

Goals

- Provide overview of Project GROVER and goals

Discussion items

Time	Item	Who	Notes	Actions
	Housekeeping		We'll try for every other week meetings, to start.	Peter McCracken will set up regular meeting schedule
	Old Business			
	Items completed since last meeting		PMcC created EBSCOadmin accounts for e-resources folks; who else needs one? Paul Heckathorn will work on EDS (Discovery Layer) work. Paul, Peter, and Jesse attended an online meeting with EBSCO folks focusing on EDS, with some information about how we'll manage databases as well. PMc met with Jim DelRosso re D&A representatives	
	New Business			
			Team GROVER personnel changes	Tahir is leaving Cornell to pursue a position in the DC area with NIH or NLM or similar. He leaves in a week or two, so won't be joining us further.
			Review Timeline; discuss issues or changes to that For License Limitations Data - we need to determine if EBSCO can deliver this at present. If we have a link directly from MARC to list of holdings elsewhere, that could resolve this issue. If not, we need to figure out how we could edit the file that Jon Cline created. We need to create a group	PMc needs to convert Timeline info to Zoho. Jesse can take a lead on this topic.
			This month's FOLIO Friday is about Project GROVER, on Aug 16, presented by Peter McC	

Action items



2019-11-01 Meeting notes

Date

30 Jul 2019

Attendees

Peter McC, Peter Mart, Jesse, Jenn, Liisa,

Absent:

Goals

- Provide overview of Project GROVER and goals

Discussion items

Time	Item	Who	Notes	Actions
	Housekeeping		If you have the opportunity, watch the overview of ERM status from 10/23 online FOLIO Forum, on Youtube here .	Peter McCracken will set up regular meeting schedule
	Old Business			
	Items completed since last meeting		<p>Review items that have been crossed off of the Project GROVER list, as completed.</p> <p>Fifteen-word summary of each subproject, as of today:</p> <ul style="list-style-type: none"> • Tracking database: Not built; freaking Peter out; needs lots of work. Very important • Discovery layer: Need to request more information from EBSCO about its data. Need to submit questions to EBSCO re layout. New UI coming in about 6 months. • Intota to FOLIO ERM: Good meeting yesterday; Jenn & Robbie are doing super work on getting a FOLIO ERM instance up and running for us to use soon. • Link Resolver (Full Text Finder): Peter Mart reports that it's working. He needs to do some advanced testing, but it's in excellent shape. • A-to-Z List (Publication Finder): No real action; we need to understand the underlying data source. Could use some design attention. • MARC Records: Peter McC received a new set yesterday; they need to be reviewed, tested, and we need to send an updated profile. We need to pay attention to how our records link to the TOU issue. And what if, in the future, we could use the EBSCO API to draw holdings information into the record, as it's displayed in Blacklight? • Usage statistics: Peter McC needs to compile and review the data provided from EBSCO on 10/22, then determine next steps. • Discovery Layer - API: Adam Smith said they're in good shape; he or Jim Reidy will contact Peter McC if they have questions. • Two-Year (Now One-Year) AERLS Staff Position: Jesse submitted final justification documents today. • Off-campus Access (Hosted EZproxy): Currently stuck in a contract problem between OCLC and CUL. Xin is trying to get just EZproxy moving, and leave the Master Service Agreement for later. Unfortunately out of our hands at present. • License Storage: Done. Information needs to be distributed to those who need to follow it: primarily Jesse, Peter McC, Liisa. Maybe Emma. • IP Management: Done. Information needs to be distributed to those who need to follow it, though we really should just wait for new IP address from OCLC. • Two-Year Electronic Resources Librarian Position: Done. Emma starts on Monday • Knowledgebase: Done. All Serials Solutions data has been moved to EBSCO. Rebecca is gaining knowledge of how to work in EBSCO; we also need to understand the profiles paradigm that EBSCO pursues here. • Database list: Out of scope. The database list is generated from individually edited MARC records, not auto-generated ones. Also, the current system will remain effective while Vgr is still active. 	
	New Business		UX Input - When would we like to work with Darcy and Huda, regarding thoughts on the interface, and how it could be improved? They will always welcome our input on this topic.	Peter will set up an appointment with Huda and Darcy for a week or three after we've set up the FOLIO instance.

		<p>Setting up local instance of FOLIO for ERM, especially w/r/t running FOLIO ERM for 18 months before switching remaining services to FOLIO.</p> <p>- Would VPN be sufficient for access when working from home? Or, would that <i>not work</i> for anyone?</p> <p>Jenn will discuss mapping Intota output to FOLIO. Discuss timetable and milestones to getting FOLIO ERM live.</p>	<p>Several items I remember, from what I typed but failed to save:</p> <p>We discussed the possibility of migrating data from Intota to FOLIO ERM on December 1; it appears this would be doable, but we might instead wait until after the Q4 release on Dec 21. We could come back from break with files ready to import, and do so in very early January 2020.</p> <p>Robbie will set up (actually, he has already set up) a FOLIO ERM instance, which we will connect with the EBSCO admin eHoldings API (Jenn Colt will contact him about that). This will be a production instance, which will allow us to run EBSCO admin knowledgebase via the FOLIO interface. We'll then do migration testing on the Implementation Group FOLIO instance, and once it's established we'll do the actual migration of Intota data into the ERM production instance.</p> <p>Users: Jenn has a list of those who need access. Peter McCracken will check to see if anyone who currently has Intota access will also need FOLIO ERM access.</p>
		<p>Peter Martinez reported on link resolver work. It's working, and looking good, but he wants to find some more complex queries to push at the knowledgebase. We need to look at various alternatives for actions to take when we cannot locate a full-text version of the article in question.</p> <p>We are also uncertain about what knowledgebase (or, really, which profile) is powering the data behind FTF.</p>	
		<p>Generate list of questions for EBSCO; plan for webinar session to go through these (EDS questions can just provide answers in email)</p> <ul style="list-style-type: none"> ▪ How do we add a database for inclusion in EDS, but not MARC service? Specifically, which profiles do we use? ▪ What is the difference between the "Full Text Finder" profile and the "Find Articles" profile? ▪ Which profile controls the databases included in the link resolver? ▪ How do we exclude a database from EDS, but include it in other services? ▪ The Full Text Finder profile has no databases associated with it - which profile controls its contents? ▪ In the EDS interface, is it possible to vary the width of the the 'filters' panel on the results screen? ▪ How do we filter by database in EDS? ▪ Summon has a 'hover-view' that shows the abstract of the article, from its "Preview" link. Is that available in EDS? ▪ One librarian noted that he likes the Scopus and Web of Science citation counts in Summon - are they available in EDS? 	<p>Peter McCracken will contact EBSCO to establish this session. After the meeting, Nancy Grimaldi sent a list of videos that may be useful. I need to create a training space for them, or something like that.</p>

Action items



Current Status of EZproxy Access Problems

The table below shows the status of electronic resources that remain impacted by the switch from locally-hosted EZproxy to OCLC-hosted EZproxy. For each resource, we must have OCLC add a stanza for that resource, and have the resource publisher add the IP address of OCLC's server. The former task is pretty easy. The latter task ranges from easy to nigh-on-impossible. We hope this page will help us be more transparent about where we are in this process.

If you're having a problem with one of the resources listed below, know that we're actively working on it. If you can help – contact names of sales reps who might not get a renewal become useful at some point – please get in touch with the contact person. I apologize about these problems; we want these fixed more than you do! Trust me on that.

But if you're having problems with something that's not on the list below, please do let us know . It may be EZproxy, or it may be something else - but we want to get it fixed, and we can't find all of the problems without your help.

Resource Name (CUL contact, LibAnswers ticket no., bib ID, other info)	Resource Status	Last Update
Annual Reviews (pjbh)	Rec'd an access error report (via LA) on 11/20. Notified OCLC and AnnRev by email.	11/20 /2020
ARES / CANVAS / Reserve readings Peter McCracken	It seems that, in the past, EZproxy would not block access to a site if the site wasn't listed among EZproxy stanzas. This has changed with the switch to hosted EZproxy, because there are some security concerns around it. I (PMc) am trying to understand the issues around that, to figure out how we should move forward. At the same time, Ares seems to be putting the proxy string at the front of every URL, even if we have told it not to. I don't have any insight into why this is, or if Ares is misbehaving, or what – I don't have any regular interaction with Ares. So we seem to be stuck with Ares always applying the proxy string, and that's causing problems for students. I don't see a path to a solution here, yet.	9/8/2020
Westlaw China Peter McCracken	OCLC added a stanza for us. I contacted our rep at Thomson Reuters to get the IP address added. I hope it will be. Update: they require a customer number for this. I contacted Law Library to get that customer number. Will get back to Thomson Reuters. This one shouldn't have taken me as long as it has.	12/23 /2020
SpringerMaterials Sally J. Lockwood	This is not an EZproxy access problem. We're working with Springer to figure out the problems here. At Leah's request, send all SpringerMaterials problem reports to her.	7/21 /2020
MyiLibrary	links from within Voyager redirect to Ebook Central when on campus, but not when off campus. The books are still available, through Ebook Central, just not directly. We'll need to update a bunch of Voyager links, apparently. I'm afraid I haven't tackled this one yet.	
Harpers Weekly (HarpWeek) Rebecca Utz LA #5583337	This is the access through Alexander street press, but the URL is https://app.harpreweek.com . Contacting publisher, it did go through ezproxy so assuming they need the OCLC proxy IP	8/10 /2020

The following resources have had problems that have been resolved. We believe them to be working now, so if you come across a problem, please let us know.

- Official Museum Directory - problem resolved via work done by OCLC. This was a significant problem that prevented access for all hosted EZproxy libraries trying to access OMD. Now working. (2/16/2021)
- Coop Database Access (confirmed 11/11)
- Skillsoft ebooks (confirmed 11/11) - we finally figured out a URL that works. We had to move outside of EZproxy completely to make it work, then we had problems with getting passwords to work in an EZproxy file (so, not *completely* out of EZproxy) - but finally, we figured out a way of making it work. Natalya updated all of the URLs, and now links directly from the catalog work, as do links from Pub Finder.
- Cochran Library (confirmed 11/11) - I logged in through the Voyager record; I see "Access provided by: Cornell University Library".
- TaxNotes (confirmed 11/11) - The site recognizes users as coming from Cornell when going through the link in the catalog.
- EastView Universal Databases (confirmed 9/18) - also involved an excessive download problem (very complicated!) but is now working.
- China Law & Practice (confirmed, 9/8) - works at the publisher site now

- CQ Interactive (confirmed, sorta, 9/8) - CQ Interactive made major changes to their platform. It appears that they no longer use IP authentication; now, students must create an account with their Cornell email address, at <https://learning.casequestions.com/offers/9dTLdJeD>.
- Classique Garniers (confirmed 8/10)
- Films on Demand (confirmed 8/5) - all content also avail via <https://newcatalog.library.cornell.edu/catalog/9923471>
- Reaxys (confirmed 8/5)
- MSCI / ESG Direct - 1200% credit goes to Suzanne Cohen for getting this one resolved! Thanks a million. It now works. (confirmed 7/24)
- Dictionary of Old English (confirmed 7/21)
- Cornell Electronic Text Center resources (confirmed 7/21) - all are now accessible
- Zeitschrift für Arbeits- und Organisationspsychologie (confirmed 7/17)
- JustisOne (confirmed 7/17); hot diggity - we got this one resolved.
- Law.com (confirmed 7/16); access works when going through the proxy in Safari. Moving off the table above.
- Capital IQ (confirmed 7/16); access through the proxy server allows one to create an account, or to log in to an account with Cap IQ. Moving off the table above.
- PlantCell.org
- CHANT database
- WGSN
- Passport
- Kindlers Literatur Lexikon
- Lancet
- New Left Review
- London review of books
- Plant Disease Management Reports / PDMR (confirmed 7/22)
- Peeters - they don't allow proxy access
- Wageningen Academic Publishers (e-journals and e-books confirmed on 7/23)
- Akademiai Kiado (confirmed 7/29)
- IPLC Archive-It sites (confirmed 8/5)
- HarpWeek (confirmed 8/11)
- Catalyst (8/11)
- Cochrane Library (8/11)
- Veterinary record (8/27)
- Moving the social -ejournal (9/11)
- Torrossa (9/22/2020)
- Vandenhoeck & Ruprecht (9/23/2020)
- Africa Knowledge Project (10/5/2020)
- UC press (10/29/2020)
- BMJ (10/29/2020)
- Wiley Archive access (11/3/2020)(merged this account into our mail Wiley account)
- Allen Press (11/9/2020)

Thanks; we apologize for the problems with these resources, and hope we can get them all fixed as soon as possible.

Discovery Layer

The static URL for EDS is <http://search.ebscohost.com/login.aspx?authtype=ip.guest&profile=eds&Groupid=main&custid=s9001366>

This subgroup will include D&A member(s), to provide feedback on layout questions. On 8/28, PMcC met with the D&A User Reps group to seek input regarding the discovery layer and how it will operate. Nina Scholz expressed interest in participating in this work, though she might not be free until mid-September.

At the EBSCO Users Group meeting, I saw presentations on a number of different plugins for EDS; we should consider which, if any, we should implement. I also learned that a new UI is on its way, so whatever we have initially will only last for a few months, most likely.

Important note: We need to figure out who manages the page at <https://www.library.cornell.edu/help/articles/summon>, and who will update it to EDS. (PMc, 10/4)

Other tasks: PMc must follow up with EDS staff to answer the questions that were raised at the O&E session.

Someone must determine exactly how, in EBSCO admin, we define which databases will appear in EDS. This is not clear to me, still.

Sally has done work on what the various options are for the interface, and we need to move forward in sharing that, and determining what changes we want to see there.

Intota to FOLIO ERM

Milestones

Data migration into Folio 3.2 - 12/19 (partial load)

Folio MVP dev deployment - 12/24/19

Stop work in Intota - 12/31/19

Load testing complete - ???

Final data migration - 1/10/20

User testing complete - 1/17/20

Folio MVP production deployment - 1/20/20

Folio x.x deployment

Handoff to EBSCO - ???

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- [Robbie's brain-dump](#)
- [System Requirements](#)

FOLIO ERM Meeting Notes

- [2019-10-31 Meeting Notes](#)
- [2019-11-04 Meeting Notes](#)
- [2019-11-25 Meeting Notes](#)
- [2019-12-13 Meeting Notes](#)
- [2020-1-6 Meeting Notes](#)
- [2020-1-13 Meeting Notes](#)

2019-10-31 Meeting Notes

Discussed:

The main foci were ERM project management and long-term support and implementation questions.

- Must go-live before DOOK! And definitely before Spring semester starts.
 - This would be Jan 21.
- What are our success criteria? How do we know we've actually launched?
- Need to define user permissions - could we hide the irrelevant sections?
- John Cline's TOU (Terms of Use) integration? May not be active/used. Jesse is looking into it. (jenn: if this is going to break we should let d&a know soon as we're sure because they'll need to adjust on the front in end in a few places)
- Peter will also look into the database list (jenn: this list is built by flagging a 653 with a matching subject <https://newcatalog.library.cornell.edu/databases> So this would have to be in the new MARC piece of the project I think) (PMc: this isn't a problem; these 653s are added to database records that do not come from Serials Solutions (to be replaced by EBSCO). I've determined this is Out Of Scope for Project GROVER, and won't be impacted by any of these changes. The fields will still be added to MARC records, and we won't need to actually address this issue until we leave Voyager, in July 2021.)
- Generally we need an IT project plan. Timelines, milestones, expectations. Could link off of the overall GROVER plan on Confluence. Let's add Peter to the FOLIO JIRA project.
- What if the FOLIO app has issues?
 - Support processes
 - Tolerance of downtime? Pretty high.
 - Data loss / restoration? Several staff members will be changing ERM data every day, so preserving the data is important. Could they recover from a day's worth of data lost (backed up daily)? We will snapshot the database regularly. Sometimes the FOLIO app needs to be blown away and rebuilt when there's a problem.
- How many users access Intota? Prolly more now than it will be with FOLIO. Maybe a dozen?
- How much traffic would there be on the API? We should load test and try to break it.
- EBSCO A to Z list of all e-journals we can access (ERAMS - eResources and ...), a link resolver from a citation in a DB to the full text, the KB that manages all of those, discovery layer (EBS) ... historically still wasn't enough, so other ERM tools (Serial Solutions' Intota is what we use).
- Our ERM shifts from Intota to FOLIO. The other stuff shifts from ProQuest or Serials Solutions to EBSCO (non-FOLIO products). The whole thing is called "Project GROVER". From Summon to EDS. Link Resolver migration. Intota > FOLIO is just one component. Intota lasts through the end of January. Liisa Mobley has proven she can download the Intota data. They manage their data in EBSCO Admin.
- Peter's team will upload the Intota data into FOLIO ERM.
- How does EDS plug into FOLIO ERM? Not tightly connected. The eHoldings app by EBSCO has a connection to FOLIO.
- FOLIO versions - we would want to keep up with them. So there's a data migration question from version to version. Extract, transform and push would still need to be done - data migration process.
- Is there sensitive data? User name / pws for most e-Resources. Contract info. Sensitive financial data. No patron usage data.
- We should cost out the AWS charges (EC2, RDS, data ingress/egress)
- User to Folio data flow (a diagram of this would be nice)
- System requirements
 - API Traffic
 - User access and permissions
 - No SSO
 - Folio login is sufficient
 - VPN for off campus networks?
 - Uptime
 - Data loss
 - Security
 - CIT review?
 - Pen test?
 - Data migration between versions
 - DR plan
- Project plan development
 - Timeline
 - Milestones
 - Roles
 - Infrastructure support = libsys team
 - App support = ???
 - Expectations
 - Artifact management
 - JIRA
 - GROVER Confluence

2019-11-04 Meeting Notes

Dev/Prod path

Discussed the ERM staff request to have the FOLIO ERM / EBSCO API working, and also the # and naming conventions of FOLIO ERM instances, and whether to keep them separate from the Data Migration Group env'ts. Jenn prefers to keep them separate to avoid confusion around Organizations etc. The DevOps team will have its own instance to work from.

Also discussed setting accurate expectations with the ERM team about what can be delivered and supported when.

Setting up Prod version

- API only at first
- Prod URL will be something like folio-erm.library.cornell.edu
- Loads of caveats
 - Production support will be limited initially and rolled out in phases
 - This is not a precedence for deployment we want to set - do not expect we will do this for other systems
 - Need a meeting with Peter to go over these caveats

folio-erm-dev

- Add dev API for testing
- Data loading development will be done here and moved to prod when ready (potentially on the original January timeline)

folio-erm-devops-test

- System development and testing will be done here and moved to folio-erm-dev when ready

2019-11-25 Meeting Notes

Agenda

Discuss/define project timeline and milestones

Discuss application support resources available - Frances or Joe - someone else who knows Java maybe?

Mapping data flow - this isn't critical for production release but would be super helpful to support ERM specific work and testing

Mapping integrations - this is critical for production release - it was unclear what and how we are plugging things into Folio in our last discussion

Update on Data Migration work (Jenn)

- Getting Joe to help with Organization migration

Update on Infrastructure work (Robbie)

Update on Folio MVP release - what is and what isn't going to be in the release and do we care in an ERM only instance (who's been keeping up with this?) - we are mostly looking at what Chalmers is asking for

Data Migration

Working on mappings with Lisa

Some of the Terms API might have issues

Need to load Organizations data (done before)

Need to Licenses

Terms might need to wait until MVP

Data by and large needs to JSON to get into the system

Issues are being tracked mostly UI problems

Intotata, ProQuest (KB) integrations

Owen to look into if changes bt/ 3.2 and MVP

Need to clean data in spreadsheet after pull from Intota

Milestones

Date	Action	Responsibility
12/16 to 12/19	Data migration testing into FOLIO 3.2	Jenn team & AERLS team
12/20	FOLIO MVP is released (click here to view the 165 issues in this release)	
12/24	Deployment of FOLIO MVP dev instance (this is the development environment, for testing)	Robbie
12/31	Stop managing ERM data in Intota	AERLS team
1/2 & 1/3/20	Final download of data from Intota	AERLS team (Liisa)
1/6 & 1/7	Data migration testing; load data into FOLIO MVP dev (running MVP); load testing and review	Jenn team & AERLS team
1/10 (?)	Deployment of FOLIO MVP prod instance (this will be the production environment, for daily use)	Robbie
1/13 & 1/14	Data migration to FOLIO MVP prod	Jenn team & AERLS team

1/16 or 1/17	Begin managing ERM data in FOLIO MVP prod	AERLS team
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Not in table above:

- Final data migration - 1/10/20
- Load testing complete - ????

2019-12-13 Meeting Notes

Agenda

Data migration updates

MVP updates

EDS updates coming in Q1 (from Harry)

- Performance improvements
- UI improvements

Chalmers has been using ERM - did migration by hand - was Intota, Serial Solutions, Triple I

Timeline/milestone review

2020-1-6 Meeting Notes

2020-1-13 Meeting Notes

Robbie's brain-dump

Next steps

- Setup dev cluster
- Cluster level monitoring with Prometheus and Grafana
 - PVC
 - node availability alert
- Etcd backup
- DB backup
- Logging to ElasticSearch
 - Need to figure out performance specs on ElasticSearch instance
 - Trying out cluster of 2 t2.medium.elasticsearch instances
 - https://vpc-folio-erm-7udgx2cujonl5jbv5yrfo2lune.us-east-1.es.amazonaws.com/_plugin/kibana/
- Deploy Folio
 - ~~Define ERM only~~
 - ~~ERM only Stripes~~
 - ~~ERM only create-deploy~~
 - ~~ERM only workloads.yaml~~
 - Memory limit review
- Application level monitoring
- Setup node scaling
- Alerting from Rancher
 - Slack
 - Email
 - Something is wonky with setting up culit.net smtp user
 - OpsGenie
 - No Rancher integration yet - appears to be in the works at Rancher
 - Work around could be Rancher sending emails to ...@cornelluniversity.opsgenie.net
- Task estimates
- Define roles
 - App support lead
 - Load testing lead
 - Requirement gathering lead
 - Folio user perms
 - EDS integration
 - Upgrade/update policy

Questions

- What is the estimate of the number of man hours we need to get it done?
- What is the expectation/tolerance for unplanned downtime?
- What is effect of downtime on day to day operations?

Need to learn how to

- Backup and restore etcd
 - In same Rancher
 - In new Rancher
- Migrate existing cluster to new versions of Rancher/Docker/k8s
- Log export
- Monitoring / Alerting
 - Rancher
 - Cluster

- Rancher Notifiers
 - Slack integration
 - Email - looks like having Rancher on the private subnet is blocking the inbound traffic
 - https://docs.aws.amazon.com/vpc/latest/userguide/VPC_NAT_Instance.html
 - https://docs.aws.amazon.com/vpc/latest/userguide/VPC_Scenario2.html
- Prometheus
 - Setup persistent storage
 - Node availability alert
 - Monitoring frequency
- Grafana
 - OpsGenie integration
 - Setup persistent storage
- Istio as of v2.3
- What do we need to be monitoring?
 - App
 - Mod
 - Mem usage
 - Scaling?
 - DB
 - Node
 - Heartbeats
 - CPU
 - Mem
 - I/O
 - Disk pressure
 - Cluster
 - Scaling events?
 - Rancher
 - Node
 - Heartbeats
 - CPU
 - Mem
 - I/O
 - Disk pressure
- Resource limits
- Health checks
- Scaling
 - Nodes
 - CPU
 - Disk pressure
 - Memory
- Further automation of deployment
 - New version update of Yaml
 - Helm
 - Rancher Pipelines
- Load testing
- Pen testing
- SSO integration
- SMTP
- Non-diku tenant
- Password reset
- How to hand off to EBSCO in July

Need to define/research

- Integration with EDS
- ~~ERM only deployment tweaks to Stripes, Okapi and list of necessary mods~~
 - ~~List from Owen Stephens on Slack~~
 - ~~mod-users/ui-users~~
 - ~~mod-agreements/ui-agreements/ui-local-kb-admin~~
 - ~~mod-licenses/ui-licenses~~
 - ~~mod-organisations/ui-organizations~~
 - ~~mod-choldings/ui-choldings~~
 - ~~mod-erm-usage/ui-erm-usage~~
 - ~~mod-erm-usage-harvester~~
 - ~~plugin-find-erm-usage-data-provider~~
 - ~~List from <https://github.com/folio-org/platform-erm/blob/master/package.json>~~
 - ~~List from Peter via Jenn on Slack~~
 - ~~organizations~~
 - ~~licenses~~
 - ~~agreements~~
 - ~~e-holdings~~
 - ~~users~~
- Performance reqs
- Expected traffic
- Folio version
- Knowledge base config
- Infrastructure versions
 - Postgres

- 10.9 as of 10/27
- k8s
 - v1.13.5-rancher1-2 as of 10/27
 - Need Rancher 2.3 to upgrade to 1.14
- Docker
- Base images for Okapi and Stripes
 - Others?
- Best AMI/Instance type for cluster
- Security group / IAM policy review
- Number of environments
- Deployment process
- Upgrade process
 - Folio
 - Version upgrade
 - Hot fixes
 - Docker
 - k8s
 - Rancher
 - 2.3.1 is latest but not marked as stable as of 10/27
- Fault tolerance
 - EDS
 - Other?
- User permissions
 - Do we need SSO?
- Network access
- Database BU strategy
- DR plan
 - DB backup
 - mod specific?
 - App redeployment automation
- Budget
- Roles
 - Infrastructure support
 - lib-sys team
 - Contractor
 - Rancher
 - \$66k annual for platinum support
 - \$30k annual was floated for standard
 - RoundTower
 - App support
 - Who can support the modules running in Folio?
 - Understanding error messages
 - Know how to make tweaks to configuration to improve performance
 - Who can support the EDS integration?
- Reporting
 - Integration with LDP
 - No data feed - other Folio apps have a data export option
- Security review?

How Prod is different from Dev

- Database init process
 - Is the snapshot use good enough?
- Unique secrets
- DB backup
- etcd backup
 - 2.2.3 has issue with how failed backups to S3 appear in the UI. Supposed to be fixed in 2.3.
- DB multi-zone
- User management
- Locking down the rancher-nodes security group

Things to consider

- Hosting in EKS
- Multi-cloud hosting
- Moving DB back to containers

System Requirements

Access

VPN

- Pros
 - Added security
- Cons
 - VPN goes down occasionally

Permissions

- What permission sets do we need?
- What user groups do we need?
 - Super admin
 - ERM admin
 - User

Performance

Maintenance

DR

IP Management

Goal/Overview:

We want to implement a better way of managing our IP ranges. We have long-standing problems with content providers holding incorrect IP ranges for us; some even still maintain the IP range of the Arecibo Telescope facility as an IP range for Cornell University. Because of the complexity of how machines are assigned in New York City, Cornell Weill Medical Center has an very long collection of IP ranges. Their medical school in Qatar has other complex problems maintaining their IP ranges. The potential introduction of an alternative to our locally-hosted EZproxy tool will introduce a need to update IP ranges held by all content providers, and it is the perfect time to ask as many of them as possible to obtain IP ranges from one of the IP management systems, rather than directly from us. We have a range of ranges, in a sense: resources that are only for access from the Ithaca Campus (which includes Cornell Tech), resources that can be accessed from Ithaca and from Cornell Weill, those accessible only from Weill, similar variations that include or exclude Qatar, and others. One license agreement limits our access to machines that are physically located in Ives Hall, for example. This will allow for easier management now and in the future, both for them and for us.

Implementation:

We have decided to work with [theIPRegistry](http://theIPRegistry.org) to manage our IP ranges. They appear to be much more committed to this work than does RedLink; for RedLink the IP management seems to be a side project that is not getting much attention. Libraries do not pay IP Registry, but publishers do, so revenue is involved; there's a benefit to it for them, and they'll work on making it work. On Friday, Sept 20, Peter McC, Liisa M, Michael Wood at Weill Cornell Medicine, talked with several folks at IP Registry, and they were very interested in making this work for us, and for them. The conversation was valuable and we understood better how to change what we do for managing IPs, and for telling content providers that they should go to IP Registry to stay current with our IP ranges. This will be especially helpful as we implement a new IP range for improved EZproxy management.

On Monday, Sept 23, Debbie Wilton, their marketing person who had been on the Friday call, emailed to ask if they can use Cornell's name in an announcing tweet; I confirmed this would be OK with Jesse and then said yes to them. Debbie provided the following text to send to publishers to tell them to go to the IP Registry for our updated IPs:

We are now using theIPRegistry.org to manage our IP updates. This allows us to communicate IP changes to multiple vendors simultaneously. If you sign up to receive updates from theIPRegistry.org you will also benefit from reducing the burden on staff; saving time and streamlining processes. All IP updates are fully vetted and verified before dissemination to publishers and can be sent out to publishers through the daily digest or pushed out to publisher systems automatically via API - this prevents the introduction of errors due to manual entry. Verification of IP addresses eliminates the errors that commonly occur, ensuring that the right content is available to the right customers, and has the additional benefit of improving the accuracy of usage metrics. To find out more please contact info@theIPRegistry.org

This is long, but it covers what's needed. We can copy and paste, and send this to each vendor. We will track who has been contacted and who has replied, here. (add link when it's defined)

Greetings -

Cornell University Library is making several changes to how we provide authenticated off-campus access to subscribed resources. In a few weeks we will be switching to OCLC's Hosted EZproxy service, and we therefore must request that you add an IP address to our collection of IP ranges. This IP address will provide safe and reliable access for our off-campus users to your resources, and it is critical that it be added to the collection of IP addresses you are tracking for us, to ensure reliable access for all appropriate members of the Cornell community.

To simplify this process, we are now using theIPRegistry.org to manage our IP updates. We firmly believe that using theIPRegistry will save time for both us and for you, and will lead to more accurate IP management all around. All IP updates are fully vetted and verified, and can be distributed through a daily email digest or automatically via API. Verification of IP addresses eliminates common errors, ensures that the right customers can access the right content, and improves the accuracy of usage metrics.

<<<choose the correct message to send from below; delete the others, and this line>>>

To accurately track all Cornell IP ranges, please follow theIPRegistry's institutional identifier USAAS0UNI435026.

To accurately track Ithaca-campus Cornell IP ranges (this excludes the Weill Cornell Medicine campus in Manhattan), please follow theIPRegistry's institutional identifier USAAS0UNI681317.

To accurately track the Weill Cornell Medicine IP ranges (this includes Weill Cornell Medicine - Qatar, but excludes the Cornell Ithaca campus), please follow the theIPRegistry's institutional identifier USAAS0COL448383.

To accurately track only the Weill Cornell Medicine - Qatar IP ranges (excluding all other Cornell campuses), please follow theIPRegistry's institutional identifier QATAS0MED663985.

For more information about theIPRegistry, please contact info@theIPRegistry.org

If you don't choose to track IP ranges via theIPRegistry, please add the following range to the IPs you track for Cornell University: **132.174.252.179**. Also, please notify us when you start to follow us at theIPRegistry, or when this range has been added, so we will not need to bother you further about this issue.

Thank you,

Cornell University Library E-Resources Team

As soon as we get the specific identifiers for each institution, we can start distributing these messages to our content providers.

Right now, Peter McC is administrator of our account; Michael Wood has an account for Weill Cornell Medicine. I don't think we need more accounts at present, but can change that if things change.

Knowledgebase

We log in to the EBSCO knowledgebase at <https://eadmin.ebscohost.com/eadmin/login.aspx>.

On 8/1, Peter McC created separate accounts for each electronic resources person, so we're not all using the same account.

Concern from Rebecca (9/17): We have done a lot of work to include information about our purchases and subscriptions in intota- I am not seeing where this information can be migrated to in EDS for the most part. Here is what we learned (updated 10/2):

1. Per Sean databases are migrated by URL, which explains why our titles are not necessarily migrating as a group. The databases in Intota and the databases in EDS are not identical title lists.
2. We subscribe to specific databases in intota to indicate how/where we pay for things. This information will need to go in our FOLIO ERM.
3. Database level notes (especially important for ebooks, but also for many journals) and title level notes will also need to go in our FOLIO ERM.
4. We use many many statuses in Intota at the title level - many of these statuses indicate information about perpetual vs subscription access, or ceased titles, cancelled titles- losing this information at the title level would be very problematic. We will use EDS to track titles for the catalog, but it has two statuses: "selected" and "not selected". Additional statuses will need to be tracked in FOLIO ERM.

License Storage

Overview

AERLS will use the Cornell box.com account to store finalized licenses and supporting documents. The folder is titled "AERLS License Storage"; as of 31 October 2019, the following individuals have access: Peter McCracken (owner), Liisa Mobley (co-owner), Jesse Koennecke, and Rebecca Utz.



This is *not* a space for storing documents related to negotiating a license or an agreement. It can, however, store any supporting documents associated with completed licenses and agreements.

It is the responsibility of the person who signed a license to submit that license to the License Storage site: either its appropriate folder, or to the folder called "INBOX - Files To Be Filed". Emails that have these documents as attachments can be sent to **INBOX__d8gg0x1ucvoirkpt@u.box.com**, and the attachments will be stored in the "INBOX" folder. The email message and its contents will not be preserved. You'll receive an automated response from Box when the file has been successfully received.

USE THE EMAIL, INBOX__d8gg0x1ucvoirkpt@u.box.com, TO SEND COMPLETED LICENSE FILES AND TITLE LISTS TO BOX.

File Naming Structure

The top level contains four different folders:

- **Content Licenses** - for vendors providing content that we make available to patrons
- **Service Licenses** - for vendors providing services that we use
- **Other Licenses** - for other types of licenses; we'll wait to see how this is used
- **INBOX - Files To Be Filed** - this folder stores files that are waiting to be filed in the proper location. Emails containing such documents can be forwarded to INBOX__d8gg0x1ucvoirkpt@u.box.com, and the attachments will be automatically stored in this folder.

Some of the largest vendors will appear in both folders; if a vendor includes content and services in the same license or document then we should store the license in one folder, and place a note regarding the other in the other folder.

Below the top level, folders will be listed by organization/publisher, using the same organization names we'll use in FOLIO. These should be listed alphabetically. If an organization changes names or relevant organizational structure, we can add a note indicating where to find new documents, such as "Old Name - after 2017-01 see New Name", or "Alexander Street Press - after 2016-06 see ProQuest - Alexander Street Press". Another option could be to leave a boxnote in the folder, indicating where more current files have gone.

If the organization is particularly large or complex, it is perfectly acceptable to create subfolders in the organization folder, regarding the various divisions. However, it should always be clear to any users where they would go to find or store a given file. If it's not clear, then the subfolders may not be appropriate. An example of such structures might be as follows:

- **Content Licenses**
 - **ProQuest**
 - Alexander Street Press
 - Databases
 - Docuseek2 - Streaming Video
 - Text & Data Mining
 - Ulrich's Serials Directory
 - **EBSCO**
 - Databases
 - Flipster Purchases
- **Service Licenses**
 - **ProQuest**
 - Ex Libris
 - Voyager

NB: This step may not be necessary. We'll just have to see.

The organization folder (or subfolder, if present) will be divided into three folder types, though these folders will only be created when content exists to be put in them.

- **Signed Documents** - This should contain the complete, countersigned documents. If a countersigned document is not available, then the 'most signed' document is acceptable
- **Content Documents** - This folder will contain documents that describe the contents in a particular resource if they're not part of the signed license. This folder will contain title lists, in any format provided by the content provider. We should not delete past title lists; instead, we should use standardized naming tools to easily track lists over time.
- **Supporting Documents** - This folder contains license drafts and non-binding documents other than those in the sections above. Documents in this folder don't need to have their filenames updated. Documents can be deleted if they are not needed anymore, such as non-countersigned agreements, after the countersigned agreement has been received.

Individual documents will use the following naming conventions:

- Each file should include the name of the vendor, the type of document, and the date it was signed. Each section should be separated by an underscore, since the date and other parts will be separated by hyphens. CamelCase should be used within each section, as needed. We don't need to include "Cornell" in the names of any licenses.
- Minimize the use of small words like "the" and "of" that add little value other than extending the length of the filename.
- The date should be presented in the YYYY-MM-DD structure, with the date selected being the latest date on a document. If the printed date on the document is May 10, 2019, and one signature date is May 15, 2019, and another signature date is May 16, 2019, then the date used should be "2019-05-16".

- **Vendor_Product_LicenseType_Date**

- The following abbreviations are acceptable and encouraged, though otherwise abbreviations should be limited, if possible:
 - Agrmt - Agreement
 - NERLAgrmt - an agreement signed on our behalf by NERL; we didn't sign it but are bound by it
 - PPR - Public Performance Rights; if we signed a document re this, we'll store it here. Others are [recorded here](#)
 - StrmgAgrmt - streaming agreement, for videos. Maybe includes PPRs, maybe doesn't
 - UP - University Press
- License naming examples:
 - Brill_OutrightPurchaseMasterLicense_2019-03-29
 - Brill_SubscriptionMasterLicense_2019-03-29
 - CambridgeUP_NERLAgrmt_2017-04-01
 - HeatherWhite_Invoice&License_2018-05-18 - *this one is for an individual who provided a single streaming video, but as the Organization, she should have a folder with her name, not the name of the streaming video (the product)*
 - SAGE_MasterLicense_2018-11-30
 - UVa_LicenseAddendum-DanWebster_2019-01-29
 - YaleUP_A&AePortal_SERUAgrmt_2019-05-16
- Title List examples:
 - CambridgeUP_TitleList_2019-02-03
 - SAGE_Ebk_TitleList_2019-06-22
 - SAGE_Ejnl_TitleList_2019-06-23
 - Brill_Ejnl_Entitlement_2019 (for when it is not just title list but includes all years of access to date of the file)

Linking

Each file can have a link that will take one directly to it. This will be useful if we want to store URLs to license documents in FOLIO ERM. However, our default setting is that only those who have shared access to the License Storage folders will be able to use the link. We could change each link so they're available only to anyone with a NetID, but this seems a bit too permissive. To get the link, click "Share" to the right of the file name in question. If it's not already selected, click the "Share Link" toggle to "Enable shared link". The link to the document is highlighted and in the box that appears below the toggle. Note that if you change the toggle to disable the shared link, that URL will no longer work for the document in question.

MARC Records

Task list as of 05/01/2020:

- Complete MARC modification script for EBSCO records (George and Jenn Colt)
- Sign off from cataloging on the MARC modifications (Pam and Jenn Colt)
- Confirm that "do not send MARC record" option becomes a delete in the updates that EBSCO sends ([Peter McCracken](#))
- Consult with IT about the best way to provide an update to the PSL catalog record links (Jenn Colt)
- Retrieve April record set (Jenn Colt)
- Request EBSCO generate URLs with the new linking (Peter McCracken)
- Finish/send "no marc" list before May record generation (Liisa S. Mobley)
- Retrieve May record set ([Jenn Colt](#))
- Understand impact on Rapid ([Jenn Colt](#) [Jesse T. Koennecke](#) [Caitlin M. Finlay](#))
- Load May EBSCO records into Voyager test (Jenn Colt) - serials
- Load June EBSCO records into Voyager test ([Jenn Colt](#)) - monograph
- Upon successful load to test, communicate update to CU-LIB (Peter McCracken)
- Compare EBSCO monograph records to SerSol monograph records in an effort to exclude records that we don't want to load because we source those records from elsewhere ([Adam L. Chandler](#), Jenn, [Liisa S. Mobley](#). We can load into test Voyager before completing this but it would be nice to have a handle on it before loading into production.)
- Load serial EBSCO records into Voyager production ([Jenn Colt](#)/batch processing/e-resources)
- Load monograph EBSCO records into Voyager production ([Jenn Colt](#)/batch processing/e-resources)
- Ask EBSCO to switch to sending update files instead of full load files ([Peter McCracken](#))
- Produce match spreadsheet for PSL web site ([Jenn Colt](#))
- Test matches for PSL (request LTS assistance) ([Peter McCracken](#))
- Send matches to IT (or other implementer if IT needs assistance) ([Jenn Colt](#))
- Identify a pool of records with an established match in FOLIO licenses for John C to use as test cases for TOU display. ([Jesse T. Koennecke](#))
- Clean up EBSCO vendor folder after testing is complete ([Jenn Colt](#))

Sample records after ingest to test Voyager

Serial

=LDR 01888cas a22004812a 4500
 =001 11018314
 =005 20200420162649.0
 =006 m\\o\\d\\
 =007 cr|unu|
 =008 961219c19979999caumr\p\s\\o\\a0englc
 =022 \\a1092-1303
 =035 \\a(OCOLC)36114650
 =035 \\a(EBZ)ebs37347e
 =040 \\aNSDP \$beng\$dEBZ\$dNIC
 =042 \\sansdp pcc
 =050 14\$aHF5548.32
 =130 0\$aInternet & electronic commerce strategies (Online)
 =222 \0\$aInternet & electronic commerce strategies
 =245 00\$aInternet & electronic commerce strategies
 =246 1\1999- have title:\$aInternet & e-business strategies
 =246 3\$aInternet and electronic commerce strategies
 =260 \\aCarlsbad, CA :\$bComputer Economics
 =300 \\a1 online resource
 =310 \\aMonthly
 =336 \\\$atext\$2rdacontent
 =337 \\\$acomputer\$2rdamedia
 =338 \\\$aonline resource\$2rdacarrier
 =362 1\$aBegan in 1997.
 =506 \\\$aLicense restrictions may limit access.
 =650 \0\$aElectronic commerce\$vPeriodicals.
 =650 \0\$aInternet\$vPeriodicals.
 =773 0\1EBSCO Publication Finder \$dEBSCO\$o6083
 =773 0\1EBSCO Publication Finder \$dEBSCO\$o4643
 =773 0\1EBSCO Publication Finder \$dEBSCO\$o4460
 =773 0\1EBSCO Publication Finder \$dEBSCO\$o4591
 =776 1\1Internet & e-business strategies (Online)\$w(DLC) 2004255368\$w(OCOLC)45856213
 =776 1\1Internet & electronic commerce strategies\$x1092-1303\$w(OCOLC)36114650\$w(DLC)sn 96003556
 =856 40\137347\$yClick here to find online versions of this title.\$u<https://search.ebscohost.com/login.aspx?CustID=s9001366&db=edspub&type=44&bQuery=AN%2037347&direct=true&site=pf-live>
 =948 0\20200420\$bi\$dbatch\$elts
 =948 1\20200420\$bs\$dbatch\$elts\$fj
 =948 3\20200420\$hEBSCO\$iebsco_serial_sample.mrc.uc
 =952 \\\$serv,remo\$hNo call number
 =995 \\\$aNoEx

Mono

=LDR 01009nam a22002772 4500
 =001 11018213
 =005 20200420162542.0
 =006 m\\o\\d\\
 =007 cr|unu|
 =008 200319s201uuuuux\||\s|||eng|d
 =035 \\a(EBZ)ebs4336671e
 =040 \\aEBZ\$beng\$dNIC
 =042 \\\$amsc
 =245 00\$a#10 Hawaiian explorations, hy 4291 - hy 4350, May 24 - 27, 1902
 =300 \\a1 online resource
 =336 \\\$atext\$2rdacontent
 =337 \\\$acomputer\$2rdamedia
 =338 \\\$aonline resource\$2rdacarrier
 =506 \\\$aLicense restrictions may limit access.
 =773 0\1EBSCO Publication Finder \$dEBSCO\$o1699
 =856 40\14336671\$yClick here to find online versions of this title.\$u<https://search.ebscohost.com/login.aspx?CustID=s9001366&db=edspub&type=44&bQuery=AN%204336671&direct=true&site=pf-live>
 =948 0\20200420\$bi\$dbatch\$elts
 =948 1\20200420\$bs\$dbatch\$elts\$feb
 =948 3\20200420\$hEBSCO\$iebsco_mono_sample.mrc.uc
 =952 \\\$serv,remo\$hNo call number
 =995 \\\$aNoEx

Instructions for obtaining records

Information from EBSCO regarding their MARC records service:

Hi Jesse,

Thank you for ordering EBSCO MARC updates.

I have been assigned the set-up of your Holdings Management MARC file subscription and am writing to inform you that I have created a standardized MARC profile for your institution. At this time, I have made available a full set of MARC records and have enabled monthly updates for your account. You will find this set has been split into two .marc files, as we have created separate files for serials and monographs. You will find instructions for accessing the records provided below.

RECORDSET FOR HLM MARC UPDATES

=====

The following files are available on the ftp site listed below. These represent records from your EBSCO HLM holdings as of 01 Jul 2019 @ 16:50.

FILE(S): ebz-s9001366-20190701.zip (177,283.1K)
ebz-s9001366-20190701.csv (300,340.1K)

FTP SERVER: [ftpatoz.ebsco.com](ftp://ftpatoz.ebsco.com)

USER ID: ftpatoz

PASSWORD: at0Zftp1t

DIRECTORY: s9001366

FTP URL: <ftp://ftpatoz:at0Zftp1t@ftpatoz.ebsco.com/s9001366>

CONTENTS: Complete replacement file.

In addition to the standardized MARC records, there are customizations we can provide. For more information, please review this FAQ: https://help.ebsco.com/interfaces/Full_Text_Finder/Holdings_Management_FAQs/EBSCO_MARC_Records_FAQs

If you would like to receive customized MARC records, please complete the MARC questionnaire linked below. Once your information is received, we will begin the customized setup process for your institution.

Link to form: <http://widgets.ebscohost.com/prod/forms/?formid=279384>

Username: jtk1@cornell.edu

Password: password123

Please let me know if you have any questions or require any additional information.

Thank you,

Parker Conrad

Senior Technical Support Representative

EBSCO Information Services

1 (800) 758-5995 | support@ebsco.com <mailto:support@ebsco.com>

EBSCO Support Site - connect.ebsco.com

EBSCO Tutorials: support.ebsco.com/tutorials/

Peter2 needs to work on these.

Comments on records and customization

Notes & comments from working through the questions in the EBSCO MARC Customization Form:

1. They "strongly encourage" us to send a sample MARC record. I guess we could do this, by modifying an existing Serials Solutions record. But we need to go through the options to determine what we want to select, before creating a sample MARC record based on those options.
2. Do we have a specific location where we want the records delivered, or do we want to download them from EBSCO's FTP server?
 - a. A: We will prefer to collect them from the FTP server; LSTools will do this for us.
3. What kind of 856 linking do we want?
 - a. "Link thru Full Text Finder" – One record with multiple links per resource in HLM – so, two links if it's in JSTOR twice? and four links if it has four different coverage dates in Project Muse? For six links total?
 - i. I think that to them, "resource" refers to the title in question, not databases that hold that title
 - b. "Link to Full Text Finder" – One record with just one 856 link - going to Full Text Finder
 - c. "Standard URL" – One record with multiple links that go directly to resources and bypass HLM - but does that mean this is the same as Option 1 but with fewer links to get to content?
 - d. A: We all prefer the linking to e-journal portal interim page. We may try this and see what people think or say.
1. "Additional options":
 - a. Deliver Updates Only? So, deliver "change", "add", and "delete" files separately? If you say 'no' does that mean all-new files each time?

- i. We want three separate files; we don't want a fresh load every time.
 - b. Include Custom Titles? These are items not tracked in their global knowledgebase; they're managed locally
 - i. No, to start. will add later if we so choose. Get some clarity to be sure.
 - c. Include all 035 fields? Not appropriate if we have separate print and e records, as this would keep OCLC numbers, and then records might match on them. Unless we match on something else, and use 035 to identify related records.
 - i. Yes, for now.
 - d. Move a print ISSN from 022\$a to a new \$y?
 - i. Yes
 - e. Include Key Title in 222? For CONSER records.
 - i. Yes
 - f. Segregate monographs? Presumably generate separate record sets for monos and journals
 - i. Yes
 - g. Create Uniform Title? I think this creates a title with "(Online)" after it for these records, to differentiate from existing print records
 - i. Yes
 - h. Use "to present" in Coverage? - no explanatory note; I guess this is instead of?
 - i. Yes, if it's true!
 - i. Limit subject headings to LCSH and/or NLM Subj Headings, or use all available headings?
 - i. What sorts of subj hdgs exist? Can you provide some examples and some source info? We def don't want non-Engl subj hdgs.
2. Customize 856 fields. Their standard 856 is as follows: "\$3Full text available: 1995 - 2000.\$zAvailable in Academic Search Premier.\$uhttp://search.ebscohost.com/direct.asp?db=aph&jid=QUG&scope=site\$y Full text available from EBSCO"
- Do we want something different? If so, what?
- a. Do we add proxy server to URLs in 856\$u field?
 - b. A: we will do proxying from the ejp page. Text: "Click here to find this resource online." "Click here for online availability." "Click here for online versions of this resource." URL will go to EJP page.
3. What other field customizations do we have?
- a. Gary will take a look at this part.
4. Any additional comments?

Please add any comments you might have about these options.

Records will still match on 035s, correct? Can we improve **EBSCO's** records, when we can identify ways of making them better? If eb can let us (and others) improve brief and other records, that will be a benefit to all.

Update, 10/21/19:

I compiled the information I have, and submitted a form on 10/21 which provided a profile for us in creating MARC records. We'll see what they look like, and will request edits, if needed, from there. PMC

11/8/19:

Analysis of records they sent around 10/30: First, URLs aren't what we want. They sent the following record, for instance, which has two links – the first goes to NewBank, but not at the title level for this newspaper. The second does go to the title level. But in any case, we want a link that goes to the A-to-Z list, instead, so the link should go to <https://search.ebsco.com/?alphamenufacet=&count=20&custId=s9001366&groupId=main&includeFacets=true&offset=1&orderBy=relevance&profileId=pfui&resourcetype=&search=Jacksboro%20Herald-Gazette&searchField=titlename&searchtype=contains&subjectFacetSchemaFilter=iibrary%20of%20congress> or some abbreviated version of that search. It could do it just on the title ID or something. And there should only be one link for each record; it should go to the journal in A-to-Z, and *there* you'll find sources and dates.

```
=LDR 00951nas 22002292 4500
=001 ebs11798599e
=003 EBZ
=006 m\|||||d\|||||
=007 cr|unu|||||
=008 191030\|||||xx\uu\ps\||||0\|||0engld
=035 \a(EBZ)ebs11798599e
=040 \aEBZ
=042 \sams
=130 0\saJacksboro Herald-Gazette (Online)
=222 \0saJacksboro Herald-Gazette
=245 00saJacksboro Herald-Gazette$h[electronic resource].
=245 \h[electronic resource]
=538 ##saMode of access: World Wide Web.
=773 0\stAmerica's News $dNewsBank
=773 0\stAccess World News Research Collection $dNewsBank
=856 40$yClick here to find online versions of this title.$uhttps://resolver.ebscohost.com/Redirect/PRL?EPPackageLocationID=920.11798599.25141818
&epcustomerid=s9001366
=856 40$yClick here to find online versions of this title.$uhttps://resolver.ebscohost.com/Redirect/PRL?EPPackageLocationID=561.11798599.25137429
&epcustomerid=s9001366
```

We should likely clear out the 773s, I think, since they'll lead to a lot of unnecessary changes, when content is added or removed. Do the 773s matter?

Update, 22 November

I sent an updated set of edits to Colin O'Kane at EBSCO, and I think that'll create a set of records that we can work with. Gary and Pam will want to look them over when they arrive. These were only e-journals (though there are a bunch of monographic proceedings mixed in there, too, but no monographs that aren't proceedings), so I asked about generating monograph records. I requested the following:

- Delete the second 245s that only have \$h[electronic resource]
- Add a 506 that reads "License restrictions may limit access."
- Delete all 538s
- Delete all 773s
- Fix 856 links to go to Publication Finder (i'd indicated they should go to Full Text Finder, the link resolver) - but we're using the new Pub Fndr interface, so they may need to do something special to make that work.

Resources for which we DO NOT want to receive EBSCO MARC records, but still want them tracked in the EBSCO knowledgebase

- List here - Liisa is working on a [list of NO MARC records needed from Ebsco](#)
- And here

Off-campus access

We need to notify all content providers that they need to update their IP lists. If they follow our profile on theIPRegistry, that will work best for all. This won't always be the case, however.

See the following ERSM page for more information about contacting vendors: <https://confluence.cornell.edu/x/CBPpB>

Notes that I cut from the summary on the main page:

We need to investigate and select the best option for off-campus access to electronic resources. We currently use a locally hosted EZproxy solution, and have looked at both an OCLC-hosted EZproxy implementation, and a SaaS OpenAthens subscription, through EBSCO.

We had webinars with OCLC, for their hosted EZproxy solution, and with EBSCO, for OpenAthens, in the first two weeks of July. We learned a great deal about both solutions, and asked a lot of privacy-focused questions, as well. participants in those calls included: Peter McC, Adam Chandler, Jerry Shipman, Phil Robinson, Amy Blumenthal, and Jesse Koennecke.

The initial report we submitted [is here](#); Xin had follow-up questions which we addressed. The final set of questions, and replies to Dianne, will be added here after it's submitted.

The contract with OCLC is nearly complete. On 10/14, a group consisting of Peter McC, Phil R, Jeremy C, and Paul Owens met to discuss the implementation plan. We agreed to focus on keeping the URL for the proxy server the same as we currently have. This will mean that if LibGuides have the direct link, instead of a resolver/PURL link, they will still work. However, it means we'll need to do a switch-over on one day – when we switch the DNS to point from our IP to OCLC's IP. We also need to maintain the wildcard cert ourselves, but that's doable. In the next 3 months or so, we're going to need to contact all 1500 vendors and ensure they have our added IP address. We need to wait until OCLC assigns it to us, tho.

Review of New EZproxy Linking

COMPLETED! THANKS FOR YOUR ASSISTANCE.

BACKGROUND:

EZproxy is a program that allows patrons off-campus access to library e-resources that require proof of Cornell affiliation.

The IP address for the patron's computer is often used for this proof; we send our vendors a list of Cornell's campus IP addresses, and if the patron's IP address is among them, the patron is immediately given access to the e-resource. Our catalog links for e-resources include a script that routes an off-campus patron's connection through a "proxy server", which assigns its own IP address to the patron's connection, so that when they arrive at the e-resource platform, that platform detects the approved proxy IP address and grants the patron access. EZproxy is the software that manages this process.

Right now, we manage EZproxy ourselves, and our current proxy server's IP address is included on the spreadsheets already in our vendors' possession. As part of Project GROVER, we're shifting to have OCLC manage this for us; this means every e-resource platform must add the new IP address for OCLC's Cornell-dedicated EZproxy server. E-resources staff have contacted many of these vendors, but there are still more to contact, and we need to verify that the changes have been updated successfully.

THIS PROJECT:

Check to see if the most important electronic resources have added the new IP address, by trying to access each of them. On a shared spreadsheet, record if you were able to access them, or if you couldn't, plus any notes about problems you experienced.

SPECIFIC STEPS:

1. Open the spreadsheet in Google Docs. (We need to do it in Google Docs so that everyone can edit the document.)
 - a. To access the spreadsheet, go to <https://docs.google.com/spreadsheets/d/1SGwibGD3qzKqH29mNpLI0Enw9PxLBU5MGDIauO3TNN4/edit?usp=sharing>.
2. Select a section that others aren't working on, and click on a "Resource Name" that doesn't yet have a result in the "Result" column. Clicking on the Resource Name will open that resource in a web browser. The URL will start with "<https://cornell.idm.oclc.org/login?url=>" and then will include the URL of a particular online content provider.
 - a. If you haven't logged in through the Cornell proxy server yet, you'll be asked to log in with your NetID and password, and use DUO's 2-Factor Authentication, to confirm the login.
3. At this point, you'll most likely see an error message about an unsafe connection. You might see an error message about problems loading the page. Each is described below.
 - a. **You may well see an error message, saying that the site you're going to is not safe. This isn't true;** the problem is caused by the lack of an SSL certificate on the site. When we make the switch to the OCLC EZproxy server, this problem will be resolved.

Below are how it will likely appear in a Chrome browser, or in a Firefox browser. Edge, Safari, and other browsers will be similar.

Chrome browser views:

Firefox browser views:

In Chrome, the error message you'd see looks like this:

Your connection is not private

Attackers might be trying to steal your information from **www-acousticalsociety-org.cornell.idm.oclc.org** (for example, passwords, messages, or credit cards). [Learn more](#)

NET::ERR_CERT_AUTHORITY_INVALID

[Advanced](#) [Back to safety](#)

Click the "Advanced" button, and then the information below will appear.

This server could not prove that it is **www-acousticalsociety-org.cornell.idm.oclc.org**; its security certificate is not trusted by your computer's operating system. This may be caused by a misconfiguration or an attacker intercepting your connection.

[Proceed to www-acousticalsociety-org.cornell.idm.oclc.org \(unsafe\)](#)

Click this text; it's *not* unsafe.

Click the "Advanced" button, then click the "Proceed to ..." button. Clicking this link is *not unsafe*; we know why the error appears and it'll be resolved when we switch the IPs and URLs.

In Firefox, the page will look something like

Warning: Potential Security Risk

Firefox detected a potential security risk. Attackers could try to steal information from this page. [Learn more...](#)

[Learn more...](#)

login.cornell.idm.oclc.org uses an invalid certificate. The certificate is not trusted because Error code: MOZILLA_PKIX_ERROR_SELF_SIGNED. [View Certificate](#)

Click the "Advanced..." button, and the information below will appear.

Click on "Accept the Risk and Continue".

b. In some cases, however, you won't see the "unsafe" pages above; instead, you'll see a very plain webpage that starts, "Oops! It looks like you have attempted to view a page that has not been configured for access." It looks like this:

Oops! It looks like you have attempted to view a page that has not been configured for access.

If you are a library patron...

Please contact your library and provide the name of the resource you were trying to access and the Host line below so

Host <https://www.eupublishing.com/action/showPublications?display=bySubject&pubType=journal>

If you are an EZproxy administrator...

To allow <https://www.eupublishing.com/action/showPublications?display=bySubject&pubType=journal> to be used in

1. [Contact Support](#) to have this host added.
2. If you are still testing and in implementation, send an email to your implementation lead to have this host added

For more information, please also see [Starting Point URLs & config.txt](#).

If you would like to customize the text or update this page, please [Contact Support](#). For additional details about this p

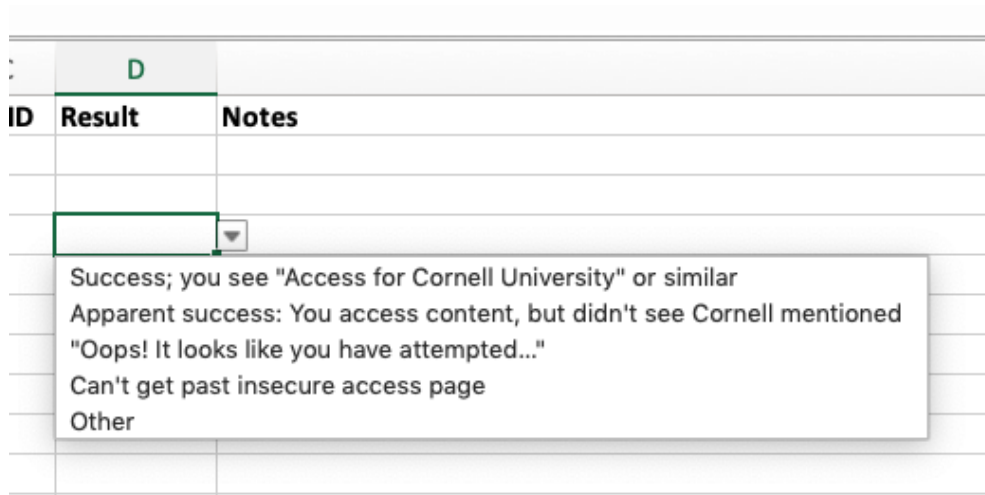
c. Finally, you may see something completely different. It's possible that the resource has moved, or we don't subscribe anymore. Please let us know what you find, so we know which ones to investigate more closely.

4. Figure out what sort of access you've found at the website. We'll generally find just a few common results. These include the following:

- a. You get access to the site, and you see a note that "Access is provided by Cornell University" or some other similar text that indicates Cornell subscribes to the service.
- b. You get access to the site – and you can get into the paid content of the resource – but you don't see any mention of Cornell on the home page. *If you don't see "Cornell" mentioned anywhere, you can always use Ctrl-F to open a "find" box, and then start to spell out "Cornell". If the word is on the page, this will find it.*
- c. You see a message from OCLC that starts, "Oops! It looks like you have attempted..."
- d. You cannot get past the webpages that warn of insecure access.
- e. The URL doesn't seem to be correct, because what you see doesn't seem to have anything to do with the name of the resource that you clicked on, in the spreadsheet.
- f. Something else

5. Record what you found. Go back to the spreadsheet and record the information you've found. Specifically:

- a. Put your NetID in the "NetID" field, so we can check in with you if we have questions about any results.
- b. In the "Result" field, click on the down arrow to the right of the cell, and you'll see several possible options to select. Select the most appropriate response, to indicate the access you discovered. The dropdown list will look like this (one more option has been added since I took this screenshot):



c. If you choose "Other", or have other information to share, please record that in the "Notes" field.

FOLLOWUP WORK:

Once we've completed this review of the most important e-resources, we'll be ready to switch on the OCLC-hosted EZproxy service, and have OCLC manage it from that point forward. They are better able to handle the complex stanzas, and can address many issues that we cannot. This will improve the reliability of individuals getting access to all of these resources. Your contributions in checking to see what works, and what doesn't, is a huge help in ensuring we are providing as much access as possible. Thank you!

If/when you have any questions at all, please don't hesitate to contact Peter McCracken, p6m@cornell.edu

Terms of Use Data

To do list as of 5-18

- [Jesse T. Koenecke](#) and [Emma Raub](#) set terms of use weight and visibility
- [John A. Cline](#) will update code to respect weight and visibility
- [John A. Cline](#) will set up default terms to display when no terms are available. EBSCO agreement and Proquest agreements then bigger journal subscriptions.
- [Emma Raub](#) prioritize adding agreements to important licenses
- [Jenn Colt](#) will load marc for serial records first
- Single terms of use page and each package name should proceed the terms of use for each package on the terms of use page
- [John A. Cline](#) will write up a JIRA issue: <https://culibrary.atlassian.net/projects/DISCOVERYACCESS/issues/DISCOVERYACCESS-6014>
- Jesse, Jenn or Peter will make sure John gets EBSCO credentials as soon as possible after the upgrade to Fameflower

05/11 Definition of the "public lookup" view of license terms from Owen: "The publicLookup only returns information for current agreements (based on date and status) or perpetual agreements (regardless of status) and is based on the terms expressed in the Controlling license and any amendments that have been applied" Does this match what we want?

11/22: The ERM tickets mentioned below are expected to go live in Edelweiss. This will allow ToU data to be pulled from FOLIO and used elsewhere. This is excellent news; what we need now is to have this information displayed in Publication Finder. This becomes a question for EBSCO, to see if they can edit the Publ Finder interface, so that it shows the ToU data in the relevant entries in Publ Finder. But in a discussion on MARC records on 11/21, we realized there are some bib records that offer ToU data in other places and other formats. I need to compile a list here of all of the ToU sources. To the best of my knowledge (though the list seems to grow on its own), this is a list of all types of records that link to the existing ToU data, with comments on how that source will be replaced:

- Electronic resources tracked by Serials Solutions MARC records: These records link to ToU data based on the dbcode and providercodes in the 856\$1 fields. (The information is also repeated in the 899s.) This data will be replaced by links to ToU data pulled via API from FOLIO into the EBSCO Publication Finder page. To make this happen, we need to do the following:
 - Figure out who at EBSCO can edit our Publ Finder interface, and have them add code to pull data from FOLIO by API
 - Determine the API calls required to locate and return the ToU data from FOLIO
 - Ensure that default ToU data exists in FOLIO for every resource that we're tracking, and that we can track which ones have been updated (mostly so we know which ones *haven't* been updated, and need attention over time).
- Electronic resources tracked by MARC records from other vendors: In the past we have used the Serials Solutions dbcodes and providercodes to generate ToU data for resources not tracked by Serials Solutions. The ToU data is stored in Intota, and delivered through a link from the Voyager record, based on those codes. After January 2020, the data won't be available in Intota any longer. We'll need to find another solution. If we continue to offer links from Voyager, then we have two different ways that people would find ToU data - either from Voyager or from Publ Finder - and this would be determined by whether or not the MARC record came from Serials Solutions, which isn't a great decider. We could add a link for the electronic resources above from Voyager to ToU data in Publ Finder, and then for other stuff, from the same source to a different source. Gotta think this one through, carefully. But if we choose this path of continuing to provide links from Vgr, we'd need to do the following:
 - After removing all Serials Solutions records from Voyager, search for 856\$1 to determine what dbcodes and providercodes remain in Voyager and need a different solution
 - Create a static table that holds necessary information about the specific electronic resources found above, so links from Voyager can access that table
 - Update the static table as needed; this shouldn't be too hard as there won't be too many resources here and they won't change too often
 - This solution can stay in place for as long as Voyager is here; when it leaves, we'll need to find a solution for it.
- Database-level records created in-house, which remain in the catalog and have database-level ToU links similar to those just above. We'd probably use the same procedure as above for these records.

Jesse and Peter McC met on Oct 11 to brainstorm methods of serving up this data, and we were pleased to find that several JIRA tickets address this specific issue, and we should be able to make this service available fairly quickly.

We determined that, right now, the data feed from Summon does not seem to be working, so any improvement should be a step forward.

There's a FOLIO wiki page titled "[How to design batch API](#)" which may be useful, but the specific ERM tickets are [ERM-356](#), Expose License Terms over API, and [ERM-361](#), Support API for retrieving license terms based on a resource identifier.

If we can define where to direct a link into FOLIO, to collect this information, then we should be able to direct EBSCO staff in what we want to see in direct links from their MARC records and Full Text Finder results pages.

Jesse is leading up this project, and will see what he can figure out to get it working.

(updated 10/12)

URL Proxy Review - Will it Proxy?

BACKGROUND:

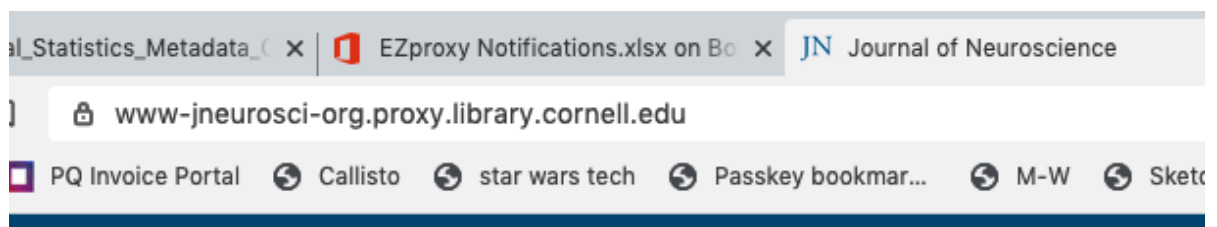
We continue to review electronic resources that may need to be proxied through the new OCLC-hosted EZproxy service. We have a long list of electronic resources that may or may not need proxying – some of these are resources that no longer exist, or we've cancelled our subscription, or the stanza is outdated (usually because the electronic resource has changed its URL), or the resource doesn't require any proxying in the first place. We have a list of about 1000 URLs that may or may not link to subscribed content that needs proxying. We want to figure out which of those do need to be proxied.

THIS PROJECT:

NB: This project is different from the "[Review of New EZproxy Linking](#)"! That project looks at the most important electronic resources; this one looks at the remaining ones. In this project, you'll review our list of remaining electronic resources URLs, to see if they take one to a valid resource, to a dead end or some other problem, or they need further investigating.

SPECIFIC STEPS:

1. Open the spreadsheet in Google Docs. (We need to do it in Google Docs so that everyone can edit the document.)
 - a. To access the spreadsheet, go to
2. Select a section that others aren't working on, and click on a "Resource Name" that doesn't yet have a result in the "Result" column. Clicking on the Resource Name will open that resource in a web browser. The URL will start with "<https://proxy.library.cornell.edu/login?url=>" and then will include the URL of a particular online content provider.
 - a. If you haven't logged in through the Cornell proxy server yet, you'll be asked to log in with your NetID and password, and use DUO's 2-Factor Authentication, to confirm the login.
3. From here, you'll get a range of responses. These likely include the following:
 - a. An "Access provided by Cornell University" or similar message. This is good; it indicates we have access to the resource in the old system, and we need to be sure we establish access on the new proxy server, as well.
 - b. The link successfully went through the proxy server, but we might not have access. In this case, you got to the website in question, but you don't see an "Access provided by Cornell University"-type message. Take a look at the URL; you can see that it has successfully gone through the proxy if it has hyphens in the first part of the URL, like this:



The original URL was <https://www.jneurosci.org>, and the proxy server appropriately changed it to <https://www-jneurosci-org.proxy.library.cornell.edu>. This could happen if we no longer subscribe to the service in question, or if they don't display any indication that an institution provides access.

- c. The resource has moved, so the URL is now wrong.
- d. The URL is wrong – except that it isn't! This is a tricky one - in some cases, the proxy URL was built wrong, because it failed to include the "https://" part. For example, the link for **only keep this link if you can't correct these URLs yourself**.
- e. The URL is wrong, and takes you to a broken or empty page. For example, the URL for the entry "Experimental Biology and Medicine" is <http://proxy.library.cornell.edu/login?url=http://www.ebmonline.org>. If you go to that website, either through the link resolver or to <http://www.ebmonline.org>, it will redirect to <https://ebm.rsmjournals.com>, and then return a 404 error, indicating that there's nothing at the URL. Sometimes it won't redirect anywhere; it'll just return the 404 error. The resulting webpage might look like either of these pages, or something similar (it'll vary a bit from browser to browser):

Once we've worked through this set of links, we'll have a better idea of which ones need to be proxied, which ones need some investigating, and which ones need ignoring. We'll take care of each of those steps, and further improve off-campus access to these important electronic resources.

If/when you have any questions at all, please don't hesitate to contact Peter McCracken, p6m@cornell.edu

Workflow for Determining EZproxy Preparedness

<<<< This needs to be updated to reflect the fact that we've implemented OCLC-hosted EZproxy. There is still work to be done here, but the testing process has now changed. >>>>

We are combining EZproxy usage, from our EZproxy status page, with confirmation that content providers have added our new EZproxy IP range.

Start by opening the spreadsheet "EZproxy Analysis" in box.com at <https://cornell.app.box.com/file/642393984593> . I'm going to call this "the main doc" in here, for simplicity. Open it in Excel Online so multiple people can work on it at the same time, and so all edits are saved to the original. If the subgrouping on the far left of the spreadsheet does not appear correctly, you can make an edit, like temporarily change one of the fields in Column N to "Y" for a moment, which will correct this.

We want to figure out how many "Y"s we can put in the subgrouped Column N fields. That will change the percentage of access that's represented in Column O. You'll come across a range of problematic resources, so open an email to Peter McC, and record problematic URLs, resources, etc., in there.

We have a few ways of determining if we can put a "Y" in Column N. If you want, you can look at the Google Sheet titled [EZproxy Testing Sheet](#). I have felt that the EZproxy Testing Sheet isn't always accurate, but it may be sufficient for us in this case. If the resource is listed here with "Success!" in the Results column, then it can earn a "Y" in the main doc Column N. For example JSTOR has "Success" in the Google Sheets doc, so I added a "Y" in the EZproxy Analysis file, in row 1270.

I prefer to use the path below for testing; it has been working pretty well for me. In most cases, it's fairly quick.

1. In the main doc, open the subgroup to determine the most commonly-used URL (to open the subgroup, click on the "+" sign to the far left of spreadsheet. so, for "ovid.com", click on the "+" to the left of "4031". You'll see there are many lines within this subgroup that aren't displayed until you click on the "+" sign.)
 - a. As we get further into the spreadsheet, we'll find more resources like winefiles.org, which have gone out of business. Or, we may have canceled our subscription to the service. In these cases, make a note of the lack of access, in column P, and put the name of the resource in the email to Peter McC.
2. Open that URL in a new browser, so you can see what it looks like when you don't have institutional access.
3. In a new tab, open the same URL, and then use the [Passkey bookmarklet](#), to see what Cornell access looks like. This helps identify if branding exists, or what the difference look like when you have an institutional subscription.
 - a. At times, I had to explore to figure out what I can access when logged in as Cornell. For example, the home page may not be different for those who are logged in and those who are not. The difference may not appear until you try to access an article, for example. I would then do the same on the first browser tab, which is not logged in, and confirm that I could **not** access that content when not logged in. I could then repeat that on the tab described below, and determine if I could or could not get access to the same content, when logged in through the OCLC proxy server.
4. In another new tab, go to cornell.idm.oclc.org/login?=__ (that same URL), to see how OCLC handles it. Click thru the warnings as described in the prior project at <https://confluence.cornell.edu/x/lxjEFg>, and see if you get to branded content. If you do, yay; mark a "Y" on the spreadsheet for that resource and move on. If you don't, work through the steps above or below to figure out what might be the problem. If you can't resolve it, record the issues at the bottom of this page, under "Specific unresolved issues".

Here are some of the problems you might see, and how to troubleshoot them:

If you get the "Oops! It looks like you have attempted..." message, then that *might* mean that the resource doesn't have a proxy stanza at OCLC. If you have access, check the local proxy config file, to see what we're using. For instance, we might not have www.publisher.com, but instead we have journals.publisher.com, or content.publisher.com. In that case, you might find that OCLC also has only journals.publisher.com, or content.publisher.com, so in fact they do have a stanza. But if you're not sure, just let me know and I can look closer. Put information about the resource in the email to me, and I'll notify OCLC of the missing stanza. Column L indicates if the resource has an OCLC stanza or not, so you should mark an "N" in Column L for the resource in question.

If you're able to get through the OCLC proxy server, to the resource, but then cannot get to content, it's important to pause and figure out where you are and what you can do. Here are a few possible steps:

1. Check to see if access works. That is, double-check the work of those who worked in the Google Sheets doc. Take the URL of the resource in question, and append it to the OCLC idm URL. You can open the sub-group on the main doc, by clicking on the plus sign to the left of the row number, to see all of the URLs within the stanza. Use the most common ones that are listed there. For Science Direct, in row 1302, I can see that 710k clicks, of 882k total, were through www.sciencedirect.com, so clearly that's an important URL.
 - a. Append the content provider URL to the idm URL (<https://cornell.idm.oclc.org/login?url=> – so, <https://cornell.idm.oclc.org/login?url=https://www.sciencedirect.com>, and then log in thru Duo, if needed. You'll see the "Your connection is not private" warnings; click through Advanced, etc.
2. In working on Science Direct, I kept ending up at a Science Direct-generated error page. To troubleshoot this connection issue, I'd jump back a step, and go to www.sciencedirect.com and then apply the passkey bookmarklet / or, go to <https://proxy.library.cornell.edu/login?url=https://www.sciencedirect.com>. Using passkey and Duo, I was able to get to a CUL-branded page. So this suggests that Elsevier *does not* have our OCLC IP address.

- a. The [EZproxy Notifications file](#), an Excel spreadsheet in Box, in which we've been tracking who we've contacted and when, can be useful for determining what's been done for a particular vendor. In the case of Elsevier, at line 52, they are tracked in the IP Registry. Problems with content providers not being tracked in the IP Registry have been addressed, and these should work now.
- b. The [Additional_Statistics file](#), also an Excel spreadsheet in Box, can provide contact information, though its focus is really on COUNTER stats, not admin console access – but sometimes it's the same path. [FOLIO](#) can also provide contact information, at times.
3. It may be necessary to get a Cornell-specific, vendor-specific URL from [the CUL PURL server](#). You will need to know the PURL ID, most likely drawn from Voyager. For Science Direct, I looked at that PURL, misc/3846621, and found that, unlike Factiva, it does not have a unique token associated with the resource URL.
 - a. If it does require a unique token, then you'd want to create a URL with the proxy prefix "<https://proxy.library.cornell.edu/login?url=>" followed by the destination URL (which includes the token) in the PURL server.
4. Sometimes the URL in the spreadsheet isn't a great example, even if it's the most popular. This is a reflection of proxy traffic, so if every Science Direct article pulls a piece (or 20) to www.elsevier.com

If you're trying to figure out if OCLC has the URL in a stanza, you can go to <https://cornell.idm.oclc.org>, and then look at the HTML source, so you can see the URLs that are added underneath the resource names. Take the most common URL, do a Ctrl-F and search for that URL in the HTML source. If you find it there, add a "Y" to Column L.

The cumulative % in column O shows the amount of EZproxy traffic through vendors for whom we know that they are proxying our access. If there's no "Y" in the field in Column N, then it is highlighted pink.

As we work our way down the file, we're going to find it more and more useful to check the actual proxy file itself. That page requires some additional authentication, but I copied its contents to [a new Confluence page](#). Use this page to determine what portion of the stanza *actually* needs proxying. For instance, when working on a .edu, .gov, or other domain where you think there isn't much that could be proxied, check the proxy file itself, to see what was actually intended to be proxied. For example, for "usda.gov", which has dozens of proxied stanzas in the traffic file, you can look at the config file and determine there are only two stanzas that cite usda.gov:

```
Title  National germplasm depository
URL    http://www.ars.usda.gov
Domain ars.usda.gov

Title  New patterns of hispanic settlement in rural America
URL    http://www.ers.usda.gov/publications/rdr99/rdr99.pdf
Domain usda.gov
```

In the second case, the resource itself is no longer available at that URL. I looked it up in the catalog, and luckily there's a GPO PURL to get one to the resource, plus the ers.usda.gov link. I asked Pam S to remove the second, since it's no good and there's still a good link to it in the catalog. We don't need to be proxying any of that traffic.

Text to send to publisher:

Since we're now dealing with small publishers, I think we shouldn't bother with telling them about IP Registry; we just want them to add the IP address. Use the following text, or edit it if you prefer. (If you're not Peter McC, feel free to leave a note on the spreadsheet in Column P, stating "need to send ip address to vendor" or something similar; I can follow up with each vendor.)

Greetings -

Please add the IP address, **132.174.252.179**, to the Cornell University account for this service. We have recently switched to OCLC's Hosted EZproxy service and need to have this IP address included with the others in our account. This IP address will provide safe and reliable access for our off-campus users to your resources, restricted, of course, to appropriate members of the Cornell community.

Please let us know when the address has been added, so we can test and confirm that our patrons are able to access your resources. Thank you very much.

Specific unresolved problems, from most traffic to least:

The following entries represent unresolved issues with some of the largest content providers (by traffic) on the list. The usage goes down pretty quickly; it's a very, very, very long tail. But if there's information to add about a particular resource – especially the Testing Path, so someone doesn't need to re-figure out how to confirm access each time – it can make life easier for those who follow.

Col A Line #	Content Provider	Notes and Comments
110	APA / Psycnet	Someone noted on the spreadsheet: "PsychInfo and PsycArticles are EBSCO; PsychTests is in OCLC but I can't tell via our own ezproxy what we have access to" I removed this on 5/26, and updated note to read: "test is at psycnet.apa.org , with or without the proxy. PMc sent IP address on 5/26. " This is for psycnet via the APA website. If you go through the current proxy server, you get access. See https://psycnet.apa.org versus https://proxy.library.cornell.edu/login?url=https://psycnet.apa.org . The former represents failure; the latter, success.
61	ibisworld.com	Sent note in April, but we still don't have access. Checked again, and sent another notice, 5/21. Testing path: at https://www-ibisworld-com.cornell.idm.oclc.org/ , success will show a "Start Your Search Here" message and search box, after a "My IBISWorld" preparation screen. Failure will show "Find the Industry & Market Research You Need Today" message, and possibly "account_circle" in top left corner.
67		
68	Magnolia Press	FIRST QUESTION: Do we send them money? Is there a difference when one is logged in? Much (all?) of it appears to be OA. No email contact found there; would want to get that from Vgr, perhaps, if needed.
86	NBER.org	Need to send IP address to vendor; done on 5/27. Testing path: at https://www-nber-org.proxy.library.cornell.edu/ , click on "This Week's Working Papers" under "Frequently Requested Items, in the top right of the main text window. Scroll down to "Three Myths about Federal Regulation". (In a week or so, this will be moved to the Archives page.) Click on the title. Success will show a PDF icon and link to download the article. Failure will show a message that includes "Access to NBER Papers" in larger, brown text.
	SciELO	There are multiple SciELO entries way down the list. We need to determine if we need to maintain IP addresses with SciELO, since it's all OA to begin with. If we don't, and can remove all SciELO stanzas, we need to be sure that we're not proxying any SciELO URLs.

- IEEE.org got a "Success!" on the EZproxy Testing Sheet, but I'm not getting the same result.
- For CAS, most traffic is to SciFinder. I got the tokenized URL from the PURL server, and tried it with proxy.library.cornell.edu in front; that took me to the correct location. I tried it with cornell.idm.oclc.org, and got an "Unauthorized IP Address" message. The EZproxy Notifications spreadsheet indicates that Sally sent our new IP range to ACS, and got confirmation a week later. If it doesn't work, how can we trust that these things have been completed by the content providers?
 - I then logged in to the ACS site (the password still works, yay; it says "Welcome: Bill" in there), but couldn't access the IP address area because it requires 2-step authentication. Apologies to whomever received a text at 6:20am on Saturday. I hope it didn't wake you up.
 - I sent them an email on 4/6, asking that they confirm that the IP had been added
 - 5/21: I used the tokenized URL from the PURL server, attached to cornell.idm.oclc.org, and it DID take me to the login page, same as with proxy.library.cornell.edu, so perhaps it is now working. We'll want to confirm soon after the switch, though.
- Be sure to check Cap IQ, with a working username and password. They added our IP, and it appears to work, but does need a username /password test (5/21)
- CB Insights: test; it seems like it might be working, but may be having CSS problems.
- Crossref.org – do we need to update our IP address with them? I dunno.
- ZBMath, line 254: Click on the black cookie banner at the top of the page, to see the "Log In" or "Remote" dropdown, which will indicate Cornell access. But CSS failure(?) causes the page to not appear properly thru the IDM server. Not sure what causes this, but I can't confirm that access is set up. Note that Springer manages a lot of the services here, so they might have already added the new IP address – or maybe they only do sales, and not IP management. Don't know. (PMc, 4/15/20)
- Leadership Connect, line __: this one doesn't load properly at present, but they confirm that they have our new IP added. I have been in touch with a contact there; we believe that the problem is the lack of an SSL certificate. This will be one that needs to be checked right after the switch. Emails are in Project GROVER / Hosted EZproxy / Adding IPs Messages folder. (PMc, 4/16/20)

- cnki.net - this domain doesn't work, but oversea.cnki.net does actually work, and does recognize Cornell. So I think it is OK overall; i think there are just some funky domains in the stanza. I'm not sure. PMC, 4/16
- umich.edu domain - Most domains here don't need to be proxied, but more than one do.
 - I sent a note to the ICPSR help desk to ask them to add the new IP address, for www.icpsr.umich.edu.
 - I tested the various humanitiesebook.org/fulcrum.org/ACLS sites, and they are working.
 - hti.umich.edu has moved to deepblue.lib.umich.edu
 - I need to find a way to determine what, if anything, we subscribe to, from U Mich library. [This page](#) talks about limited access to online resources, and has a link to the databases that have controlled access (though I don't think it's correct, because many on that list say they are "open"), but there's no information about how one subscribes to them, or even information on how one accesses them.

Current Active Stanzas

This is output from the current Cornell EZproxy test configuration. It is an accurate representation of all of the stanzas in the active config file, but without all of the current traffic information. Accessing the actual page requires some authentication, but recording all of it here will work just as well, and just as easily.

Databases

In dex	Database	H os ts	Domains	URL
0	Books 24x7	0	DJ books24x7.com H library.books24x7.com:80	http://library.books24x7.com/library.asp?^B
1	InCites Benchmarking, InCites Journal and Highly Cited Data	8	DJ incites.thomsonreuters.com H incites.thomsonreuters.com:443	https://incites.thomsonreuters.com
2	New Yorker Digital Archive	20	DJ newyorker.com HJ newyorker.com:80 HJ www.newyorker.com:80 HJ archives.newyorker.com:80 HJ content.archives.newyorker.com:80 HJ www.newyorker.com:443 HJ archives.newyorker.com:443	https://archives.newyorker.com
3	Academic Medicine	0	D academicmedicine.org H www.academicmedicine.org:80	http://www.academicmedicine.org
4	Academy of Management	0	DJ aom.org HJ annals.aom.org:80 H journals.aom.org:443	https://journals.aom.org
5	ASCSESS DL	0	D sciencesocieties.org H dl.sciencesocieties.org:443	https://dl.sciencesocieties.org/
6	Acta Horticulturae	0	D actahort.org H www.actahort.org:80	www.actahort.org
7	Advances in magnetic shape memory materials	3	D scientific.net H www.scientific.net:80	http://www.scientific.net/MSF.684
8	Advances in Physiology Education	0	D ajpadvan.org H www.ajpadvan.org:80	http://www.ajpadvan.org
9	agricultural institute of canada	0	D pubs.aic.ca H pubs.aic.ca:80	http://pubs.aic.ca/
10	AIAA	0	D aiaa.org H www.aiaa.org:443	https://www.aiaa.org
11	AJTMH American Journal of Tropical Medicine and Hygiene	0	D ajtmh.org H www.ajtmh.org:80	http://www.ajtmh.org
12	american association of physics teachers	0	D aapt.org H aapt.org:80	http://aapt.org/
13	American Bee Journal	0	DJ bluetoad.com DJ americanbeejournal.com H www.mydigitalpublication.com:443 H bluetoad.com:443 H bluetoad.com:80 H www.americanbeejournal.com:443	https://www.mydigitalpublication.com/publication/logincheck.php
14	American Journal of Clinical Nutrition	0	D nutrition.org H ajcn.nutrition.org:80 H www.ajcn.org:80	http://www.ajcn.org
15	American journal of public health	3	D aphapublications.org H ajph.aphapublications.org:80	http://ajph.aphapublications.org/
16	American Physical Society	0	D aps.org H prola.aps.org:80	http://prola.aps.org
17	American Society for Microbiology	0	DJ asmscience.org DJ asm.org HJ www.journals.asm.org:80 HJ www.asmscience.org:80 HJ www.asm.org:80 HJ msystems.asm.org:80 HJ msphere.asm.org:80 HJ mira.asm.org:80 HJ mibr.asm.org:80 HJ mcb.asm.org:80 HJ mbio.asm.org:80 HJ jvi.asm.org:80 HJ journals.asm.org:80 HJ jcm.asm.org:80 HJ jb.asm.org:80 HJ intl-msystems.asm.org:80 HJ intl-msphere.asm.org:80 HJ intl-mcb.asm.org:80 HJ intl-mbio.asm.org:80 HJ intl-jvi.asm.org:80 HJ intl-journals.asm.org:80 HJ intl-jcm.asm.org:80 HJ intl-jb.asm.org:80 HJ intl-iai.asm.org:80 HJ intl-genomea.asm.org:80 HJ intl-ec.asm.org:80 HJ intl-cvi.asm.org:80 HJ intl-cmr.asm.org:80 HJ intl-aem.asm.org:80 HJ intl-aac.asm.org:80 HJ iai.asm.org:80 HJ genomea.asm.org:80 HJ ec.asm.org:80 HJ cvi.asm.org:80	https://www.asm.org/

			HJ cmr.asm.org:80 HJ cdli.asm.org:80 HJ asm.org:80 HJ aem.asm.org:80 HJ aac.asm.org:80 H www.asm.org:443	
18	American Veterinary Medical Association Journals	0	D avma.org H avmajournals.avma.org:80	http://avmajournals.avma.org/loi/ajvr
19	Anipedia	1	DJ anipedia.org H www.anipedia.org:443	https://www.anipedia.org
20	Annali della Scuola Normale Superiore di Pisa	0	D sns.it H annaliscienze.sns.it:80	http://annaliscienze.sns.it
21	Antiquity	0	D antiquity.ac.uk H antiquity.ac.uk:80	http://antiquity.ac.uk
22	Applied physics express	0	D jsap.jp H ttp:80	http://apex.jsap.jp
23	Applied Rheology	0	DJ appliedrheology.org DJ ethz.ch HJ complexfluids.ethz.ch:80 HJ ar.ethz.ch:80 H www.appliedrheology.org:80 H www.complexfluids.ethz.ch:80 H www.ar.ethz.ch:80	http://www.appliedrheology.org/
24	APS Journals	7	D apsnet.org H apsnet.org:80	http://apsjournals.apsnet.org
25	APSNet	0	D apsnet.org H www.apsnet.org:80	http://www.apsnet.org
26	Arboriculture & Urban Forestry	0	DJ isa-arbor.com H www.isa-arbor.com:80	http://www.isa-arbor.com/
27	Arcanum Digiheca	0	DJ arcanum.hu H adtplus.arcanum.hu:443	https://adtplus.arcanum.hu
28	Arctic anthropology	0	D aa.uwpress.org H aa.uwpress.org:80	http://aa.uwpress.org
29	art in print	0	D artinprint.org H artinprint.org:80	http://artinprint.org
30	ASABE technical library	0	D asabe.org H elibrary.asabe.org:80	http://elibrary.asabe.org
31	ASAE Technical Library	0	D asae.frymulti.com H asae.frymulti.com:80	http://asae.frymulti.com
32	ASBMB Today	0	D asbmb.org H www.asbmb.org:80	http://www.asbmb.org
33	ASCE	0	DJ ascelibrary.org DJ asce.org H ascelibrary.org:443	https://ascelibrary.org
34	ASME Digital Collection	0	DJ asmedigitalcollection.asme.org HJ www.asmedl.org:80 HJ www.asmedigitalcollection.asme.org:80 HJ www.asme.org:80 HJ vibrationacoustics.asmedigitalcollection.asme.org:80 HJ verification.asmedigitalcollection.asme.org:80 HJ turbomachinery.asmedigitalcollection.asme.org:80 HJ tribology.asmedigitalcollection.asme.org:80 HJ thermalscienceapplication.asmedigitalcollection.asme.org:80 HJ solarenergyengineering.asmedigitalcollection.asme.org:80 HJ risk.asmedigitalcollection.asme.org:80 HJ proceedings.asmedigitalcollection.asme.org:80 HJ pressurevesseltech.asmedigitalcollection.asme.org:80 HJ offshoremechanics.asmedigitalcollection.asme.org:80 HJ nuclearengineering.asmedigitalcollection.asme.org:80 HJ nondestructive.asmedigitalcollection.asme.org:80 HJ nanoengineeringmedical.asmedigitalcollection.asme.org:80 HJ micronanomanufacturing.asmedigitalcollection.asme.org:80 HJ medicaldiagnostics.asmedigitalcollection.asme.org:80 HJ medicaldevices.asmedigitalcollection.asme.org:80 HJ mechanismsrobotics.asmedigitalcollection.asme.org:80 HJ mechanicaldesign.asmedigitalcollection.asme.org:80 HJ materialstechnology.asmedigitalcollection.asme.org:80 HJ manufacturingscience.asmedigitalcollection.asme.org:80 HJ Journals.asmedigitalcollection.asme.org:80 HJ www.asme.org:443 HJ vibrationacoustics.asmedigitalcollection.asme.org:443 HJ verification.asmedigitalcollection.asme.org:443 HJ turbomachinery.asmedigitalcollection.asme.org:443 HJ tribology.asmedigitalcollection.asme.org:443 HJ thermalscienceapplication.asmedigitalcollection.asme.org:443	https://asmedigitalcollection.asme.org

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35	ASPET Journals Online	0	<p>D aspetjournals.org H www.aspetjournals.org:80</p>	http://www.aspetjournals.org
36	Association for Computing Machinery	1	<p>D acm.org H delivery.acm.org:80 H portal.acm.org:80 H www.acm.org:80</p>	http://portal.acm.org/portal.cfm
37	Biochemical Journal	0	<p>D biochemj.org H www.biochemj.org:80</p>	http://www.biochemj.org
38	Biochemical Society symposia	0	<p>D symposia.biochemistry.org H symposia.biochemistry.org:80</p>	http://symposia.biochemistry.org
39	Biochemical Society Transactions	0	<p>D biochemsoctrans.org H www.biochemsoctrans.org:80</p>	http://www.biochemsoctrans.org/bst/toc.htm
40	Biological Bulletin	0	<p>D biolbull.org H www.biolbull.org:80</p>	http://www.biolbull.org
41	Biology of Reproduction	0	<p>D biolreprod.org H www.biolreprod.org:80</p>	http://www.biolreprod.org
42	Biology of the Cell	0	<p>D biolcell.org H www.biolcell.org:80</p>	http://www.biolcell.org
43	blood	0	<p>D hematology.org D bloodjournal.org</p>	http://bloodjournal.hematologylibrary.org/

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44	BMJ.com	20	DJ bmj.com HJ heart.bmj.com:80 H www.bmj.com:80	http://www.bmj.com/archive/
45	Bone and Joint Journal (UK)	0	DJ jbjs.org.uk DJ boneandjoint.org.uk HJ www.jbjs.org.uk:80 HJ www.boneandjoint.org.uk:80 HJ www.bjr.boneandjoint.org.uk:80 HJ www.bjprocs.boneandjoint.org.uk:80 HJ www.bj360.boneandjoint.org.uk:80 HJ web.jbjs.org.uk:80 HJ ps.boneandjoint.org.uk:80 HJ online.boneandjoint.org.uk:443 HJ online.boneandjoint.org.uk:80 HJ jbjs.org:443 HJ jbjs.org.uk:80 HJ boneandjoint.org.uk:80 HJ bjr.boneandjoint.org.uk:80 HJ bjprocs.boneandjoint.org.uk:80 HJ bji.boneandjoint.org.uk:80 HJ bj360.boneandjoint.org.uk:80 HJ www.bji.boneandjoint.org.uk:80	http://www.bji.boneandjoint.org.uk/
46	Botanical society of America	0	D amjbot.org D botany.org H www.amjbot.org:80	http://www.amjbot.org
47	British Online Archives	0	DJ britishonlinearchives.co.uk HJ connect.liblynx.com:80 H brow.britishonlinearchives.co.uk:80	http://brow.britishonlinearchives.co.uk/
48	Bulletin of the Seismological Society of America	0	D bssaonline.org H www.bssaonline.org:80	http://www.bssaonline.org
49	bureau of national affairs	0	D bnai.com D bna.com H bnalaborplus.bna.com:80 H essential.bna.com:80 H www.bnai.com:80 H webwatch.bna.com:80 H taxandaccounting.bna.com:80 H pubs.bna.com:80 H news.bna.com:80 H medialaw.bna.com:80 H lawyersmanual.bna.com:80 H laborandemploymentlaw-old.bna.com:80 H laborandemploymentlaw.bna.com:80 H iplaw.bna.com:80 H healthlaw.bna.com:80 H exportguide.bna.com:80 H esweb.bna.com:80 H corplaw.bna.com:80 H corpgov.bna.com:80 H corpcompliance.bna.com:80 H benefits.bna.com:80 H www.bna.com:80	http://www.bna.com
50	CAA.reviews	0	D caareviews.org H www.caareviews.org:80	www.caareviews.org
51	Cambridge Journals	0	D oupjournals.org H cje.oupjournals.org:80	http://cje.oupjournals.org
52	Canadian applied mathematics quarterly	0	D ualberta.ca H www.math.ualberta.ca:80	www.math.ualberta.ca
53	Canadian Archaeological Association	0	D canadianarchaeology.com H canadianarchaeology.com:80	http://canadianarchaeology.com
54	Canadian Mathematical Society	0	DJ math.ca H mr.math.ca:443 H cms.math.ca:443	https://mr.math.ca
55	Canadian Mineralogist	0	D canmin.org H www.canmin.org:80	www.canmin.org
56	Caribbean Naturalist	0	DJ eaglehill.us H www.eaglehill.us:443	https://www.eaglehill.us
57	Casalini Resources	0	D torossa.com D casalini.it H www.torossa.com:80 H www.digital.casalini.it:80	www.digital.casalini.it
58	Casino City's Global Gaming Almanac	0	DJ globalgamingalmanac.com H www.globalgamingalmanac.com:80 H www.globalgamingalmanac.com:443	http://www.globalgamingalmanac.com
59	Casino City's North American Gaming Almanac	0	DJ northamericangamingalmanac.com H www.northamericangamingalmanac.com:80 H www.northamericangamingalmanac.com:443	http://www.northamericangamingalmanac.com/
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61	Chadwyck-Healey Resources	0	D chadwyck.com H ipaft.chadwyck.com:80 H historymakers.chadwyck.com:80 H parlipapers.chadwyck.com:80 H teso.chadwyck.com:80 H schiller.chadwyck.com:80 H luther.chadwyck.com:80 H www.chadwyck.com:80 H archives.chadwyck.com:80	http://lipaft.chadwyck.com/public?XXrequest=/home.cgi

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62	Chinese Periodical Full-text Database	0	DJ cnbksy.cn H www.cnbksy.cn:80	http://www.cnbksy.cn
63	Choice Reviews	0	D choicereviews.org H www.choicereviews.org:80	http://www.choicereviews.org
64	Clinical Chemistry	0	DJ aaccjnls.org H clinchem.aaccjnls.org:80	http://clinchem.aaccjnls.org
65	Clinical Science	0	D clinsci.org H www.clinsci.org:80	www.clinsci.org/cs/toc.htm
66	Cold Spring Harbor Lab Press	0	D cshlp.org H majournal.cshlp.org:80	http://majournal.cshlp.org
67	Collection of Czechoslovak Chemical Communications	0	D cccc.uochb.cas.cz H cccc.uochb.cas.cz:80	http://cccc.uochb.cas.cz
68	Columbia International Affairs Online	0	D cionet.org H www.cionet.org:80	http://www.cionet.org
69	Commentationes mathematicae=Prace matematyczne	0	D ptm.org.pl H cm.ptm.org.pl:80	http://cm.ptm.org.pl/
70	Corpus of Contemporary American English	0	HJ corpus.byu.edu:80 H corpus.byu.edu:443	https://corpus.byu.edu
71	CSH Press	0	D cshlp.org H genome.cshlp.org:80 H genesdev.cshlp.org:80	genome.cshlp.org
72	DETAIL Inspiration	0	DJ detail-online.com DJ detail.de HJ www.inspiration.detail.de:80 H detail-online.com:80	http://detail-online.com
73	Developmental Cell Online	0	D developmentalcell.com H www.developmentalcell.com:80	http://www.developmentalcell.com
74	Diabetes	0	D diabetesjournals.org H diabetes.diabetesjournals.org:80	http://diabetes.diabetesjournals.org
75	Dissertations of China	0	D wanfangdata.com H www.wanfangdata.com:80	http://www.wanfangdata.com/
76	EcoTextile News	0	DJ ecotextile.com H www.ecotextile.com:443	https://www.ecotextile.com/
77	Electrochemical Society, Inc.	0	D electrochem.org H www.electrochem.org:80	http://www.electrochem.org
78	Encyclopedia of Life Support Systems	0	DJ eolss.net H www.eolss.net:80	http://www.eolss.net
79	ESA Journals Online	0	D esajournals.org H www.esajournals.org:80	http://www.esajournals.org
80	ESA Publications Office	0	D esapubs.org H www.esapubs.org:80	http://www.esapubs.org
81	eStatement studies	0	DJ rmau.org H rmau.org:443	https://rmau.org
82	Evolutionary Ecology Research	0	D evolutionary-ecology.com H www.evolutionary-ecology.com:80	http://www.evolutionary-ecology.com
83	FASEB Journals	0	D fasebj.org H www.fasebj.org:80	http://www.fasebj.org
84	FDI Markets	0	DJ fdimarkets.com H app.fdimarkets.com:443	https://app.fdimarkets.com
85	FiI Online	0	D fiionline.com H www.fiionline.com:443	https://www.fiionline.com/
86	Financial Times	0	D ft.com H registration.ft.com:443	https://registration.ft.com/corporate/signup/Oaq41Sl2OoGmS
87	Fire Insurance Maps Online	0	DJ historicalinfo.com H firms.historicalinfo.com:443	https://firms.historicalinfo.com
88	florida international university	0	D fiu.edu H digitalcommons.fiu.edu:80	http://digitalcommons.fiu.edu
89	FSU School of Criminology and Criminal Justice	0	D fsu.edu H www.criminology.fsu.edu:80	http://www.criminology.fsu.edu
90	Genetics Online	0	D genetics.org H www.genetics.org:80	http://www.genetics.org
91	GIDEON Online Trial	0	D gideononline.com HJ www.gideononline.com:80 HJ web.gideononline.com:80 H web.gideononline.com:443	https://web.gideononline.com
92	grant forward	0	D grantforward.com H grantforward.com:80	http://grantforward.com/
93	guilford journals	0	D guilfordjournals.com H guilfordjournals.com:443	https://guilfordjournals.com
94	Health Affairs	0	D healthaffairs.org H www.healthaffairs.org:80	http://www.healthaffairs.org
95	Health services management research	0	D hsmr.rsmjournals.com H www.hsmr.rsmjournals.com:80	www.hsmr.rsmjournals.com
96	Ilahiyat	0	DJ ilahiyatstudies.org H ilahiyatstudies.org:80	http://ilahiyatstudies.org/
97	in practice	0	DJ bmj.com H inpractice.bmj.com:80	http://inpractice.bmj.com/
98	Inderscience Publishers	0	D inderscience.com H www.inderscience.com:80	http://www.inderscience.com

99	Informit	0	D informit.com.au H search.informit.com.au :443	https://search.informit.com.au
100	Ingenta	0	D ingenta.com H www.ingenta.com :80	http://www.ingenta.com
101	Ingenta Select	0	D ingentaselect.com H www.ingentaselect.com :80	http://www.ingentaselect.com
102	Wolters Kluwer Cheetah	0	DJ wolterskluwer.com DJ cch.com DJ wkcheetah.com HJ login.wolterskluwer.com :443 HJ login.intelliconnect.cch.com :443 HJ wkcheetah.com :443 H wkcheetah.com :80	http://wkcheetah.com
103	International Bee Research Association	0	D ibrabee.org.uk H www.ibrabee.org.uk :80	http://www.ibrabee.org.uk/
104	International Union of Crystallography	0	DJ iucr.org H journals.iucr.org :443	https://journals.iucr.org
105	Investigative Ophthalmology & Visual Science	0	D iovs.org H www.iovs.org :80	http://www.iovs.org
106	Islamic Finance News	0	DJ islamicfinancenews.com H www.islamicfinancenews.com :443	https://www.islamicfinancenews.com/
107	IWA Publishing Online Journals	0	D iwaponline.com H www.iwaponline.com :80	http://www.iwaponline.com
108	Japanese Journal of Applied Physics	0	D jjap.jp H jjap.jp :80	http://jjap.jp
109	JNCI cancer spectrum	0	D oupjournals.org H jncicancerspectrum.oupjournals.org :80	jncicancerspectrum.oupjournals.org
110	Journal of Animal Science	0	D journalofanimalscience.org H journalofanimalscience.org :80	http://journalofanimalscience.org
111	Journal of Animal Science	0	D jas.fass.org H jas.fass.org :80	http://jas.fass.org
112	Journal of apicultural research & bee world	0	D ibrabee.org.uk D ibra.org.uk H www.ibrabee.org.uk :80 H www.ibra.org.uk :80	http://www.ibrabee.org.uk
113	Journal of Biological Chemistry	0	D jbc.org H www.jbc.org :80	http://www.jbc.org
114	Journal of Bone and Joint Surgery (US)	0	D ejbjs.org H www.ejbs.org :80	http://www.ejbs.org
115	journal of bone and joint surgery (US) 2012	0	D jbjs.org H www.jbjs.org :80	http://www.jbjs.org/
116	Journal of cell biology	0	D rupress.org H jcb.rupress.org :80	http://jcb.rupress.org
117	Journal of Cell Biology	0	D jcb.org H www.jcb.org :80	http://www.jcb.org
118	Journal of general physiology	0	D rupress.org H jgp.rupress.org :80	http://jgp.rupress.org
119	Journal of General Physiology	0	D jgp.org H www.jgp.org :80	http://www.jgp.org
120	journal of herpetological medicine and surgery	0	D jherpmedsurg.com H jherpmedsurg.com :80	http://jherpmedsurg.com
121	journal of human resources	0	D uwpress.org H jhr.uwpress.org :80	http://jhr.uwpress.org
122	Journal of Leukocyte Biology	0	D jleukbio.org H www.jleukbio.org :80	http://www.jleukbio.org
123	Journal of Lipid Research	0	D jlr.org H www.jlr.org :80	http://www.jlr.org
124	Journal of Liposome Research	0	D dekker.com H www.dekker.com :80	http://www.dekker.com
125	Journal of Physics	0	D iop.org H stacks.iop.org :80 H stacks.iop.org :80	http://stacks.iop.org
126	Journal of the American Animal Hospital Association	0	DJ jaaha.org H jaaha.org :80 H pinnacle-secure.allenpress.com :443 H www.jaaha.org :80	http://jaaha.org
127	journal of the electrochemical society	0	D ecsd.org H ecsd.org :80	http://ecsd.org/dbt/dbt.jsp?KEY=JESOAN
128	Journal of the Indian Mathematical Society	0	DJ i-scholar.in H www.i-scholar.in :80	http://www.i-scholar.in
129	Journal of the Physical Society of Japan	0	D jps.jp H journals.jps.jp :80	http://journals.jps.jp
130	Journal of Trading	0	D ijournals.com H www.ijournals.com :80	http://www.ijournals.com/JOT/
131	Juris Arbitration Law	0	DJ arbitrationlaw.com H arbitrationlaw.com :443	https://arbitrationlaw.com
132	KISS	0	D kstudy.com H kiss.kstudy.com :80	http://kiss.kstudy.com
133	Labor and Employment Relations Association (LERA)	0	DJ lerachapters.org DJ leraweb.org H lerachapters.org :80	http://lerachapters.org/OJS/ojs-2.4.4-1/index.php/PFL/index
134	Land economics	0	D uwpress.org H le.uwpress.org :80	http://le.uwpress.org
135	Landscape journal	0	D uwpress.org H lj.uwpress.org :80	http://lj.uwpress.org
136	Lucius & Lucius Zeitschriften	0	D msh.de	http://dp-brocom.msh.de/digiPaper/servlet/authenticateformservlet?ID_10000907=true

		H dp-brocom.msh.de:80	
137 Magnes Press	2	DJ magnes-press.com H www.magnes-press.com:443	https://www.magnes-press.com/MyEBooks.aspx
138 Malaysiakini	0	DJ malaysiakini.com H www.malaysiakini.com:443	https://www.malaysiakini.com
139 Mercury magazine	0	D astrosociety.org H www.astrosociety.org:80	www.astrosociety.org
140 Microprocessor Reports	0	DJ linleygroup.com H linleygroup.com:443	https://linleygroup.com
141 Molecular and Cellular Proteomics	0	D mcponline.org H www.mcponline.org:80	http://www.mcponline.org
142 Molecular Biology of the Cell	0	D molbiolcell.org H www.molbiolcell.org:80	http://www.molbiolcell.org
143 Mycologia	0	D mycologia.org H www.mycologia.org:80	http://www.mycologia.org/
144 nrc press 2	0	D nrc-cnrc.gc.ca H pubs.nrc-cnrc.gc.ca:80	http://pubs.nrc-cnrc.gc.ca
145 Pediatric Research	0	D pedresearch.org H www.pedresearch.org:80	http://www.pedresearch.org
146 Pediatrics	0	D pediatrics.org D aapublications.org D pediatrics.aapublications.org H pediatrics.aapublications.org:80 H www.pediatrics.org:80	http://pediatrics.aapublications.org
147 PERIND	0	DJ informit.org H search.informit.org:443	https://search.informit.org/
148 Physics World	0	D iop.org H physicsworldarchive.iop.org:80	http://physicsworldarchive.iop.org
149 Protein Science	0	D proteinscience.org H www.proteinscience.org:80	http://www.proteinscience.org
150 Publications of the Astronomical Society of Japan	0	D pasj.asj.or.jp H pasj.asj.or.jp:80	http://pasj.asj.or.jp
151 Radiology	0	D rsna.org H radiology.rsna.org:80	http://radiology.rsna.org
152 rbm from acrl	0	D acrl.org H rbm.acrl.org:80	http://rbm.acrl.org/
153 RIT Press	0	D rit.edu H www.rit.edu:80	http://www.rit.edu
154 Rivista di Matematica della Università di Parma	0	D unipr.it H rivista.math.unipr.it:80	http://rivista.math.unipr.it/
155 Royal Society of Chemistry Publishing	0	DJ rsc.org HJ pubs.rsc.org:443 H pubs.rsc.org:80	http://pubs.rsc.org
156 S and P Global Capital IQ	0	DJ sso.spglobal.com DJ sso.mhfi.com DJ capitaliq.com HJ capitaliq.com:80 HJ capitaliq.com:443 HJ www.capitaliq.com:80 HJ www.capitaliq.com:443	https://www.capitaliq.com
157 shen bao or shun pao	0	D egreenapple.com H shunpao.egreenapple.com:80	http://shunpao.egreenapple.com/
158 Slavic Humanities Index	0	D slavus.ca H slavus.ca:80	http://slavus.ca
159 Societe Mathematique de France	0	D emath.fr H smf.emath.fr:80	http://smf.emath.fr/en/Publications/
160 The Institute of Physics	0	D iop.org H www.iop.org:80	http://www.iop.org
161 The Journal of Experimental Medicine	0	D jem.org H www.jem.org:80	http://www.jem.org
162 The Journal of Neuroscience Online	0	D jneurosci.org H www.jneurosci.org:80	http://www.jneurosci.org
163 Turpion	0	D turpion.com D turpion.org H www.turpion.org:80 H www.turpion.com:80	http://www.turpion.org
164 university of michigan digital library	0	D umich.edu H quod.lib.umich.edu:80	http://quod.lib.umich.edu
165 University of Michigan Publications	0	D umich.edu H hdl.lib.umich.edu:80 H hdl.handle.net:80 H www.hti.umich.edu:80 H ets.umdl.umich.edu:80 H www.umdl.umich.edu:80 H www.icpsr.umich.edu:80 H bmc.lib.umich.edu:80	http://www.umdl.umich.edu
166 UpToDate.com	0	DJ uptodateonline.com DJ uptodate.com HJ www.utdol.com:80 HJ utdol.com:80 HJ www.uptodateonline.com:80 HJ uptodateonline.com:80 HJ uptodate.com:80 HJ www.uptodateonline.com:443 HJ www.uptodate.com:443 H www.uptodate.com:80	http://www.uptodate.com
167 veterinary record	0	DJ bmj.com HJ veterinaryrecord.bmj.com:80	http://veterinaryrecord.bmj.com/
168 webscd	0	D www.cdc.cam.ac.uk H www.cdc.cam.ac.uk:443	https://www.cdc.cam.ac.uk

169	West Academic Study Aids	0	DJ westacademic.com H images.westacademic.com:80 H images.westacademic.com:443 H media.westacademic.com:80 H media.westacademic.com:443 H signin.westacademic.com:80 H signin.westacademic.com:443 H subscription.westacademic.com:80 H subscription.westacademic.com:443	https://subscription.westacademic.com
170	Wolters Kluwer Study Aids	0	DJ aspenlaw.com HJ d3t0z66hbmymka.cloudfront.net:80 HJ d3t0z66hbmymka.cloudfront.net:443 HJ ebooks.aspenlaw.com:80 H ebooks.aspenlaw.com:443	https://ebooks.aspenlaw.com/
171	Woodhead ebooks	0	D woodheadpublishingonline.com H www.woodheadpublishingonline.com:80	http://www.woodheadpublishingonline.com
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174	Digital Theatre Plus	0	DJ digitaltheatreplus.com H www.digitaltheatreplus.com:443	https://www.digitaltheatreplus.com
175	Project Muse	0	D muse.uq.edu.au D muse.jhu.edu H muse.uq.edu.au:80 H muse.jhu.edu:80	http://muse.uq.edu.au
176	Siku Quanshu	1	DJ 130.132.21.82 DJ yale.edu DJ library.yale.edu H library.yale.edu:80	http://library.yale.edu
177	19th Century Masterfile	0	DJ firststop.net H ncm.firststop.net:80	http://ncm.firststop.net
178	247 Reference	0	D 247ref.org H www.247ref.org:80	http://www.247ref.org
179	A and A ePortal	0	DJ aaeportal.com H www.aaeportal.com:443	https://www.aaeportal.com/
180	AAAA Digital Concert Hall	3	D cloudfront.net DJ digitalconcerthall.com DJ Berliner-philharmoniker.de HJ www.berliner-philharmoniker.de:80 H www.digitalconcerthall.com:80	http://www.digitalconcerthall.com
181	JSTOR	0	DJ jstor.org HJ uk.jstor.org:80 HJ plants.jstor.org:80 HJ about.jstor.org:80 HJ mobile.jstor.org:80 HJ links.jstor.org:80 HJ jstor.org:80 HJ www.jstor.org:443 HJ www.jstor.org:80	http://www.jstor.org/
182	Magnes Press	0	DJ magnes-press.com H www.magnes-press.com:443	https://www.magnes-press.com/MyEBooks.aspx
183	AAAA MHFI	0	DJ mhfi.com HJ sso.mhfi.com:443	https://sso.mhfi.com
184	AAAA Newsbank/Readex Databases AB test	0	HJ products.newsbank.com:80 HJ opac.newsbank.com:80 HJ docs.newsbank.com:80 DJ newsbank.com H infoweb.newsbank.com:80	http://infoweb.newsbank.com
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187	New Yorker Digital Archive	0	D content.archives.newyorker.com DJ archives.newyorker.com DJ www.newyorker.com DJ newyorker.com H www.newyorker.com:80 H archives.newyorker.com:80	http://www.newyorker.com/archives
188	ProQuest	0	DJ proquestk12.com HJ www.proquestk12.com:80 DJ medicalevidencematters.com HJ prq.st:80 HJ trials.proquest.com:443 HJ trials.proquest.com:80 HJ statistical.proquest.com:80 HJ statabs.proquest.com:80 HJ digitalmicrofilm.proquest.com:80 HJ pqrc.proquest.com:80 HJ literature.proquest.com:80 HJ gateway.proquest.com:80 HJ fedsearch.proquest.com:80 HJ congressional.proquest.com:80 DJ media.proquest.com DJ m.search.proquest.com DJ conquestsystems.com DJ conquest-leg-insight.com DJ umi.com HJ sanborn.umi.com:80 HJ proquest.umi.com:80 DJ proquest.com	
189	AAAAScientific Style and Format Online, 8th Edition	1	DJ login.scientificstyleandformat.org DJ www.scientificstyleandformat.org HJ www.scientificstyleandformat.org:80	http://www.scientificstyleandformat.org/
190	Swank Digital Campus	0	D swankmp.net H digitalcampus.swankmp.net:80	http://digitalcampus.swankmp.net/
191	AAAS science and technology policy yearbook	0	D aaas.org H www.aaas.org:80	www.aaas.org
192	AACR Journals Online	0	D aacrjournals.org H www.aacrjournals.org:80	http://www.aacrjournals.org
193	AACR meeting abstracts	0	D aacrmeetingabstracts.org H aacrmeetingabstracts.org:80	http://aacrmeetingabstracts.org/
194	Fulcrum (updated 20180731)	0	DJ fulcrum.org HJ fulcrum.org:443 HJ fulcrum.org:80 HJ www.fulcrum.org:80 HJ hdi.handle.net:443 HJ hdi.handle.net:80 HJ www.fulcrum.org:443	https://www.fulcrum.org
195	Aal methods and recommended practices of the AOCS	0	D aocs.org H www.aocs.org:80	www.aocs.org
196	AAPG Datapages	0	D datapages.com H archives.datapages.com:80	archives.datapages.com
197	Abbreviations online	0	D ruhr-uni-bochum.de H www.ruhr-uni-bochum.de:80	http://www.ruhr-uni-bochum.de/philosophy/projects/abbreviations/servers.html
198	ABC-CLIO	0	DJ abc-clio.com H www.abc-clio.com:80	http://www.abc-clio.com
199	ABMS directory	0	D abmsdirectory.com H abmsdirectory.com:80	http://abmsdirectory.com
200	Absinthe Literary Review 2003	0	D absinthe-literary-review.com H absinthe-literary-review.com:80	http://absinthe-literary-review.com
201	Academic charts online	0	D academiccharts.com H ipm.academiccharts.com:80	http://ipm.academiccharts.com
202	Academic Press	0	D academicpress.com D apnet.com H www.apnet.com:80 H www.academicpress.com:80	http://www.apnet.com
203	Academic Studies Press Journals	0	DJ academicstudiespress.com H journals.academicstudiespress.com:80	http://journals.academicstudiespress.com
204	access engineering	0	D books.mcgraw-hill.com D accessengineeringlibrary.com H www.accessengineeringlibrary.com:80	http://www.accessengineeringlibrary.com
205	Access Newspaper Archive	0	D access.newspaperarchive.com H access.newspaperarchive.com:80	http://access.newspaperarchive.com/
206	Access Science	0	DJ accessscience.com HJ accessscience.com:80 HJ www.accessscience.com:80 H www.accessscience.com:443	https://www.accessscience.com
207	Access: the supplementary index to periodicals	0	D magazineresearchcenter.com H www.magazineresearchcenter.com:80	www.magazineresearchcenter.com
208	Accessible Archives	0	D accessible.com	http://www.accessible.com/accessible/

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209	ACLS Humanities E-Book (valid until 20181001)	0 DJ umich.edu DJ humanitiesebook.org DJ handle.net HJ www.hti.umich.edu :80 HJ quod.lib.umich.edu :80 HJ name.umdl.umich.edu :80 HJ humanitiesebook.org :80 HJ www.humanitiesebook.org :443 HJ www.hti.umich.edu :443 HJ quod.lib.umich.edu :443 HJ name.umdl.umich.edu :443 HJ humanitiesebook.org :443 HJ hdl.lib.umich.edu :443 HJ hdl.handle.net :443 HJ ets.umdl.umich.edu :443 HJ hdl.lib.umich.edu :80 HJ hdl.handle.net :80 HJ ets.umdl.umich.edu :80 HJ www.humanitiesebook.org :80	http://www.humanitiesebook.org/
210	acoustical society of america	0 D asadl.org H asadl.org :80	http://asadl.org/
211	ACS publications	0 D acs.org H pubs.acs.org :80 H cen.acs.org :80	http://pubs.acs.org
212	ACSM Bulletin	0 D webmazine.org H www.webmazine.org :80	http://www.webmazine.org/acsbulletin.shtml
213	Acta botánica venezuénica	0 D scielo.org.ve H www.scielo.org.ve :80	www.scielo.org.ve
214	Ad age international	0 D adage.com H www.adage.com :80	www.adage.com
215	Adam Matthew Digital (updated 20181105)	2 DJ amdigital.co.uk HJ empire.amdigital.co.uk :80 HJ www.empire.amdigital.co.uk :443 HJ racerelations.amdigital.co.uk :80 HJ www.racerelations.amdigital.co.uk :443 HJ socialismonfilm.amdigital.co.uk :80 HJ www.socialismonfilm.amdigital.co.uk :80 HJ www.socialismonfilm.amdigital.co.uk :443 HJ www.frontierlife.amdigital.co.uk :443 HJ www.frontierlife.amdigital.co.uk :80 HJ tiles.am-analytics.co.uk :80 HJ www.worldsfairs.amdigital.co.uk :80 HJ www.virginiacompanyarchives.amdigital.co.uk :80 HJ www.victorianpopularculture.amdigital.co.uk :80 HJ www.travelwriting.amdigital.co.uk :80 HJ www.slavery.amdigital.co.uk :80 HJ www.shakespeareinperformance.amdigital.co.uk :80 HJ www.romanticism.amdigital.co.uk :80 HJ www.rockandroll.amdigital.co.uk :80 HJ www.researchsource.amdigital.co.uk :80 HJ www.racerelations.amdigital.co.uk :80 HJ www.popularmedicine.amdigital.co.uk :80 HJ www.perditamanuscripts.amdigital.co.uk :80 HJ www.migration.amdigital.co.uk :80 HJ www.medievaltravel.amdigital.co.uk :80 HJ www.medievalfamilylife.amdigital.co.uk :80 HJ www.medicalservicesandwarfare.amdigital.co.uk :80 HJ www.masstourism.amdigital.co.uk :80 HJ www.massobservation.amdigital.co.uk :80 HJ www.marketresearch.amdigital.co.uk :80 HJ www.londonlowlife.amdigital.co.uk :80 HJ www.literaryprintculture.amdigital.co.uk :80 HJ www.literarymanuscriptsleeds.amdigital.co.uk :80 HJ www.literarymanuscriptsberg.amdigital.co.uk :80 HJ www.jwtadvertisingamerica.amdigital.co.uk :80 HJ www.jewishlife.amdigital.co.uk :80 HJ www.indiaraj.amdigital.co.uk :80 HJ www.grandtour.amdigital.co.uk :80 HJ www.globalcommodities.amdigital.co.uk :80 HJ www.gender.amdigital.co.uk :80 HJ www.firstworldwar.amdigital.co.uk :80 HJ www.everydaylife.amdigital.co.uk :80 HJ www.eastindiacompany.amdigital.co.uk :80 HJ www.empire.amdigital.co.uk :80 HJ www.eighteenthcenturydrama.amdigital.co.uk :80 HJ www.consumerculture.amdigital.co.uk :80 HJ www.colonialamerica.amdigital.co.uk :80	https://www.login.amdigital.co.uk

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216 Adam Matthew Digital: China, America and the Pacific	0	<p>DJ amdigital.co.uk HJ resources.amdigital.co.uk:80 HJ www.login.amdigital.co.uk:80 HJ www.login.amdigital.co.uk:443 H www.cap.amdigital.co.uk:80</p>	http://www.cap.amdigital.co.uk/
217 Adam Matthew Publications pre-2014April	0	<p>D secure.amdigital.co.uk D amdigital.co.uk H www.archiveexplorer.amdigital.co.uk:80 H firstworldwar.amdigital.co.uk:80 H www.everydaylife.amdigital.co.uk:80 H www.victorianpopularculture.amdigital.co.uk:80 H www.travelwriting.amdigital.co.uk:80 H www.rockandroll.amdigital.co.uk:80 H www.18thcjournals.amdigital.co.uk:80 H globalcommodities.amdigital.co.uk:80 H www.romanticism.amdigital.co.uk:80 H www.aap.amdigital.co.uk:80 H www.archivesdirect.amdigital.co.uk:80 H www.empire.amdigital.co.uk:80 H www.indiaraj.amdigital.co.uk:80 H www.cap.amdigital.co.uk:80 H www.china.amdigital.co.uk:80</p>	http://www.archiveexplorer.amdigital.co.uk
218 AdSpender	0	<p>DJ kantarmediana.com HJ adspender.kantarmediana.com:80 H edu.adspender.kantarmediana.com:80</p>	http://edu.adspender.kantarmediana.com
219 advanced research journals	0	<p>D arjournals.org H www.arjournals.org:80</p>	www.arjournals.org
220 Aeronautical Journal	0	<p>D raes.org.uk H www.raes.org.uk:80</p>	www.raes.org.uk
221 Africa Confidential	0	<p>D africa-confidential.com H www.africa-confidential.com:80</p>	www.africa-confidential.com/news-by-issue
222 Africa knowledge project	0	<p>DJ africaknowledgeproject.org H www.africaknowledgeproject.org:80</p>	http://www.africaknowledgeproject.org/
223 AGIWEB	0	<p>D agiweb.org H www.agiweb.org:80</p>	www.agiweb.org/
224 Agrarwirtschaft	0	<p>D gjae-online.de H www.gjae-online.de:80</p>	www.gjae-online.de
225 Agronomy for sustainable development	0	<p>D agronomy-journal.org H www.agronomy-journal.org:80</p>	www.agronomy-journal.org
226 AGU Publications	0	<p>D agu.org H www.agu.org:80</p>	http://www.agu.org/journals/
227 AHA Journals (Lippincott Williams & Wilkins-LWW) (updated 20190820)	1	<p>DJ smajournalonline.com DJ psychosomaticmedicine.org DJ newslettersonline.com DJ nephrologytimes.com DJ jvir.org DJ anesthesia-analgesia.org DJ ovid.com DJ lww.com DJ neurology.org DJ ahajournals.org H ahajournals.org:80 H www.ahajournals.org:80 H ahajournals.org:443 H www.smajournalonline.com:80 H www.psychosomaticmedicine.org:80 H www.ovid.com:80 H www.newslettersonline.com:80 H www.neurology.org:80 H www.nephrologytimes.com:80 H www.jvir.org:80 H www.anesthesia-analgesia.org:80 H stroke.ahajournals.org:80 H ovidsp.ovid.com:80 H procedures.lww.com:80 H journals.lww.com:80 H jaha.ahajournals.org:80 H hyper.ahajournals.org:80 H procedures.lww.com:443 H journals.lww.com:443 H cp.neurology.org:80 H circres.ahajournals.org:80 H circimaging.ahajournals.org:80</p>	https://www.ahajournals.org/

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228	AIChE	0	D aiche.org H www.aiche.org:80	http://www.aiche.org/
229	AJNR	0	D ajnr.org H www.ajnr.org:80	www.ajnr.org
230	AJP Cell Physiology	0	D ajpcell.org H www.ajpcell.org:80	http://www.ajpcell.org
231	AJP Endocrinology and Metabolism	0	D ajpendo.org H www.ajpendo.org:80	http://www.ajpendo.org
232	AJP Gastrointestinal and Liver Physiology	0	D ajpgi.org H www.ajpgi.org:80	http://www.ajpgi.org
233	AJP Heart and Circulatory Physiology	0	D ajpheart.org H www.ajpheart.org:80	http://www.ajpheart.org
234	AJP Lung Cellular and Molecular Physiology	0	D ajplung.org H www.ajplung.org:80	http://www.ajplung.org
235	AJP Regulatory, Integrative and Comparative Physiology	0	D ajpregu.org H www.ajpregu.org:80	http://www.ajpregu.org
236	AJP Renal Physiology	0	D ajprenal.org H www.ajprenal.org:80	http://www.ajprenal.org
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238	Alacra	0	DJ alacra.com H secure.alacra.com:80	http://secure.alacra.com
239	Alberti Magni Opera Omnia	0	DJ albertus-magnus-online.de H www.albertus-magnus-online.de:443	https://www.albertus-magnus-online.de
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241	American Song	0	H amso.alexanderstreet.com:80	http://amso.alexanderstreet.com
242	Art and Architecture Video	0	H artv.alexanderstreet.com:80	http://artv.alexanderstreet.com
243	classical music library	0	H clmu.alexanderstreet.com:80	http://clmu.alexanderstreet.com
244	contemporary world music	0	H womu.alexanderstreet.com:80	http://womu.alexanderstreet.com
245	Digital library of classic Protestant texts	0	H solomon.tcpt.alexanderstreet.com:80	http://solomon.tcpt.alexanderstreet.com/
246	Early Encounters in North America	0	H eena.alexanderstreet.com:80	http://eena.alexanderstreet.com
247	Ethnographic Video and Anthropology Online	0	H anth.alexanderstreet.com:80	anth.alexanderstreet.com
248	Garland encyclopedia of world music online	0	H glnd.alexanderstreet.com:80	http://glnd.alexanderstreet.com
249	Irish women poets of the romantic period	0	H asp6new.alexanderstreet.com:80	http://asp6new.alexanderstreet.com/iwrp/iwrp.browse.all.aspx
250	March of Time	0	H moto.alexanderstreet.com:80	http://moto.alexanderstreet.com
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258	Alexander Street Press (new)	0	DJ search.alexanderstreet.com DJ alexanderstreet.com H search.alexanderstreet.com:443 H search.alexanderstreet.com:80	http://search.alexanderstreet.com
259	Algorithmic Botany	0	D www.algorithmicbotany.org H www.algorithmicbotany.org:80	http://www.algorithmicbotany.org/
260	Allergy, Asthma & Clinical Immunology	0	D aacijournal.com H www.aacijournal.com:80	www.aacijournal.com
261	AMA Association Journals	0	D ama-assn.org H pubs.ama-assn.org:80 H www.ama-assn.org:80 H extapps.ama-assn.org:80 H archsurg.ama-assn.org:80 H archpedi.ama-assn.org:80 H archtol.ama-assn.org:80 H archopht.ama-assn.org:80 H archneur.ama-assn.org:80	http://www.ama-assn.org

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262	American Association on Intellectual and Developmental Disabilities	0	D aaidjournals.org H www.aaidjournals.org:80	http://www.aaidjournals.org
263	American ceramic society bulletin	0	D ceramics.org H www.ceramics.org:80	www.ceramics.org
264	American Economic Association	0	DJ aeaweb.org HJ www.aeaweb.org:80 HJ pubs.aeaweb.org:80 HJ aeaweb.org:80 H www.aeaweb.org:443	https://www.aeaweb.org/
265	american fisheries society 2009 update	0	D afsjournals.org H afsjournals.org:80	http://afsjournals.org/
266	american journal of enology and viticulture	0	D ajevonline.org H www.ajeonline.org:80	http://www.ajeonline.org
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271	american journal of speech-language pathology	0	D ajslp.asha.org H ajslp.asha.org:80	http://ajslp.asha.org/
272	american mathematical society	0	DJ ams.org H www.ams.org:80	http://www.ams.org
273	American Meteorological Society	0	DJ ametsoc.org H journals.ametsoc.org:443	https://journals.ametsoc.org/
274	American mineralogist	0	D minsocam.org H www.minsocam.org:80	www.minsocam.org
275	American National Biography Online	0	DJ oxfordreference.com DJ oxfordreference.com DJ anb.org HJ www.anb.org:80 HJ www.anb.org:443	https://www.anb.org
276	American Nuclear Society Journals	0	D ans.org H www.ans.org:80	www.ans.org
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278	American Society of Agronomy	1	D agronomy.org H www.agronomy.org:80	http://www.agronomy.org/publications/
279	American Society of Hematology (updated 20190917)	0	DJ hematologylibrary.org DJ hematology.org DJ bloodjournal.org DJ asheducationbook.org DJ ashclinicalnews.org DJ ash-sap.org HJ www.bloodjournal.org:80 HJ www.bloodjournal.hematologylibrary.org:80 HJ www.asheducationbook.org:80 HJ www.ashclinicalnews.org:443 HJ www.ashclinicalnews.org:80 HJ www.ash-sap.org:80 HJ signin.hematology.org:80 HJ imagebank.hematology.org:80 HJ hematology.org:443 HJ bloodjournal.hematologylibrary.org:80 HJ ashpublications.org:443 HJ ashpublications.org:80 HJ asheducationbook.hematologylibrary.org:80 HJ ash-sap.org:80 HJ www.hematology.org:80 HJ www.hematology.org:443	https://www.hematology.org/
280	american vacuum society	0	DJ avspublications.org H avspublications.org:80	http://avspublications.org/
281	Ancestry Library	0	DJ ancestrylibrary.proquest.com HJ ancestrylibrary.proquest.com:443	https://ancestrylibrary.proquest.com
282	Ancient History Bulletin	0	D ancienthistorybulletin.org H www.ancienthistorybulletin.org:80	http://www.ancienthistorybulletin.org
283	Anesthesia and Analgesia	0	D anesthesiology.org H www.anesthesiology.org:80	http://www.anesthesia-analgesia.org
284	aNexis Uni	2	HJ lexisnexis.com:80 HJ lexis.com:80 HJ signin.lexisnexis.com:80 HJ advance.lexis.com:80 HJ www.nexisuni.com:443 HJ www.nexisuni.com:80 DJ nexisuni.com DJ signin.lexisnexis.com DJ advance.lexis.com DJ lexis.com DJ lexisnexis.com HJ advance.lexis.com:443 H nexisuni.com:80	http://nexisuni.com
285	Animal Sheltering Online	0	D animalsheltering.org H www.animalsheltering.org:80	http://www.animalsheltering.org
286	Annales de la Faculté des Sciences de Toulouse Mathématiques	0	D afst.cedram.org D www.numdam.org H aif.cedram.org:80	http://afst.cedram.org/cgi-bin/feuilleter

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287	Annales de limnologie	0	D limnology-journal.org H www.limnology-journal.org:80	www.limnology-journal.org
288	Annales des sciences mathematiques du Quebec	0	D www.labmath.uqam.ca H www.labmath.uqam.ca:80	http://www.labmath.uqam.ca/~annales/english/indexgeneral.html
289	Annales Geophysicae	0	D .copernicus.org H www.copernicus.org:80	http://www.copernicus.org/EGU/annales/annegeo.htm
290	Annals of clinical microbiology and antimicrobials	0	D ann-clinmicrob.com H www.ann-clinmicrob.com:80	www.ann-clinmicrob.com
291	Annals of forest science	0	D afs-journal.org H www.afs-journal.org:80	www.afs-journal.org
292	Annals of Pharmacotherapy	0	D theannals.com H www.theannals.com:80	http://www.theannals.com
293	Annals of surgery	0	D annalsofsurgery.com H www.annalsofsurgery.com:80	http://www.annalsofsurgery.com
294	Annals of the New York Academy of Sciences	0	D annalsnyas.org H www.annalsnyas.org:80	http://www.annalsnyas.org
295	Annual Reviews	0	DJ annualreviews.org HJ vision.annualreviews.org:80 HJ virology.annualreviews.org:80 HJ statistics.annualreviews.org:80 HJ soc.annualreviews.org:80 HJ resource.annualreviews.org:80 HJ pubhealth.annualreviews.org:80 HJ psych.annualreviews.org:80 HJ polisci.annualreviews.org:80 HJ plant.annualreviews.org:80 HJ phyto.annualreviews.org:80 HJ physiol.annualreviews.org:80 HJ physchem.annualreviews.org:80 HJ pharmtox.annualreviews.org:80 HJ pathmechdis.annualreviews.org:80 HJ orgpsych.annualreviews.org:80 HJ nutr.annualreviews.org:80 HJ nucl.annualreviews.org:80 HJ neuro.annualreviews.org:80 HJ micro.annualreviews.org:80 HJ med.annualreviews.org:80 HJ matsci.annualreviews.org:80 HJ marine.annualreviews.org:80 HJ linguistics.annualreviews.org:80 HJ lawsocsci.annualreviews.org:80 HJ immunol.annualreviews.org:80 HJ genom.annualreviews.org:80 HJ genet.annualreviews.org:80 HJ food.annualreviews.org:80 HJ fluid.annualreviews.org:80 HJ financial.annualreviews.org:80 HJ ento.annualreviews.org:80 HJ energy.annualreviews.org:80 HJ economics.annualreviews.org:80 HJ ecolsys.annualreviews.org:80 HJ earth.annualreviews.org:80 HJ conmatphys.annualreviews.org:80 HJ clinpsy.annualreviews.org:80 HJ chembioeng.annualreviews.org:80 HJ cellbio.annualreviews.org:80 HJ biophys.annualreviews.org:80 HJ bioeng.annualreviews.org:80 HJ biochem.annualreviews.org:80 HJ astro.annualreviews.org:80 HJ arplant.annualreviews.org:80 HJ arjournals.annualreviews.org:80 HJ arcompsci.annualreviews.org:80 HJ anthro.annualreviews.org:80 HJ animal.annualreviews.org:80 HJ anchem.annualreviews.org:80 HJ annualreviews.org:80 HJ www.annualreviews.org:80 H www.annualreviews.org:443	https://www.annualreviews.org
296	Anthropological Index	0	D ukc.ac.uk D anthropology.org.uk H lucy.ukc.ac.uk:80 H aio.anthropology.org.uk:80	http://lucy.ukc.ac.uk/AIO.html
297	AnthroSource	0	DJ wiley.com HJ anthrosource.onlinelibrary.wiley.com:80	http://anthrosource.onlinelibrary.wiley.com
298	Aozora Bunko	0	D www.aozora.gr.jp H www.aozora.gr.jp:80	http://www.aozora.gr.jp/
299	AP Images	0	DJ apimages.com HJ www.apimages.com:80	http://www.apimages.com
300	AP Photo Archive	1	DJ accuweather.com DJ ap.org H accuweather.ap.org:80	http://accuweather.ap.org
301	AP Stylebook	0	D apstylebook.com H www.apstylebook.com:443	https://www.apstylebook.com
302	APA APPI Psychiatry Online	0	D psychiatryonline.org D psychiatryonline.com H www.psychiatryonline.com:80 H psychservices.psychiatryonline.org:80 H neuro.psychiatryonline.org:80 H ajp.psychiatryonline.org:80 H ap.psychiatryonline.org:80	http://www.psychiatryonline.com
303	APA PsycNET	0	DJ psycinfo.com DJ apa.org HJ psyctherapyalpha.apa.org:443 HJ psyctherapy.apa.org:443 HJ www.psycinfo.com:80 HJ www.apa.org:80 HJ search.apa.org:80	https://psycnet.apa.org

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304	Apeiron	0	D redshift.vif.com H redshift.vif.com:80	http://redshift.vif.com
305	Apidologie	0	D www.apidologie.org H www.apidologie.org:80	www.apidologie.org
306	Applied Optics	0	D osa.org H ao.osa.org:80	http://ao.osa.org
307	Approved methods of the American association of cereal chemists	0	D aaccnet.org H methods.aaccnet.org:80	methods.aaccnet.org
308	APS Image Database	0	DJ imagedatabase.apsnet.org H imagedatabase.apsnet.org:443	https://imagedatabase.apsnet.org/
309	APS Journals Online	0	D physiology.org H www.physiology.org:80	http://www.physiology.org
310	Aquatic Mammals	0	D aquaticmammalsjournal.org H www.aquaticmammalsjournal.org:80	http://www.aquaticmammalsjournal.org/
311	Arab World geographer	0	D arabworldgeographer.org H arabworldgeographer.org:80	http://arabworldgeographer.org
312	ARBAonline	0	D librariesunlimited.com H arba.librariesunlimited.com:80	http://arba.librariesunlimited.com
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314	Archaeopress	0	DJ archaeopress.com H www.archaeopress.com:80	http://www.archaeopress.com
315	ArchiveGrid	0	D archivegrid.org H archivegrid.org:80	http://archivegrid.org
316	Archives of Pathology	0	D archivesofpathology.org H www.archivesofpathology.org:80	www.archivesofpathology.org
317	arctic institute of north america (AINA)	0	D synergiesprairies.ca H arctic.synergiesprairies.ca:80	http://arctic.synergiesprairies.ca/
318	ArkivMatematik	0	D arkivformatematik.org H www.arkivformatematik.org:80	http://www.arkivformatematik.org
319	Arkivoc 2004	0	D www.arkat-usa.org H www.arkat-usa.org:80	http://www.arkat-usa.org
320	Armed Conflict	0	D iiss.org H acd.iiss.org:443	https://acd.iiss.org
321	Artfilms Digital	0	DJ artfilms-digital.com H artfilms-digital.com:443	https://artfilms-digital.com/
322	ARTFL Project	0	D uchicago.edu H artfl-project.uchicago.edu:80	http://artfl-project.uchicago.edu
323	Arthroscopy	0	D arthroscopyjournal.org H www.arthroscopyjournal.org:80	http://www.arthroscopyjournal.org
324	ARTstor	0	DJ artstor.org HJ www.artstor.org:80 H library.artstor.org:80	http://library.artstor.org
325	Arxiv	0	D arxiv.org H arxiv.org:80	http://arxiv.org
326	ASEE	0	D asee.org H www.asee.org:80	www.asee.org
327	ASHRAE	0	D techstreet.com H subscriptions.techstreet.com:80	http://subscriptions.techstreet.com/products/list
328	ASHRAE resource center	0	D resourcecenter.ashrae.org H resourcecenter.ashrae.org:80	http://resourcecenter.ashrae.org/store/ashrae/
329	Asia Art Archive	0	DJ aaa.org.hk H www.aaa.org.hk:8019	http://www.aaa.org.hk:8019
330	Asia studies full text online	0	D asia-studies.com H www.asia-studies.com:80	http://www.asia-studies.com/
331	AsiaInt	0	D asiaint.com H www.asiaint.com:80	http://www.asiaint.com
332	AskART	0	D askart.com H www.askart.com:80	http://www.askart.com/
333	ASM alloy phase diagram center	0	D asminternational.org H www1.asminternational.org:80	http://www1.asminternational.org/asmenterprise/apd/
334	ASM handbooks	0	D asminternational.org H products.asminternational.org:80	http://products.asminternational.org/hbk/index.jsp
335	Association of American Geologists	0	D aag.org H www.aag.org:80	http://www.aag.org/cs/publications/special/guide
336	Association of Research Libraries	0	DJ agilepdf.com DJ arl.org H secure.agilepdf.com:443 HJ publications.arl.org:80 HJ www.arl.org:80	https://secure.agilepdf.com
337	ASTM Compass	0	DJ compass.astm.org HJ compass.astm.org:80 H compass.astm.org:443	https://compass.astm.org
338	ASTM	0	DJ micronex.com DJ astm.org HJ www.astm.org:80	https://www.astm.org

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339	ASTM Journals	0 HJ www.astm.org :80 HJ journalsip.astm.org :80 DJ astm.org H enterprise.astm.org :80	http://enterprise.astm.org
340	Astronomy and Astrophysics	0 D anda.org H www.anda.org :80	www.anda.org
341	ATILF (Analyse et Traitement Informatique de la Langue Francaise)	0 D atilf.fr H atilf.fr :80	http://atilf.atilf.fr/tif.htm
342	Atlantic Geology	0 D unb.ca H journals.hil.unb.ca :80	http://journals.hil.unb.ca
343	Atlantic monthly	0 D theatlantic.com H www.theatlantic.com :80	www.theatlantic.com
344	ATS Journals Online	0 D atsjournals.org H www.atsjournals.org :80	http://www.atsjournals.org
345	Attention, perception & psychophysics	0 D app.psychonomic-journals.org H app.psychonomic-journals.org :80	http://app.psychonomic-journals.org
346	Audio engineering society	0 D aes.org H www.aes.org :80	http://www.aes.org/journal/inst/
347	Audit bureau of circulations	0 DJ auditedmedia.com H abcas3.auditedmedia.com :80	http://abcas3.auditedmedia.com
348	Australia and New Zealand Health Policy	0 D anzhealthpolicy.com H www.anzhealthpolicy.com :80	www.anzhealthpolicy.com
349	austrian academy of sciences	0 D oeaw.ac.at H www.oeaw.ac.at :80	http://www.oeaw.ac.at
350	bbc shakespeare plays	0 DJ ambrosevideo.com DJ iriseducation.org DJ ambrosecdigital.com HJ ambrosevideo.com :80 HJ www.ambrosevideo.com :80 HJ dma.iriseducation.org :80 HJ www.ambrosecdigital.com :80 HJ videos.ambrosecdigital.com :80	http://videos.ambrosecdigital.com
351	BCC Research	0 DJ bccresearch.com H www.bccresearch.com :80	http://www.bccresearch.com
352	Begell house publisher	0 D begellhouse.com H www.begellhouse.com :80	www.begellhouse.com
353	bentham science publishers	0 D eurekaselect.com H 64.22.110.58:80 H eurekaselect.com :80	http://eurekaselect.com
354	Berghahn Journals	0 DJ berghahnjournals.com HJ www.berghahnjournals.com :80	http://www.berghahnjournals.com
355	Berkeley Electronic Press	0 D bepress.com H www.bepress.com :80	http://www.bepress.com
356	Biblical Archaeology Society	0 DJ baslibrary.org DJ biblicalarchaeology.org DJ basarchive.org DJ bib-arch.org HJ www.baslibrary.org :80 HJ www.bib-arch.org :80 HJ www.biblicalarchaeology.org :80 H www.basarchive.org :80	http://www.basarchive.org/
357	Bibliographie der deutschen Sprach- und Literaturwissenschaft	0 D bdsi-online.de H www.bdsi-online.de :80	www.bdsi-online.de
358	Big Bridge Volume 2	0 D www.bigbridge.org H www.bigbridge.org :80	http://www.bigbridge.org
359	Biochemistry and Molecular Biology Education	0 D bambed.org H www.bambed.org :80	http://www.bambed.org
360	Biodiversity Heritage Library	1 D archive.org H www.archive.org :80	www.archive.org
361	BioMed Central	0 D biologicalproceduresonline.com H www.biologicalproceduresonline.com :80	http://www.biologicalproceduresonline.com/
362	Biomedcentral	0 D biomedcentral.com H oas.biomedcentral.com :80 H www.biomedcentral.com :80	http://www.biomedcentral.com
363	Biomedical engineering online	0 D biomedical-engineering-online.com H www.biomedical-engineering-online.com :80	www.biomedical-engineering-online.com/
364	BioOne	0 DJ bioone.org HJ www.bioone.org :80 HJ www.bioone.org :443	https://www.bioone.org/
365	Biophysical Journal	0 D biophysj.org H www.biophysj.org :80	http://www.biophysj.org
366	Bioscientifica	0 DJ bioscientifica.com HJ rep.bioscientifica.com :443 HJ joe.bioscientifica.com :443 HJ jme.bioscientifica.com :443 HJ erc.bioscientifica.com :443 H eje.bioscientifica.com :443	https://eje.bioscientifica.com
367	Biotechniques	0 D biotechniques.com H www.biotechniques.com :80	www.biotechniques.com
368	Biotechnology and applied biochemistry	0 D www.babonline.org H www.babonline.org :80	http://www.babonline.org
369	Biotechnology for biofuels	0 D biotechnologyforbiofuels.com H www.biotechnologyforbiofuels.com :80	www.biotechnologyforbiofuels.com
370	Birds of the World	0 DJ birdsoftheworld.org H birdsoftheworld.org :443	https://birdsoftheworld.org
371	BizMiner	0 DJ bizminer.com	https://www.bizminer.com

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372	Blackwell	0 D www.blackwell.com H www.blackwell.com:80	http://www.blackwell.com/
373	Blackwell encyclopedia of sociology online	0 D sociologyencyclopedia.com H www.sociologyencyclopedia.com:80	www.sociologyencyclopedia.com
374	Blackwell Reference	0 D blackwellreference.com H www.blackwellreference.com:80	http://www.blackwellreference.com/
375	Blackwell-compass	0 D www.blackwell-compass.com H www.blackwell-compass.com:80	http://www.blackwell-compass.com/
376	Bloomberg Law	0 DJ bna.com DJ bloomberglaw.com HJ wsauth.bna.com:443 HJ wsauth.bna.com:80 HJ bloomberglaw.com:443 HJ bloomberglaw.com:80 HJ beta.bloomberglaw.com:443 HJ beta.bloomberglaw.com:80 HJ www.bloomberglaw.com:80 H www.bloomberglaw.com:443	https://www.bloomberglaw.com
377	Bloomsbury Applied Visual Arts (updated 20200331)	0 DJ bloomsburyappliedvisualarts.com HJ bloomsburyappliedvisualarts.com:443 HJ bloomsburyappliedvisualarts.com:80 HJ www.bloomsburyappliedvisualarts.com:80 HJ www.bloomsburyappliedvisualarts.com:443	https://www.bloomsburyappliedvisualarts.com/
378	Bloomsbury Architecture Library (updated 20200331)	0 DJ bloomsburyarchitecturelibrary.com HJ bloomsburyarchitecturelibrary.com:443 HJ bloomsburyarchitecturelibrary.com:80 HJ www.bloomsburyarchitecturelibrary.com:80 HJ www.bloomsburyarchitecturelibrary.com:443	https://www.bloomsburyarchitecturelibrary.com/
379	Bloomsbury Collections (updated 20200331)	0 DJ bloomsburycollections.com HJ www.bloomsburycollections.com:80 HJ bloomsburycollections.com:443 HJ bloomsburycollections.com:80 HJ www.bloomsburycollections.com:443	https://www.bloomsburycollections.com/
380	Bloomsbury Cultural History (updated 20200331)	0 DJ bloomsburyculturalhistory.com HJ www.bloomsburyculturalhistory.com:80 HJ bloomsburyculturalhistory.com:443 HJ bloomsburyculturalhistory.com:80 HJ www.bloomsburyculturalhistory.com:443	https://www.bloomsburyculturalhistory.com/
381	Bloomsbury Design Library (updated 20200331)	0 DJ bloomsburyledesignlibrary.com HJ bloomsburyledesignlibrary.com:443 HJ bloomsburyledesignlibrary.com:80 HJ www.bloomsburyledesignlibrary.com:80 HJ www.bloomsburyledesignlibrary.com:443	https://www.bloomsburyledesignlibrary.com/
382	Bloomsbury Early Years (updated 20200331)	0 DJ bloomsburyearlyyears.com HJ bloomsburyearlyyears.com:443 HJ bloomsburyearlyyears.com:80 HJ www.bloomsburyearlyyears.com:80 HJ www.bloomsburyearlyyears.com:443	https://www.bloomsburyearlyyears.com
383	Bloomsbury Education and Childhood Studies (updated 20200331)	0 DJ becs-bloomsbury.com HJ becs-bloomsbury.com:443 HJ becs-bloomsbury.com:80 HJ www.becs-bloomsbury.com:80 HJ www.becs-bloomsbury.com:443	https://www.becs-bloomsbury.com/
384	Bloomsbury Encyclopedia of Philosophers (updated 20200331)	0 DJ bloomsburyphilosophers.com HJ bloomsburyphilosophers.com:443 HJ bloomsburyphilosophers.com:80 HJ www.bloomsburyphilosophers.com:80 HJ www.bloomsburyphilosophers.com:443	https://www.bloomsburyphilosophers.com/
385	Bloomsbury Fashion Central (updated 20200331)	0 DJ bloomsburyfashioncentral.com DJ bergfashionlibrary.com HJ bloomsburyfashioncentral.com:80 HJ www.bergfashionlibrary.com:80 HJ www.bloomsburyfashioncentral.com:80 H www.bloomsburyfashioncentral.com:443	https://www.bloomsburyfashioncentral.com
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387	Bloomsbury Food Library (updated 20200331)	0 DJ bloomsburyfoodlibrary.com HJ bloomsburyfoodlibrary.com:443 HJ bloomsburyfoodlibrary.com:80 HJ www.bloomsburyfoodlibrary.com:80	https://www.bloomsburyfoodlibrary.com/

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389 Bloomsbury Popular Music (updated 20200331)	0	DJ bloomsburypopularmusic.com HJ bloomsburypopularmusic.com:443 HJ bloomsburypopularmusic.com:80 HJ www.bloomsburypopularmusic.com:80 HJ www.bloomsburypopularmusic.com:443	https://www.bloomsburypopularmusic.com/
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391 Books 24x7	0	DJ books24x7.com H library.books24x7.com:80	http://library.books24x7.com/library.asp?^B
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400 British Computer Society	0	D bcs.org.uk	http://www.bcs.org.uk

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401	British History Online	0 D british-history.ac.uk H www.british-history.ac.uk :80	www.british-history.ac.uk/report.aspx?compid=53997
402	British Journal of Cancer	0 D bjcancer.com H www.bjcancer.com :80	http://www.bjcancer.com
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404	British Online Archives	0 DJ microform.digital HJ connect.liblynx.com :443 H microform.digital :443	https://microform.digital
405	BrowZine by Third Iron	0 DJ browzine.com HJ auth.browzine.com :80 HJ www.browzine.com :80 HJ api.browzine.com :80 HJ browzine.com :80	http://browzine.com
406	Bryn Mawr Classical Review 2004	0 D ccat.sas.upenn.edu H ccat.sas.upenn.edu :80	http://ccat.sas.upenn.edu
407	BSAVA Library	0 DJ bsavalibrary.com H www.bsavalibrary.com :443	https://www.bsavalibrary.com
408	BuildingGreen	0 DJ buildinggreen.com HJ www.buildinggreen.com :80 HJ www2.buildinggreen.com :80 H www2.buildinggreen.com :443	https://www2.buildinggreen.com
409	Bulletin of atomic scientists	0 D thebulletin.org H www.thebulletin.org :80	www.thebulletin.org
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411	Bulletin of the Chemical Society of Japan	0 D openj-gate.org H www.openj-gate.org :80	http://www.openj-gate.org/
412	Bulletin of the Chemical Society of Japan	0 DJ csj.jp H www.journal.csj.jp :80	http://www.journal.csj.jp
413	Business week	0 D businessweek.com H www.businessweek.com :80	www.businessweek.com
414	Orbis (updated 20170830)	0 DJ bvinfo.com DJ bvdep.com HJ orbis4.bvinfo.com :443 HJ orbis2.bvdep.com :443 HJ orbis.bvdep.com :443 HJ orbis.bvinfo.com :443 HJ orbis4.bvinfo.com :80 HJ orbis2.bvdep.com :80 HJ orbis.bvdep.com :80 HJ neworbis.bvinfo.com :80 HJ orbis.bvinfo.com :80 HJ neworbis.bvinfo.com :443	https://neworbis.bvinfo.com/ip
415	CABDirect	0 D cabdirect.org H www.cabdirect.org :80	http://www.cabdirect.org/
416	CABI Compendium	0 D cabicompendium.org H www.cabicompendium.org :80	http://www.cabicompendium.org
417	CABI Publishing	0 D cabweb.org H www.cabweb.org :80	http://www.cabweb.org
418	cabi.org	0 D cabi.org H www.cabi.org :80	www.cabi.org
419	Cabinet Magazine	0 DJ cabinetmagazine.org HJ www.cabinetmagazine.org :80	http://www.cabinetmagazine.org
420	Cable and Wireless	0 D digisle.net H www.digisle.net :80	http://www.digisle.net
421	Cahiers du recherche	0 D umontreal.ca H www.cireq.umontreal.ca :80	http://www.cireq.umontreal.ca/publications.html#cahiers
422	CAIRN	0 D cairn.info H www.cairn.info :80	http://www.cairn.info
423	CAIRN International	0 DJ cairn-int.info H www.cairn-int.info :80	http://www.cairn-int.info
424	Cambridge Core (updated 20191022)	0 DJ cambridge.org HJ www.stahonline.cambridge.org :80 HJ www.orlando.cambridge.org :80 HJ www.journals.cambridge.org :80 HJ www.dib.cambridge.org :80 HJ www.cambridge.org :80 HJ www.africabibliography.cambridge.org :80 HJ universitypublishingonline.org :80 HJ stahonline.cambridge.org :80 HJ orlando.cambridge.org :80 HJ journals.cambridge.org :80 HJ www.stahonline.cambridge.org :443 HJ www.orlando.cambridge.org :443 HJ www.journals.cambridge.org :443 HJ www.dib.cambridge.org :443 HJ www.africabibliography.cambridge.org :443 HJ universitypublishingonline.org :443 HJ stahonline.cambridge.org :443 HJ orlando.cambridge.org :443 HJ journals.cambridge.org :443 HJ ebooks.cambridge.org :443 HJ dib.cambridge.org :443 HJ cambridge.org :443 HJ africabibliography.cambridge.org :443 HJ ebooks.cambridge.org :80 HJ dib.cambridge.org :80 HJ cambridge.org :80 HJ africabibliography.cambridge.org :80 HJ www.cambridge.org :443	https://www.cambridge.org/core

425	Cambridge Scientific Abstracts	0	D csa3.com D csa2.com D csa.com H www.csa3.com:80 H www.csa2.com:80 H www.csa.com:80	http://www.csa3.com
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436	CCH Intelliconnect	0	DJ wolterskluwer.com DJ cch.com DJ wkcheetah.com HJ login.wolterskluwer.com:443 HJ login.intelliconnect.cch.com:443 HJ intelliconnect.cch.com:443 H intelliconnect.cch.com:80	http://intelliconnect.cch.com
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444	Cell stem cell	0	D cellstemcell.com H www.cellstemcell.com:80	www.cellstemcell.com
445	Census Bureau	1	D census.gov H www.census.gov:80	http://www.census.gov
446	Cental and Eastern European Online Library	0	D ceeol.com H www.ceeol.com:80	http://www.ceeol.com
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448	Center for Immigration Studies	0	D cis.org H cis.org:80	http://cis.org/
449	Center for Research Libraries	0	D crl.edu H dds.crl.edu:80 H www.crl.edu:80	http://www.crl.edu
450	Central Asia and the Caucasus Journal	0	DJ ca-c.org H www.ca-c.org:80	http://www.ca-c.org
451	Central European Journal of Chemistry	0	D cesj.com H www.cesj.com:80	http://www.cesj.com
452	CETD	0	D airtilibrary.com H www.airtilibrary.com:80	http://www.airtilibrary.com/
453	chandos	0	D chandospublishingonline.com H www.chandospublishingonline.com:80	http://www.chandospublishingonline.com
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456	Chat Reference	0	DJ interact3.247ref.org H interact3.247ref.org:80	http://interact3.247ref.org
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459	Chemistry Letters	0	D csj.jp H www.csj.jp:80	http://www.csj.jp/journals/chem-lett/index.html
460	Chemistry letters	0	D jstage.jst.go H www.jstage.jst.go.jp:443	https://www.jstage.jst.go.jp/browse/cl
461	Chemistry.org	0	D chemistry.org H www.chemistry.org:80	http://www.chemistry.org
462	Chemnetbase	0	D chemnetbase.com D polymersdatabase.com	
463	Chest	0	D chestnet.org H journal.publications.chestnet.org:80	journal.publications.chestnet.org
464	Chicago Manual of Style Online	0	DJ login.chicagomanualofstyle.org DJ chicagomanualofstyle.org HJ login.chicagomanualofstyle.org:80 HJ chicagomanualofstyle.org:80 HJ www.chicagomanualofstyle.org:80 H www.chicagomanualofstyle.org:443	https://www.chicagomanualofstyle.org
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469	Chinese Newspapers	0	DJ data.people.com.cn H data.people.com.cn:80	http://data.people.com.cn
470	choice	0	D cro3.org D cro2.org H www.cro3.org:80 H www.cro2.org:80	www.cro3.org
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473	Churchill Archive (updated 20200331)	0	DJ churchillarchive.com HJ churchillarchive.com:80 H www.churchillarchive.com:80	http://www.churchillarchive.com/
474	Citeseer	0	D citeseer.ist.psu.edu H citeseer.ist.psu.edu:80	http://citeseer.ist.psu.edu
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476	CLCWeb Volume 6 (2004)	0	D clcwebjournal.lib.purdue.edu H clcwebjournal.lib.purdue.edu:80	http://clcwebjournal.lib.purdue.edu
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478	CogNet	0	D cognet.mit.edu H cognet.mit.edu:80	http://cognet.mit.edu
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481	Columbia Gazetteer of the World Online	0	D columbiagazetteer.org H www.columbiagazetteer.org:80	http://www.columbiagazetteer.org
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486	Competition Policy International (CPI)	0	HJ competitionpolicyinternational.com:80 H www.competitionpolicyinternational.com:443	https://www.competitionpolicyinternational.com
487	Comprehensive Composite Materials	0	D compcompmat.com H www.compcompmat.com:80	http://www.compcompmat.com
488	Congressional Digest	0	D congressionaldigest.com H www.congressionaldigest.com:80	http://www.congressionaldigest.com/
489	Congressional Quarterly Resources	0	HJ library.cq.com:80 HJ jsd.cq.com:80 HJ fsd.cq.com:80 HJ csd.cq.com:80 DJ cq.com DJ cqpress.com H library2.cqpress.com:80 HJ library.cqpress.com:80	http://library2.cqpress.com
490	connect journals	0	D connectjournals.com H www.connectjournals.com:80	http://www.connectjournals.com/
491	Cornell Library Chat Reference	0	D 247ref.org H cornell.247ref.org:80	http://cornell.247ref.org
492	Cornell Library Electronic Texts	0	H ebooks.library.cornell.edu:80 H etext.library.cornell.edu:80	http://ebooks.library.cornell.edu
493	Cornell Library RMC Collections	0	H rmc.library.cornell.edu:80	rmc.library.cornell.edu/MESLatCU/MESLEMO/default.html
494	Cornell Library Windows on the Past	0	H historical.library.cornell.edu:80	http://historical.library.cornell.edu

495	Cornell University Image Collections	0	H library24.library.cornell.edu:80 H culuna.library.cornell.edu:80 H library24.library.cornell.edu:8082 H culuna.library.cornell.edu:8082 H insight.library.cornell.edu:80	http://library24.library.cornell.edu:8082
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517	Data Planet	0	D conquestsystems.com H data-planet.conquestsystems.com:80	http://data-planet.conquestsystems.com/statistical/ip
518	Database of Chinese classic ancient books	0	DJ wenzibase.com H server.wenzibase.com:80	http://server.wenzibase.com/loginUser.action
519	dbpia database	0	D www.dbpia.co.kr H www.dbpia.co.kr:80	http://www.dbpia.co.kr/
520	Deal pipeline	0	DJ thedeal.com H pipeline.thedeal.com:80	http://pipeline.thedeal.com
521	Der literarische Expressionismus	0	D saur.de H db.saur.de:80	http://db.saur.de/LEX/
522	Deutsche National Bibliothek	0	D dnb.de H www.dnb.de:80	http://www.dnb.de
523	Diagnostic Pathology	0	D diagnosticpathology.org H www.diagnosticpathology.org:80	http://www.diagnosticpathology.org/
524	Dialogue A Journal of Mormon Thought	0	DJ dialoguejournal.com H www.dialoguejournal.com:443	https://www.dialoguejournal.com
525	Dictionary of American Regional English (DARE)	0	DJ daredictionary.com H www.daredictionary.com:443	https://www.daredictionary.com/
526	Dictionary of Old English A-G	0	D utoronto.ca H tapor.library.utoronto.ca:80	http://tapor.library.utoronto.ca/doe/dict/help/aboutdoeonlineindex.html
527	Dig Zeitschriften	0	D digzeitschriften.de H www.digzeitschriften.de:80	http://www.digzeitschriften.de
528	Digital Concert Hall	0	DJ digitalconcerthall.com H www.digitalconcerthall.com:443	https://www.digitalconcerthall.com
529	Digital Dictionary of Buddhism	0	D buddhism-dict.net H www.buddhism-dict.net:80	http://www.buddhism-dict.net/dbb
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541	Drama Online (updated 20200331)	0	DJ dramaonlinelibrary.com HJ dramaonlinelibrary.com:443 HJ dramaonlinelibrary.com:80 HJ www.dramaonlinelibrary.com:80 HJ www.dramaonlinelibrary.com:443	https://www.dramaonlinelibrary.com/
542	DRAMOnline	0	H proxy.dramonline.org:80	http://proxy.dramonline.org
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557	eArticle	0	DJ earticle.net H www.earticle.net:80	http://www.earticle.net
558	East View Information Service	1	DJ eastview.com DJ cnki.net HJ bib.eastview.com:80 H im.eastview.com:443 H bib.eastview.com:443 H dlib.eastview.com:80 H kotobarabia.eastview.com:80 H oversea.cnki.net:80 H cnki.en.eastview.com:80 H udbstat.eastview.com:80 H chinanew.eastview.com:80 H www.eastview.com:80 H eng.oversea.cnki.net:80 H wnc.eastview.com:80	https://irn.eastview.com
559	Ebook Central Proxied	0	DJ ebookcentral.proquest.com HJ ebookcentral.proquest.com:80 H ebookcentral.proquest.com:443	https://ebookcentral.proquest.com/lib/cornell
560	ebrary	1	DJ ebrary.com H site.ebrary.com:80	http://site.ebrary.com/lib/cornell
561	EBSCO LinkSource	0	HJ linksource.ebsco.com:443 HJ linksource.ebsco.com:80	http://linksource.ebsco.com
562	EBSCOhost	0	HJ www.europeanamericana.com:80 DJ teacherreference.com HJ www.teacherreference.com:80 DJ smartimagebase.com DJ netlibrary.com DJ ebsco.com HJ www.ebsconet.com:80 HJ support.ebsco.com:80 DJ epnet.com DJ ebscohost.mobi DJ ebscohost.com HJ e.ebsco.com:80 HJ flipster.ebsco.com:80 HJ support.ebscohost.com:80 HJ therapy.ebscohost.com:80 HJ exports.ebscohost.com:80 HJ www.netlibrary.com:80 HJ web.ebscohost.com:80 HJ web.e.ebscohost.com:80 HJ web.d.ebscohost.com:80 HJ web.c.ebscohost.com:80 HJ web.b.ebscohost.com:80 HJ web.a.ebscohost.com:80 HJ search.epnet.com:80 HJ search.ebscohost.mobi:80 HJ resolver.ebscohost.com:80 HJ openurl.ebscohost.com:80 HJ m.ebscohost.com:80 HJ eoncontent.ebscohost.com:80 HJ connection.ebscohost.com:80 HJ ehis.ebscohost.com:80 HJ eds.e.ebscohost.com:80 HJ eds.d.ebscohost.com:80 HJ eds.c.ebscohost.com:80 HJ eds.b.ebscohost.com:80 HJ eds.a.ebscohost.com:80 HJ ebsco.smartimagebase.com:80 HJ openurl.ebscohost.com:443 HJ www.ebscohost.com:443 HJ resolver.ebscohost.com:443 HJ search.ebscohost.com:443 H search.ebscohost.com:80	http://search.ebscohost.com/login.aspx
563	Econometric Society	0	D econometricsociety.org H www.econometricsociety.org:80	www.econometricsociety.org
564	Economic and Political Weekly	0	DJ epw.in HJ epw.in:80 HJ www.epw.org.in:80 H www.epw.in:80	http://www.epw.org.in/
565	economic geology	0	D economicgeology.org H economicgeology.org:80	http://economicgeology.org/
566	Economics Policy Institute	0	D epinet.org H www.epinet.org:80	http://www.epinet.org/
567	Economist	0	D economist.com H www.economist.com:80	www.economist.com
568	Edinburgh Law Review	0	D eupjournals.com H www.eupjournals.com:80	www.eupjournals.com
569	Edinburgh University Press	0	DJ eupublishing.com HJ edinburghuniversitypress.com:443 H edinburghuniversitypress.com:80 HJ eupublishingblog.com:443 H eupublishingblog.com:80 HJ eupublishing.com:443 H eupublishing.com:80 H www.eupjournals.com:80 H www.eupublishing.com:80 HJ www.eupublishing.com:443	https://www.eupublishing.com/action/showPublications?display=bySubject&pubType=journal
570	EDP SCIENCES PORTAL	0	DJ edpsciences.org D ed-phys.fr	http://www.edpsciences.org

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571	Education Week	0	D edweek.org H www.edweek.org:80	http://www.edweek.org
572	eDuke Books Scholarly Collection	0	DJ dukeupress.edu HJ www.dukeupress.edu:80 HJ reader.dukeupress.edu:80 HJ read.dukeupress.edu:80	http://read.dukeupress.edu
573	eHRAF world cultures	0	D ehrafWorldCultures.yale.edu H ehrafWorldCultures.yale.edu:80	http://ehrafWorldCultures.yale.edu
574	EIU Business Intelligence Database	0	D db.eiu.com H db.eiu.com:80	http://db.eiu.com
575	EIU Country Data	0	DJ economistconferences.com DJ viewswire.com DJ eiu.com D countrydata.bvdep.com H www.eiu.com:80 H countrydata.bvdep.com:80	http://www.eiu.com/Cornell
576	El Croquis	0	DJ elcroquisdigital.com H elcroquisdigital.com:443	https://elcroquisdigital.com
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578	Electronic Arts Intermix	0	DJ eai.org H www.eai.org:80	http://www.eai.org
579	Electronic Enlightenment	0	D e-enlightenment.com H www.e-enlightenment.com:80	http://www.e-enlightenment.com
580	Electronic resource management in libraries	0	D igi-online.com H reference.igi-online.com:80	http://reference.igi-online.com/search/basic.asp
581	Elements magazine (Mineralogical Society of America)	0	D elementsmagazine.org H www.elementsmagazine.org:80	http://www.elementsmagazine.org
582	Elgaronline (updated 20170110)	0	DJ advancedintros.com DJ elgaronline.com DJ e-elgar.co.uk HJ www.advancedintros.com:80 HJ www.e-elgar.co.uk:80 HJ www.advancedintros.com:443 HJ www.elgaronline.com:443 HJ elgaronline.com:443 HJ elgaronline.com:80 HJ e-elgar.co.uk:80 HJ www.elgaronline.com:80	http://www.elgaronline.com/
583	Elsevier health journals	0	DJ elsevierhealth.com DJ secure.jbs.elsevierhealth.com DJ journals.elsevierhealth.com HJ us.elsevierhealth.com:80 HJ us.elsevierhealth.com:443 HJ www.us.elsevierhealth.com:443 HJ id.elsevier.com:443 HJ secure.jbs.elsevierhealth.com:443 HJ www.journals.elsevierhealth.com:80 HJ www.journals.elsevierhealth.com:443	https://www.journals.elsevierhealth.com/
584	Elsevier Health Services	0	D harcourthealth.com D wbsaunders.com DJ us.elsevierhealth.com H vetsurg.wbsaunders.com:80 H www.us.elsevierhealth.com:80 H www.harcourthealth.com:80	http://vetsurg.wbsaunders.com
585	eMarketer	0	D emarketer.com H totalaccess.emarketer.com:443	https://totalaccess.emarketer.com/Extranet.aspx?cornelluniversity
586	Emerald (updated 20190624)	0	DJ emerald.com HJ www.emerald.com:80 H www.emerald.com:443	https://www.emerald.com/insight
587	Emergence: Complexity and Organization	0	D emergence.org H emergence.org:80	http://emergence.org/
588	Emporis	0	D emporis.com H www.emporis.com:80	http://www.emporis.com/en
589	Encyclopaedia Britannica	0	D britannica.com D eb.com H www.britannica.com:80 H search.eb.com:80	http://search.eb.com
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591	Encyclopedia of Astronomy and Astrophysics	0	D eaa.iop.org D ency-astro.com H eaa.iop.org:80 H www.ency-astro.com:80	http://eaa.iop.org
592	Encyclopedia of Life Sciences	0	DJ els.net H www.els.net:80	http://www.els.net
593	Encyclopedia of social work	0	D oxfordre.com H socialwork.oxfordre.com:80	http://socialwork.oxfordre.com
594	Encyclopedia of the Enlightenment	0	D oxford-enlightenment.com H www.oxford-enlightenment.com:80	www.oxford-enlightenment.com
595	EndNote online and InCites (updated 20191003)	7	DJ clarivate.com HJ incites.isiknowledge.com:80 HJ error.incites.clarivate.com:80 HJ login.incites.clarivate.com:80 HJ help.incites.clarivate.com:80 HJ incites.clarivate.com:443 DJ incites.clarivate.com HJ jcr.clarivate.com:443 HJ esi.clarivate.com:443	http://www.myendnoteweb.com

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597	Engineering Information	0	D ei.org H www.ei.org:80	http://www.ei.org
598	Engineering Village	0	DJ referexengineering.elsevier.com DJ engineeringvillage.com DJ ei.org HJ acw.elsevier.com:80 HJ www.engineeringvillage2.org:80 HJ engineeringvillage.com:80 HJ www.engineeringvillage.com:80 H www.engineeringvillage.com:443	https://www.engineeringvillage.com
599	Entomological Society of America	0	DJ entsoc.org H www.entsoc.org:80	http://www.entsoc.org
600	entomological society of canada	0	D esc-sec.ca H www.esc-sec.ca:80 H pubs.esc-sec.ca:80	http://www.esc-sec.ca
601	Environment and planning	0	D envplan.com H www.envplan.com:80	http://www.envplan.com
602	Environmental health	0	D ehjournal.net H www.ehjournal.net:80	http://www.ehjournal.net
603	EPS China Data	0	DJ epsnet.com.cn H olap.epsnet.com.cn:80	http://olap.epsnet.com.cn
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605	ERIC	0	D www.eric.ed.gov H www.eric.ed.gov:80	http://www.eric.ed.gov
606	ERIC Document Reproduction Service	0	D edrs.com H edrs.com:80 H www.edrs.com:80	http://edrs.com
607	Erudit	0	D erudit.org H id.erudit.org:80	http://id.erudit.org/
608	ESAIM	0	D esaim-cocv.org H www.esaim-cocv.org:80	www.esaim-cocv.org
609	ESAIM Mathematical modeling	0	D esaim-m2an.org H www.esaim-m2an.org:80	http://www.esaim-m2an.org
610	ESG Manager on Campus	0	D msci.com H esgdirect.msci.com:443	https://esgdirect.msci.com
611	Estudios Interdisciplinarios de America Latina y el Caribe	0	D tau.ac.il H www.tau.ac.il:80	http://www.tau.ac.il/eial/
612	Ethnic, Minority and Native Press (ProQuest)	0	D softlineweb.com H www.softlineweb.com:80	http://www.softlineweb.com
613	Ethnologue: languages of the world	0	D ethnologue.com H www.ethnologue.com:443	https://www.ethnologue.com/
614	ethnology pitt	0	D ethnology.pitt.edu H ethnology.pitt.edu:80	http://ethnology.pitt.edu/ojs/index.php/Ethnology
615	Europa World	0	D europaworld.com H www.europaworld.com:80	http://www.europaworld.com
616	European Journal of International Law	0	D ejil.org H ejil.org:80 H www.ejil.org:80	http://www.ejil.org
617	European journal of social security	0	D ejss.eu H www.ejss.eu:80	www.ejss.eu
618	European mathematical society	0	D ems-ph.org H www.ems-ph.org:80	www.ems-ph.org
619	European Patent Office	0	D espacenet.com H www.espacenet.com:80	http://www.espacenet.com
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622	Exact Editions (updated 20190410)	0	DJ exacteditions.com HJ shop.exacteditions.com:80 HJ reader.exacteditions.com:80 HJ login.exacteditions.com:80 HJ www.exacteditions.com:443 HJ shop.exacteditions.com:443 HJ reader.exacteditions.com:443 HJ login.exacteditions.com:443 HJ exacteditions.com:443 HJ exacteditions.com:80 H www.exacteditions.com:80	http://www.exacteditions.com/
623	Experimental Biology and Medicine	0	D ebmonline.org H www.ebmonline.org:80	http://www.ebmonline.org
624	Expert reviews	0	D expert-reviews.com H www.expert-reviews.com:80	http://www.expert-reviews.com
625	Extreme Right Movements in Europe	0	DJ archive-it.org HJ wayback.archive-it.org:80 HJ archive-it.org:80 H archive-it.org:443	https://archive-it.org/collections

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657	Gallup Analytics	0	DJ gallup.com H analyticscampus.gallup.com:443	https://analyticscampus.gallup.com
658	Gastroenterology	0	DJ elsevierhealth.com DJ gastrojournal.org H us.elsevierhealth.com:80 H www2.us.elsevierhealth.com:80 H www2.gastrojournal.org:80	http://www2.us.elsevierhealth.com/inst/serve?db=home&id=gast
659	GBC Elko NV Database for images	0	D groveart.org H www.groveart.org:80	http://www.groveart.org
660	GBV - Gemeinsamer Bibliotheksverbund	0	D gbv.de H www.gbv.de:80	http://www.gbv.de
661	GEM (Greenwood Publishing Group) Web Sites	0	H greenwood.com:80 D gemdb1.greenwood.com D gemapp1.greenwood.com D gemcas1.greenwood.com D gemcas.greenwood.com D gemweb2.greenwood.com D gemweb1.greenwood.com D arba.lu.com D cmg.lu.com D hornbook.greenwood.com D ebooks.greenwood.com D www.urbdocs.com D www.authors4teens.com D gem.greenwood.com D wct.greenwood.com D dailylife.greenwood.com H arba.lu.com:80 H cmg.lu.com:80 H hornbook.greenwood.com:80 H ebooks.greenwood.com:80 H www.urbdocs.com:80 H www.authors4teens.com:80 H gem.greenwood.com:80 H wct.greenwood.com:80 H dailylife.greenwood.com:80	http://arba.lu.com
662	Gender studies in agriculture	0	D library.wur.nl H www.library.wur.nl:80	www.library.wur.nl
663	Genders 2004	0	D www.genders.org H www.genders.org:80	http://www.genders.org
664	Genes & Development	0	D genesdev.org H www.genesdev.org:80	http://www.genesdev.org
665	Genetics Selection Evolution	0	D gse-journal.org H www.gse-journal.org:80	http://www.gse-journal.org
666	Genevestigator	0	DJ genevestigator.com H genevestigator.com:443	https://genevestigator.com
667	Genome Biology	0	D genomebiology.com H www.genomebiology.com:80	http://www.genomebiology.com
668	Genome Research	0	D genome.org H www.genome.org:80	http://www.genome.org
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670	GeoLytics	0	D geolytics.com H geolytics.com:80	http://geolytics.com/
671	Geometry and topology	0	D msp.warwick.ac.uk H www.msp.warwick.ac.uk:80	www.msp.warwick.ac.uk
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674	Glasnik Matemacki	1	DJ math.hr DJ unizg.hr HJ web.math.hr:80 H web.math.pmf.unizg.hr:443	https://web.math.pmf.unizg.hr
675	Global Access	0	D primark.com H www.primark.com:80	http://www.primark.com
676	Global Net	0	D globalnet.com D links.globalnet2.com H links.globalnet2.com:80 H links.globalnet.com:80	http://links.globalnet2.com
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678	Google	0	DJ recaptcha.net HJ recaptcha.net:443	http://www.google.com

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679	google scholar	2	D scholar.google.com H scholar.google.com:80	http://scholar.google.com/
680	Grand Robert de la langue française	0	D demarque.com H lerober.demarque.com:80 H syrano.demarque.com:80	http://lerobert.demarque.com/fr/ca/dictionnaire-en-ligne/
681	Greenleaf Online Library	0	D gseresearch.com H www.gseresearch.com:80	http://www.gseresearch.com/gol
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688	Gutenberg-e	0	DJ gutenberg-e.org H usearch.cc.columbia.edu:80 H www.gutenberg-e.org:80	http://www.gutenberg-e.org
689	Handbook of the birds of the world	0	D hbw.com H www.hbw.com:80	http://www.hbw.com/user
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694	Harvard Education Publishing Group (updated 20190410)	0	DJ hepinc.com HJ hepinc.com:80 HJ www.hepinc.com:80 DJ edreview.org HJ edreview.org:80 HJ www.edreview.org:80 DJ allenpress.com HJ pinnacle.allenpress.com:80 DJ hepg.org HJ her.hepg.org:80 DJ hepgjournals.org HJ www.hepg.org:443 HJ www.hepg.org:80 HJ www.hepgjournals.org:443 HJ www.hepgjournals.org:80 HJ hepg.org:80 HJ hepgjournals.org:80	http://hepgjournals.org/
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696	Health and quality of life outcomes	0	D hqlo.com H www.hqlo.com:80	http://www.hqlo.com
697	Health research systems and policies	0	D health-policy-systems.com H www.health-policy-systems.com:80	www.health-policy-systems.com
698	Hebrew-Arabic Dictionary (Trial)	0	DJ ac.il H arabdictionary.huji.ac.il:443	https://arabdictionary.huji.ac.il/
699	HeinOnline	0	DJ heinonline.org HJ www.heinonline.org:443 HJ home.heinonline.org:443 HJ heinonline.org:443 HJ home.heinonline.org:80 HJ heinonline.org:80 HJ www.heinonline.org:80	http://www.heinonline.org/HOL/
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701	Henry Stewart Talks	0	D hstalks.com H hstalks.com:80	http://hstalks.com
702	HEP libraries webzine	0	D cern.ch H library.web.cern.ch:80	http://library.web.cern.ch/library/Webzine/index.shtml
703	Hepatology	0	D hepatology.aasldjournals.org H hepatology.aasldjournals.org:80	http://hepatology.aasldjournals.org
704	HeritageQuest Online	0	DJ heritagequestonline.com HJ www.heritagequestonline.com:443	https://www.heritagequestonline.com
705	Heron Publishing	0	D heronpublishing.com H heronpublishing.com:80	http://heronpublishing.com
706	Herpetological conservation and biology	0	D herpconbio.org H www.herpconbio.org:80	www.herpconbio.org
707	High Temperatures - High Pressures	0	D hthpweb.com H www.hthpweb.com:80	http://www.hthpweb.com
708	HighWire	0	D highwire.stanford.edu H highwire.stanford.edu:80	http://highwire.stanford.edu

709	Hispanic American Journals	0	D hapi.ucla.edu H hapi.ucla.edu:80	http://hapi.ucla.edu/
710	Histology and histopathology	0	D www.hh.um.es H www.hh.um.es:80	http://www.hh.um.es/
711	History Cooperative	0	D historycoop.org D historycooperative.org H www.historycooperative.org:80	http://www.historycooperative.org
712	hotel business review	0	D hotelexecutive.com H hotelexecutive.com:80	http://hotelexecutive.com
713	houston math journal	0	D www.math.uh.edu H www.math.uh.edu:80	http://www.math.uh.edu/
714	Human Kinetics Journals	0	DJ humankinetics.com H journals.humankinetics.com:80	http://journals.humankinetics.com/
715	Human Kinetics Library (updated 20200331)	0	DJ humankineticslibrary.com HJ humankineticslibrary.com:443 HJ humankineticslibrary.com:80 HJ www.humankineticslibrary.com:80 HJ www.humankineticslibrary.com:443	https://www.humankineticslibrary.com
716	Human Rights Review	0	D metapress.com H transactionpub.metapress.com:80	http://transactionpub.metapress.com
717	Humanities and social science online	0	D h-net.org H www.h-net.org:80	www.h-net.org
718	IBISWorld	0	DJ procurementiq.com DJ ibisworld.ca DJ ibisworld.com.au DJ ibisworld.co.uk DJ ibisworld.com.cn DJ ibisworld.com HJ client.procurementiq.com:80 HJ clients1.ibisworld.de:80 HJ clients1.ibisworld.ca:80 HJ clients1.ibisworld.co.uk:80 HJ clients1.ibisworld.com.au:80 HJ clients1.ibisworld.com:80 HJ client.procurementiq.com:443 HJ clients1.ibisworld.de:443 HJ clients1.ibisworld.ca:443 HJ clients1.ibisworld.co.uk:443 HJ clients1.ibisworld.com.au:443 HJ clients1.ibisworld.com:443 HJ www.procurementiq.com:80 HJ www.ibisworld.cn:80 HJ www.ibisworld.de:80 HJ www.ibisworld.co.uk:80 HJ www.ibisworld.ca:80 HJ www.ibisworld.com.au:80 HJ www.ibisworld.com:80 HJ www.ibisworld.cn:443 HJ www.ibisworld.de:443 HJ www.ibisworld.co.uk:443 HJ www.ibisworld.ca:443 HJ www.ibisworld.com.au:443 H www.ibisworld.com:443 H my.ibisworld.com:443	https://www.ibisworld.com
719	ICE Virtual Library	0	D icevirtuallibrary.com H www.icevirtuallibrary.com:80	www.icevirtuallibrary.com
720	IDEAL	0	D idealibrary.com H www.idealibrary.com:80	http://www.idealibrary.com
721	IDEALReferenceWorks	0	D apreslp.gvpi.net H apreslp.gvpi.net:80	http://apreslp.gvpi.net
722	IEE Online Journals	0	D ioj.iee.org.uk H ioj.iee.org.uk:80	http://ioj.iee.org.uk
723	IEEE	0	DJ ieee.org H xplore2.ieee.org:80 H www.ieee.org:80 H www.ieeeexplore.ws:80	http://www.ieee.org/
724	IEEE Computer Society Digital Library	0	D computer.org H csdl2.computer.org:80	http://csdl2.computer.org
725	IET Digital Library	0	DJ theiet.org H digital-library.theiet.org:443	https://digital-library.theiet.org
726	IGI Global	4	DJ igi-global.com H www.igi-global.com:80	http://www.igi-global.com
727	iGroup	0	D igpublish.com H portal.igpublish.com:443 H portal.igpublish.com:80	https://portal.igpublish.com/
728	ILI	0	D ili-info.com H www.ili-info.com:80	http://www.ili-info.com
729	Imaging	0	D imaging.birjournals.org H imaging.birjournals.org:80	http://imaging.birjournals.org
730	IMF eLibrary Statistics	0	DJ imfstistics.orgN HJ www.imfbookstore.org:80 HJ www.imf.org:80 HJ www.imfstistics.org:80 HJ elibrary.imf.org:80 HJ www.elibrary.imf.org:80 HJ datahelp.imf.org:80 HJ data.imf.org:80 DJ imf.org H elibrary-arear.imf.org:80 HJ elibrary-data.imf.org:80	http://elibrary-arear.imf.org/
731	Immunity Online	0	D immunity.com H www.immunity.com:80	http://www.immunity.com
732	Implementation science	0	D implementationscience.com H www.implementationscience.com:80	www.implementationscience.com
733	Import Genius	0	D importgenius.com H www.importgenius.com:443	https://www.importgenius.com/edu/cornell

734 InCites (updated 20141103)	0	DJ incites.thomsonreuters.com H incites.thomsonreuters.com:443	https://incites.thomsonreuters.com
735 ICLR.3	1	DJ iclr.co.uk HJ www.iclr.co.uk:80 H iclr.co.uk:443	https://iclr.co.uk
736 Independent Publisher	0	D independentpublisher.com H www.independentpublisher.com:80	http://www.independentpublisher.com
737 Reveal Digital Independent Voices	0	DJ revealdigital.com HJ voices.revealdigital.com:80 H voices.revealdigital.com:443	https://voices.revealdigital.com
738 Index of Medieval Art	0	DJ princeton.edu H theindex.princeton.edu:443	https://theindex.princeton.edu
739 Index to Hebrew Periodicals	0	DJ exlibrisgroup.com H haifa-primo.hosted.exlibrisgroup.com:80	http://haifa-primo.hosted.exlibrisgroup.com
740 Index to Hebrew Periodicals (delete after 9/30/17)	0	DJ ac.il H ihp.haifa.ac.il:80	http://ihp.haifa.ac.il/
741 Index to Theses in Great Britain and Ireland	0	D theses.com H www.theses.com:80	http://www.theses.com
742 Indian journal of medical research	0	D ijmr.org.in H www.ijmr.org.in:80	www.ijmr.org.in
743 Indian journal of pharmacology	0	D ijp-online.com H www.ijp-online.com:80	http://www.ijp-online.com/
744 indian journals	0	D indianjournals.com H www.indianjournals.com:80	http://www.indianjournals.com/
745 Indiana University mathematics journal	0	D iumj.indiana.edu H www.iujm.indiana.edu:80	www.iujm.indiana.edu
746 Indiana University press	0	D iupress.org H www.inscribe.iupress.org:80	www.inscribe.iupress.org
747 indiastat	0	D www.indiastat.com H www.indiastat.com:80	http://www.indiastat.com/
748 Indo-European Studies (updated 20191015)	0	DJ jiesonline.com HJ jiesonline.com:80 HJ jiesonline.com:443 HJ www.jiesonline.com:443 H www.jiesonline.com:80	http://www.jiesonline.com
749 Industrial Revolution in America	0	DJ abc-clio.com H ebooks.abc-clio.com:443	https://ebooks.abc-clio.com/?978-1-85109-754-8
750 Infancy archives	0	D infancyarchives.com H www.infancyarchives.com:80	http://www.infancyarchives.com
751 informa healthcare	0	D informahealthcare.com H informahealthcare.com:80	http://informahealthcare.com/
752 informaworld	0	D informaworld.com H www.informaworld.com:80	http://www.informaworld.com
753 INFORMS Journals	0	D informs.org H transci.journal.informs.org:80 H orgsci.journal.informs.org:80 H orjournal.informs.org:80 H mor.journal.informs.org:80 H mktsci.journal.informs.org:80 H msom.journal.informs.org:80 H mansci.journal.informs.org:80 H interfaces.journal.informs.org:80 H isr.journal.informs.org:80 H joc.journal.informs.org:80 H da.journal.informs.org:80 H pubsonline.informs.org:80 H journals.informs.org:80 H www.informs.org:80	http://transci.journal.informs.org
754 InfoTrac	0	D infotrac-custom.com H www.infotrac-custom.com:80	http://www.infotrac-custom.com
755 Ingeniare	0	D scielo.cl H www.scielo.cl:80	www.scielo.cl
756 IngentaConnect	0	HJ saturn.bids.ac.uk:80 DJ ingentaconnect.com H gsego.publisher.ingentaconnect.com:80 H berghahn.publisher.ingentaconnect.com:80 H www.ingentaconnect.com:80	http://gsego.publisher.ingentaconnect.com/content/collection/gse_gol2013
757 Innovest iRatings	0	D innovestgroup.com H i-ratings.innovestgroup.com:80	http://i-ratings.innovestgroup.com
758 Insights: the newsletter of the John Dewey Society	0	D cuip.net D johndeweyociety.org H cuip.net:80	http://cuip.net/jds/insights/index.htm
759 Institute of Mathematics (Polish Academy of Sciences) Publications	0	D journals.impan.gov.pl H journals.impan.gov.pl:80	http://journals.impan.gov.pl
760 institute of physics updated march 2010	0	D iopscience.iop.org H iopscience.iop.org:80	http://iopscience.iop.org
761 Instituto de Salud en el Tropic	0	D scielosp.org H www.scielosp.org:80	www.scielosp.org
762 Inter-Research Science Publisher	0	DJ int-res.com H www.int-res.com:80	http://www.int-res.com
763 Interiencia	0	D interiencia.org H www.interiencia.org:80	http://www.interiencia.org
764 Internarium 2004	0	D www.columbia.edu H www.columbia.edu:80	http://www.columbia.edu
765 Internantional Encyclopedia of Human Sexuality	0	D encyclopediaofhumansexuality.com H www.encyclopediaofhumansexuality.com:80	http://www.encyclopediaofhumansexuality.com/
766 International Abstracts In Operations Research	0	D iaor-palgrave.com	http://www.iaor-palgrave.com

		H	www.iaor-palgrave.com:80	
767	International abstracts of human resources	0	D humanresourcesabstracts.com H www.humanresourcesabstracts.com:80	http://www.humanresourcesabstracts.com/search2/
768	International bee research association	0	D ibra.org H www.ibra.org:80	www.ibra.org
769	International encyclopedia of communication online	0	D communicationencyclopedia.com H www.communicationencyclopedia.com:80	http://www.communicationencyclopedia.com
770	International Encyclopedia of Revolution and Protest	0	D revolutionprotestencyclopedia.com H www.revolutionprotestencyclopedia.com:80	www.revolutionprotestencyclopedia.com
771	International Financial Statistics	0	D apdi.net D ifs.net D ifs.apdi.net H ifs.apdi.net:80	http://ifs.apdi.net/imf/
772	International Foundation for Art Research	0	D ifar.org H www.ifar.org:80	http://www.ifar.org/art_law.php
773	International Journal for Equity in Health	0	D equityhealthj.com H www.equityhealthj.com:80	www.equityhealthj.com
774	International journal of behavioral nutrition and physical activity	0	D ijbnpa.org H www.ijbnpa.org:80	www.ijbnpa.org
775	International Journal of Developmental Biology	0	DJ eh.u.es H www.ijdb.ehu.es:80	http://www.ijdb.ehu.es
776	International journal of health geographics	0	D ij-healthgeographics.com H www.ij-healthgeographics.com:80	www.ij-healthgeographics.com
777	international journal of river basin management	0	D www.jrbm.net H www.jrbm.net:80	http://www.jrbm.net
778	International Studies Compendium Project	0	D isacompendium.com H www.isacompendium.com:80	http://www.isacompendium.com
779	International Who's Who	0	D worldwhoswho.com H www.worldwhoswho.com:80	http://www.worldwhoswho.com
780	Internet Archaeology	0	D intarch.ac.uk H intarch.ac.uk:80	http://intarch.ac.uk
781	Internet Journal of Chemistry	0	D ijc.com H www.ijc.com:80	http://www.ijc.com
782	Internet Movie Database	0	D imdb.com H www.imdb.com:80	www.imdb.com
783	Internet-Beiträge zur Ägyptologie und Sudanarchäologie	0	D hu-berlin.de H www2.hu-berlin.de:80	http://www2.hu-berlin.de
784	Investment Banking and Capital Markets Group	0	D disclosure.com H www.disclosure.com:80	http://www.disclosure.com
785	Iowa Academy of Science	0	D iowaacademyjournal.org H iowaacademyjournal.org:80	http://iowaacademyjournal.org
786	Iran Namag	0	DJ irannamag.com H www.irannamag.com:443	https://www.irannamag.com
787	iRatings	0	DJ msci.com HJ iratings.msci.com:80 H iratings.investgroup.com:80	iratings.investgroup.com
788	Irish veterinary journal	0	D irishvetjournal.org H www.irishvetjournal.org:80	www.irishvetjournal.org/
789	Israel Journal of Plant Science	0	D sciencefromisrael.com H www.sciencefromisrael.com:80	http://www.sciencefromisrael.com/openurl.asp?genre=journal&issn=0792-9978
790	Issues in ecology	0	D www.esa.org H www.esa.org:80	http://www.esa.org/science_resources/issues.php
791	issuu	0	D issuu.com H issuu.com:80	http://issuu.com
792	ITER Gateway to Middle Ages	0	DJ itergateway.org H search1.itergateway.org:80	http://search1.itergateway.org
793	jacobin	1	D jacobinmag.com H www.jacobinmag.com:443	https://www.jacobinmag.com
794	Jahrbuch der Osterreichischen Byzantinistik	0	D ac.at H www.byzneo.univie.ac.at:80	http://www.byzneo.univie.ac.at
795	JAMA Network	0	DJ jamanetwork.com DJ jamanetwork.org DJ jamaoncology.com HJ click.alerts.jamanetwork.com:80 HJ jamapsychiatry.jamanetwork.com:80 HJ amednews.com:80 HJ www.amednews.com:80 HJ amednews.com:443 HJ archderm.jamanetwork.com:80 HJ archfaci.jamanetwork.com:80 HJ archinte.jamanetwork.com:80 HJ archneur.jamanetwork.com:80 HJ archneurpsyc.jamanetwork.com:80 HJ archotol.jamanetwork.com:80 HJ archpedi.jamanetwork.com:80 HJ archpsyc.jamanetwork.com:80 HJ archsurg.jamanetwork.com:80 HJ cardiology.jamanetwork.com:80 HJ jama.ama-assn.org:80 HJ jama.jamanetwork.com:80 HJ jamaoncology.com:80 HJ oncology.jamanetwork.com:80 HJ pubs.ama-assn.org:80 HJ pubsearch.ama-assn.org:80 HJ virtualmentor.ama-assn.org:80 HJ archderm.jamanetwork.com:443 HJ archfaci.jamanetwork.com:443 HJ archinte.jamanetwork.com:443 HJ archneur.jamanetwork.com:443	https://jamanetwork.com

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796	Jane's	0 D janes.com H www.janes.com:80	www.janes.com
797	Japan Times Archives	0 D japantimes.co.jp H ipm-archives.japantimes.co.jp:80	http://ipm-archives.japantimes.co.jp
798	JapanKnowledge	0 DJ jkn21.com DJ japanknowledge.com H japanknowledge.com:80 H www.jkn21.com:80	http://japanknowledge.com
799	Jesus	0 D publishersrow.com H www.publishersrow.com:80	www.publishersrow.com
800	Jewish journal of sociology	0 D jewishjournalofsociology.org H jewishjournalofsociology.org:80	http://jewishjournalofsociology.org/
801	Jewish Review of Books	0 DJ jewishreviewofbooks.com H www.jewishreviewofbooks.com:443	https://www.jewishreviewofbooks.com
802	Jim Breen's WWWJDIC	0 D monash.edu.au H www.csse.monash.edu.au:80	http://www.csse.monash.edu.au/~jwb/cgi-bin/wwwjdic.cgi?1C.htm
803	John Benjamins e-Platform	0 DJ jbe-platform.com H www.jbe-platform.com:80	http://www.jbe-platform.com
804	Johns Hopkins Guide to Literary Theory	0 D jhu.edu H litguide.press.jhu.edu:80	http://litguide.press.jhu.edu/
805	Johns Hopkins University	0 D jhupress.jhu.edu H jhupress.jhu.edu:80	http://jhupress.jhu.edu
806	Johns Hopkins University Press	0 D press.jhu.edu H www.press.jhu.edu:80	http://www.press.jhu.edu
807	Journal de physique	0 D journaldephysique.org H jp4.journaldephysique.org:80 H jp3.journaldephysique.org:80	jp4.journaldephysique.org
808	Journal of agriculture, food systems, and community development	0 D AgDevJournal.com H AgDevJournal.com:80	http://AgDevJournal.com
809	Journal of Agriculture, Food Systems, and Community Development	0 DJ foodsystemsjournal.org H www.foodsystemsjournal.org:443	https://www.foodsystemsjournal.org
810	journal of apiproduct and apimedical science	0 D jaas.org.uk H www.jaas.org.uk:80	http://www.jaas.org.uk
811	Journal of Applied Physiology	0 D jap.org H www.jap.org:80	http://www.jap.org
812	Journal of biology	0 D jbiol.com H www.jbiol.com:80	www.jbiol.com
813	Journal of Biomolecular Structure and Dynamics	0 D jbsdonline.com H www.jbsdonline.com:80	http://www.jbsdonline.com
814	Journal of bone and mineral research	0 D www.jbmonline.org H www.jbmonline.org:80	http://www.jbmonline.org/
815	Journal of carcinogenesis	0 D carcinogenesis.com H www.carcinogenesis.com:80	www.carcinogenesis.com
816	Journal of Cell Science	0 D jcs.biologists.org H jcs.biologists.org:80	http://jcs.biologists.org
817	Journal of Chemical Physics	0 DJ aip.org HJ jcp.aip.org:80	http://jcp.aip.org
818	Journal of Clinical Investigation	0 D jci.org H www.jci.org:80	http://www.jci.org
819	Journal of Clinical Pharmacology	0 D jclinpharm.org H www.jclinpharm.org:80	http://www.jclinpharm.org/
820	Journal of cognitive science	0 D j-cs.org H j-cs.org:80	http://j-cs.org
821	Journal of computer-mediated communication	0 D indiana.edu H jcmc.indiana.edu:80	jcmc.indiana.edu
822	Journal of Consumer Satisfaction, Dissatisfaction and Complaining Behavior	0 DJ jcsdcb.com H jcsdcb.com:80	http://jcsdcb.com
823	Journal of Corporate Law Studies	0 D hartjournals.co.uk H www.hartjournals.co.uk:80	http://www.hartjournals.co.uk
824	Journal of Criminal Justice and Popular Culture Volume 10	0 D www.albany.edu H www.albany.edu:80	http://www.albany.edu
825	Journal of Dairy Science	0 D jds.fass.org H jds.fass.org:80	http://jds.fass.org
826	Journal of Electronic Imaging	0 D spie.org H spie.org:80 H www.spie.org:80	http://www.spie.org
827	Journal of Environmental Horticulture	0 D theknowledgecenter.com H hiresearch.theknowledgecenter.com:80	http://hiresearch.theknowledgecenter.com

828	Journal of ethnobiology and ethnomedicine	0	D ethnobiomed.com H www.ethnobiomed.com:80	http://www.ethnobiomed.com
829	Journal of Experimental Biology	0	D biologists.org H jeb.biologists.org:80	http://jeb.biologists.org
830	Journal of Food Protection	0	DJ jfoodprotection.org H jfoodprotection.org:80	http://foodprotection.org
831	Journal of Gerontological Nursing	0	D jognonline.com H www.jognonline.com:80	www.jognonline.com/bissue.asp
832	Journal of Great Lakes research	0	D iaglr.org H www.iaglr.org:80	http://www.iaglr.org
833	Journal of Green Building	0	D journalofgreenbuilding.com H www.journalofgreenbuilding.com:80	http://www.journalofgreenbuilding.com/
834	Journal of heterocyclic chemistry	0	D jhetchem.com H www.jhetchem.com:80	http://www.jhetchem.com
835	Journal of Histochemistry and Cytochemistry	0	D jhc.org H www.jhc.org:80	http://www.jhc.org
836	Journal of Horticultural Science and Biotechnology	0	D jhortscib.org H www.jhortscib.org:80	http://www.jhortscib.org/
837	Journal of Hydraulic Research	0	D iahr.net H www.journalhydraulicresearch.com: 80	http://www.journalhydraulicresearch.com/
838	Journal of Hydrolic Research	0	D iahr.org H www.iahr.org:80	http://www.iahr.org/
839	Journal of International Womens Studies 2004	0	D www.bridgew.edu H www.bridgew.edu:80	http://www.bridgew.edu
840	Journal of Investigative Dermatology	0	DJ jidonline.org H www.jidonline.org:80	http://www.jidonline.org
841	journal of levantine studies	0	D levantine-journal.org H www.levantine-journal.org:80	http://www.levantine-journal.org/
842	Journal of Lie theory	0	D emis.de H www.emis.de:80	www.emis.de
843	Journal of mechanics of materials and structures	0	D www.jomms.org H www.jomms.org:80	http://www.jomms.org/
844	Journal of Medical Devices	0	D asme.org H medicaldevices. asmedigitalcollection.asme.org:80	http://medicaldevices.asmedigitalcollection.asme.org/journal.aspx
845	Journal of modern European history	0	D chbeck.de H www.chbeck.de:80	www.chbeck.de/jmeh
846	Journal of multilingual and multicultural development	0	D multilingual-matters.net H www.multilingual-matters.net:80	www.multilingual-matters.net
847	Journal of Nanobiotechnology	0	D jnanobiotechnology.com H www.jnanobiotechnology.com:80	http://www.jnanobiotechnology.com
848	Journal of Natural Resources and Life Sciences Education	0	D jnrise.org H www.jnrise.org:80	http://www.jnrise.org
849	Journal of Neurochemistry	0	D jneurochem.org H www.jneurochem.org:80	http://www.jneurochem.org
850	Journal of Neuroengineering and Rehabilitation	0	D jneuroengrehab.com H www.jneuroengrehab.com:80	http://www.jneuroengrehab.com
851	Journal of neuroinflammation	0	D jneuroinflammation.com H www.jneuroinflammation.com:80	www.jneuroinflammation.com
852	Journal of Neurophysiology	0	D jn.physiology.org H jn.physiology.org:80	http://jn.physiology.org
853	Journal of Operational Research Society	0	D palgrave-journals.com H www.palgrave-journals.com:80	http://www.palgrave-journals.com
854	journal of optical networking	0	D www.osa-jon.org H www.osa-jon.org:80	http://www.osa-jon.org
855	Journal of Parenteral and Enteral Nutrition	0	D aspenjournals.org H jpen.aspenjournals.org:80	jpen.aspenjournals.org/
856	Journal of Pediatric Surgery	0	D www2.jpedsurg.org H www2.jpedsurg.org:80	http://www2.jpedsurg.org
857	Journal of periodontology	0	D joponline.org H www.joponline.org:80	http://www.joponline.org/loi/jop
858	Journal of Pharmacology	0	D jpet.org H www.jpet.org:80	http://www.jpet.org
859	Journal of power and energy	0	D pepublishing.com H www.pepublishing.com:80	www.pepublishing.com
860	Journal of Religion and Society 2004	0	D mores.creighton.edu H mores.creighton.edu:80	http://mores.creighton.edu
861	Journal of Rheology	0	D journalofrheology.org H journalofrheology.org:80	http://journalofrheology.org
862	Journal of Sedimentary Research	0	D sepmonline.org H jsedres.sepmonline.org:80	http://jsedres.sepmonline.org
863	Journal of Soil and Water Conservation	0	DJ jswconline.org H www.jswconline.org:80	http://www.jswconline.org/
864	Journal of statistical software	0	D jstatsoft.org H www.jstatsoft.org:80	www.jstatsoft.org
865	Journal of studies on alcohol and drugs	0	D www.jsad.com H www.jsad.com:80	http://www.jsad.com
866	Journal of Taphonomy	0	D journaltaphonomy.com H www.journaltaphonomy.com:80	http://www.journaltaphonomy.com
867	Journal of the American Academy of Dermatology	0	D eblue.org H www.eblue.org:80	http://www.eblue.org
868	Journal of the American College of Nutrition	0	D jacn.org H www.jacn.org:80	http://www.jacn.org

869	Journal of the American Society of Brewing Chemists	0	D asbcnet.org H www.asbcnet.org:80	http://www.asbcnet.org/journal/toc.htm
870	Journal of the IASS	0	D wdg.us H iass.wdg.us:80	iass.wdg.us
871	Journal of the IEST	0	D iestjournal.org H iestjournal.org:80	http://iestjournal.org
872	Journal of the international AIDS society	0	D jiasociety.org H www.jiasociety.org:80	http://www.jiasociety.org/
873	Journal of the International Association for Shell and Spatial Structures (IASS)	0	D iass-structures.org H www.iass-structures.org:80	http://www.iass-structures.org/
874	Journal of the International Qur'anic Studies Association	0	DJ lockwoodonlinejournals.com H lockwoodonlinejournals.com:80	http://lockwoodonlinejournals.com
875	Journal of the Optical Society of America	0	DJ josab.osa.org H josab.osa.org:80	http://josab.osa.org
876	Journal of the West	0	DJ abc-clio.com H journalofthewest.abc-clio.com:80	http://journalofthewest.abc-clio.com
877	Journal of translational medicine	0	D translational-medicine.com H www.translational-medicine.com:80	www.translational-medicine.com
878	Journal of Transport History	0	D man.ac.uk H journals.mup.man.ac.uk:80	http://journals.mup.man.ac.uk
879	Journal of veterinary diagnostic investigation	0	D jvdi.org H jvdi.org:80	jvdi.org
880	Journal of veterinary medical education	0	D www.jvmeonline.org H www.jvmeonline.org:80	http://www.jvmeonline.org/
881	journal of visualized experiments	0	DJ jove.com H www.jove.com:443	https://www.jove.com
882	Journal of Wildlife Diseases	0	D jwildlifedis.org H www.jwildlifedis.org:80	http://www.jwildlifedis.org
883	journal of wine economics	0	D wine-economics.org H www.wine-economics.org:80	http://www.wine-economics.org/
884	journalarchive	0	D www.journalarchive.jst.go.jp H www.journalarchive.jst.go.jp:80	http://www.journalarchive.jst.go.jp
885	journals of gerontology. Series A	0	D gerontologyjournals.org H biomed.gerontologyjournals.org:80	http://biomed.gerontologyjournals.org
886	journals of gerontology. Series B	0	D gerontologyjournals.org H psychsoc.gerontologyjournals.org:80	http://psychsoc.gerontologyjournals.org
887	Journals of Reproduction and Fertility	0	D jrf-journals.org.uk H www.jrf-journals.org.uk:80	http://www.jrf-journals.org.uk
888	jstage	0	D stage.jst.go.jp H www.jstage.jst.go.jp:80	http://www.jstage.jst.go.jp/
889	JSTOR	0	HJ links.jstor.org:80 DJ jstor.org H www.jstor.org:80	http://www.jstor.org/
890	Judges' part rules	0	D law.com H www.law.com:80	http://www.law.com
891	Juris Arbitration Law	0	D arbitrationlaw.com H arbitrationlaw.com:443	https://arbitrationlaw.com/
892	JustCit	0	D justcite.com H www.justcite.com:80	http://www.justcite.com/
893	Justis (updated 20180201)	8	DJ justis.com HJ justis.com:80 HJ library.justis.com:80 HJ www.justis.com:443 HJ justis.com:443 HJ library.justis.com:443 HJ app.justis.com:443 HJ app.justis.com:80 HJ www.justis.com:80	http://www.justis.com/
894	Kaltura	0	D kaltura.com H www.kaltura.com:443	https://www.kaltura.com/
895	Kanopy Streaming	0	D kanopy.com D kanopystreaming.com H cornell.kanopy.com:443 H cornell.kanopystreaming.com:443 H cornell.kanopy.com:80 H cornell.kanopystreaming.com:80	http://cornell.kanopy.com
896	Karger Journals	0	DJ karger.com H www.karger.com:443	https://www.karger.com
897	Keesing's world news archive	0	DJ keesings.com H keesings.com:80	http://keesings.com
898	KEGG Kyoto encyclopedia of genes and genomes.	0	D genome.jp H www.genome.jp:80	http://www.genome.jp/kegg/
899	kikuzo from asahi shinbunsha	0	DJ asahi.com H database.asahi.com:80	http://database.asahi.com/library2e/
900	Kindai dejitaru raiburarī	0	D kindai.ndl.go.jp H kindai.ndl.go.jp:80	http://kindai.ndl.go.jp/index.html
901	Kindlers Literatur Lexikon online	0	D cedion.de D kl-online.de H www.kl-online.de:80	http://www.kl-online.de
902	klapp online, bibliographie der französischen literaturwissenschaft	0	DJ klapp-online.de DJ klapponline.de H www.klapp-online.de:80	http://www.klapp-online.de
903	KLD Global Socrates	0	D kld.com H globalsocrates.kld.com:80	http://globalsocrates.kld.com
904	KLG Online	0	D nachschlage.net H www.nachschlage.net:80	http://www.nachschlage.net/search/query?query.id=query-16
905	KLGonline	0	D klgonline.de	http://www.klgonline.de/search/query?query.id=query-16

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906 Kluge Digital Resource	0	DJ freizo.org H kluge.freizo.org:443	https://kluge.freizo.org
907 Kluwer Arbitration	0	DJ kluwerarbitration.com HJ www.kluwerarbitration.com:80	http://www.kluwerarbitration.com
908 Kluwer Online	0	DJ kluweronline.com H ipsapp009.kluweronline.com:80 H www.kluweronline.com:80	http://www.kluweronline.com
909 Kluwer: Language of Science	0	D wkap.com H www.wkap.com:80	http://www.wkap.com
910 Kluwer: Law Online	0	D kluwerlawonline.com H www.kluwerlawonline.com:80	http://www.kluwerlawonline.com
911 Knovel (updated 20171004)	0	DJ knovel.com HJ app.knovel.com:443 HJ app.knovel.com:80 HJ www.knovel.com:443	https://www.knovel.com/
912 KnowItAll AnyWare	0	HJ knowitallanyware.com:80 DJ knowitallanyware.com H knowitallanyware.com:443	https://knowitallanyware.com
913 Kokkai kaigiroku kensaku shisutemu	0	D kokkai.ndl.go.jp H kokkai.ndl.go.jp:80	http://kokkai.ndl.go.jp/
914 KOLIS Network	0	D nl.go.kr H www.nl.go.kr:80	www.nl.go.kr/kolisnet/index.php
915 Korea A2Z	0	D encykorea.com D dbmedia.co.kr D koreaa2z.com H www.encykorea.com:80 H gate.dbmedia.co.kr:80 H www.koreaa2z.com:80	http://www.koreaa2z.com
916 Korean History and Culture Research Database	0	D excavation.co.kr H www.excavation.co.kr:80	http://www.excavation.co.kr
917 KP Journal	0	D kpjournal.com H www.kpjournal.com:80	http://www.kpjournal.com
918 krpia database	0	D krpia.co.kr H www.krpia.co.kr:80	http://www.krpia.co.kr/
919 KSDC DB	0	D ksdcdb.kr H www.ksdcdb.kr:80	http://www.ksdcdb.kr
920 Kyobo Scholar	0	DJ dkyobobook.co.kr H scholar.dkyobobook.co.kr:80	http://scholar.dkyobobook.co.kr
921 L & H Scientific Publishing	0	D lhscientificpublishing.com H www.lhscientificpublishing.com:443	https://www.lhscientificpublishing.com/
922 L'Annee philologique	0	D lesbelleslettres.com D annee-philologique.com H www.lesbelleslettres.com:80 H www.annee-philologique.com:80	http://www.annee-philologique.com
923 Lab Animal	0	D labanimal.com H www.labanimal.com:80	http://www.labanimal.com/laban/archive/index.html
924 Laboratory animals	0	D www.rsmjournals.com H www.la.rsmjournals.com:80	http://www.la.rsmjournals.com
925 LandScan Global	0	D cartographic.com H wms.cartographic.com:443	https://wms.cartographic.com/LandScan/
926 Landslide	0	D landslides.com H landslides.com:80	http://landslides.com/
927 Latin American Public Opinion Project	0	DJ datasets.americasbarometer.org HJ www.vanderbilt.edu:80 H www.vanderbilt.edu:443	https://www.vanderbilt.edu/lapop/
928 Latin American newsletters	0	D latinnews.com H www.latinnews.com:80	http://www.latinnews.com
929 Law360	0	D law360.com H www.law360.com:80	http://www.law360.com
930 LAWnB	0	DJ lawnb.com HJ www.lawnb.com:80 H cornell.lawnb.com:80	http://cornell.lawnb.com
931 Le Lait	0	D www.lelait-journal.org H www.lelait-journal.org:80	http://www.lelait-journal.org
932 LEA Online	0	D leaonline.com H www.leaonline.com:80	http://www.leaonline.com
933 Leadership Connect	0	DJ leadershipconnect.io HJ app.leadershipconnect.io:80 H app.leadershipconnect.io:443	https://app.leadershipconnect.io/
934 Learning & Memory	0	D learnmem.org H www.learnmem.org:80	http://www.learnmem.org
935 LexisNexis	2	HJ companydashboard.lexisnexis.nl:80 HJ nexis.com:80 HJ www.nexis.com:80 HJ w3.nexis.com:443 HJ w3.nexis.com:80 HJ w3.lexis.com:80 HJ www.lexiscn.com:80 HJ www.lexis.com:80 HJ academic.lexisnexis.nl:443 HJ www.nexis.com:443 HJ www.lexisnexis.com:80 HJ www.lexis-nexis.com:80 HJ widgetserver.lexisnexis.nl:80 HJ web.lexisnexis.com:80 HJ web.lexis-nexis.com:80 DJ nexis.com DJ cispubs.com DJ lexiscn.com DJ lexis.com	https://www.lexisnexis.com/hottopics/lnacademic

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936	LibLynx (updated 20190624)	0 DJ liblynx.com HJ connect.liblynx.com:80 H connect.liblynx.com:443	https://connect.liblynx.com
937	Library of Congress	0 D www.loc.gov H www.loc.gov:80	http://www.loc.gov
938	libraweb	0 D libraweb.net H www.libraweb.net:80	http://www.libraweb.net
939	Lieberman Index	0 D lieberman-index.org H lieberman-index.org:80	http://lieberman-index.org
940	Liebert	0 DJ liebertpub.com HJ www.liebertpub.com:80 HJ www.liebertonline.com:80 HJ online.liebertpub.com:80 HJ liebertpub.com:80 HJ liebertonline.com:80 H www.liebertpub.com:443	https://www.liebertpub.com
941	Limnology and Oceanography	0 D aslo.org H www.aslo.org:80	http://www.aslo.org
942	Linguistics Abstracts Online	0 D blackwellpublishers.co.uk DJ linguisticsabstracts.com H linguisticsabstracts.com:80 H www.linguisticsabstracts.com:80 H labs.blackwellpublishers.co.uk:80	http://www.linguisticsabstracts.com/LAO/index.jsp
943	Lipids in health and disease	0 D lipidworld.com H www.lipidworld.com:80	http://www.lipidworld.com
944	LLMC digital	0 DJ llmc.com DJ llmcdigital.org HJ llmcdigital.org:80 HJ www.llmcdigital.org:80 H www.llmc.com:80	http://www.llmc.com
945	LOCKSS Card 2005	0 D www.lockss.org H www.lockss.org:80	http://www.lockss.org
946	Loeb Classical Library	0 DJ loebclassics.com H www.loebclassics.com:443	https://www.loebclassics.com/
947	London Mathematical Society	0 D lms.ac.uk H www.lms.ac.uk:80	http://www.lms.ac.uk
948	london review of books	0 D lrb.co.uk H www.lrb.co.uk:80	http://www.lrb.co.uk/
949	longitudinal and life course studies	0 D llcsjournal.org H www.llcsjournal.org:80	www.llcsjournal.org
950	LWW Online	0 D lwonline.com H www.lwonline.com:80	http://www.lwonline.com
951	lyell collection	0 D lyellcollection.org H www.lyellcollection.org:80	http://www.lyellcollection.org/
952	M.E. Sharpe Journals	0 D metapress.com H metapress.com:80 H mesharpe.metapress.com:80	http://mesharpe.metapress.com/
953	Maastricht journal of European and comparative law	0 D maastrichtjournal.eu H www.maastrichtjournal.eu:80	www.maastrichtjournal.eu
954	magnolia press	0 D mapress.com H www.mapress.com:80	http://www.mapress.com
955	maisaku	0 D g-search.or.jp H dbs.g-search.or.jp:443	https://dbs.g-search.or.jp/WMAI/WMAI_ipcu_login.html
956	Majallat al-Urdun lil-shuʾūn al-dawlīyah	0 D id.gov.jo H www.id.gov.jo:80	http://www.id.gov.jo/publications.asp
957	Malaria journal	0 D malariajournal.com H www.malariajournal.com:80	http://www.malariajournal.com
958	Manas Media	0 DJ manasmedia.com H manasmedia.com:80	http://manasmedia.com
959	Manchester Hive (updated 20180725)	0 DJ manchesterhive.com HJ www.manchesterhive.com:80 H www.manchesterhive.com:443	https://www.manchesterhive.com
960	Manchester Openhive	0 DJ manchesteropenhive.com H www.manchesteropenhive.com:443	https://www.manchesteropenhive.com
961	Manchester University Press	0 D mup.mcc.ac.uk H mup.mcc.ac.uk:80	http://mup.mcc.ac.uk
962	Maney Online	0 D maneyonline.com H www.maneyonline.com:80	http://www.maneyonline.com
963	Manupatra	0 DJ manupatrafast.com DJ manupatra.com H www.manupatrafast.com:443	https://www.manupatrafast.com
964	Manupatra	0 DJ manupatrafast.com HJ www.manupatrafast.com:80 HJ www.manupatrafast.com:443	https://www.manupatrafast.com
965	Marine Ornithology	0 D marineornithology.org H www.marineornithology.org:80	www.marineornithology.org
966	Market analysis tools	0 D intracen.org H legacy.intracen.org:80	http://legacy.intracen.org/marketanalysis/
967	Market Research	0 D marketresearch.com H www.marketresearch.com:80	http://www.marketresearch.com
968	Marketline	0 DJ marketline.com H advantage.marketline.com:443	https://advantage.marketline.com/

969	marquis who's who	0	D search.marquiswhoswho.com H search.marquiswhoswho.com:80	http://search.marquiswhoswho.com
970	Material Connexion	0	D materialconnexion.com H www.materialconnexion.com:80	www.materialconnexion.com
971	material connexion 2011	0	D library.materialconnexion.com H library.materialconnexion.com:80	http://library.materialconnexion.com/home.aspx
972	Materials Research Society	0	D mrs.org H www.mrs.org:80	http://www.mrs.org
973	Mathematical proceedings of the Royal Irish Academy	0	D ria.ie H www.ria.ie:80	www.ria.ie
974	Mathematical research letters	0	D mrlonline.com H www.mrlonline.com:80	www.mrlonline.com
975	mathematical science publishers	0	D msp.org H msp.org:80	http://msp.org
976	MathSciNet	0	DJ ams.org H mathscinet.ams.org:443	https://mathscinet.ams.org
977	Mechanical engineering	0	D memagazine.org H www.memagazine.org:80	www.memagazine.org
978	Medicare (Spring 08)	0	D medpac.gov H www.medicare.gov:80	http://www.medicare.gov/documents/
979	Memory & cognition	0	D mc.psychonomic-journals.org H mc.psychonomic-journals.org:80	http://mc.psychonomic-journals.org
980	MEMSO	0	D www.tannerritchie.com H www.tannerritchie.com:80	http://www.tannerritchie.com/memsofront.php
981	MEMSO (Medieval and Early Modern Sources Online)	0	D tannerritchie.com H sources.tannerritchie.com:80	http://sources.tannerritchie.com/
982	Merck Index online	0	D cambridgesoft.com H themerckindex.cambridgesoft.com:80	themerckindex.cambridgesoft.com
983	Mercury	0	DJ asppublications.org H www.asppublications.org:80	http://www.asppublications.org
984	Mergent Archives (updated 20180620)	0	DJ mergentarchives.com HJ www.mergentarchives.com:80 H www.mergentarchives.com:443	https://www.mergentarchives.com/
985	Mergent Bond Viewer	0	DJ mergent.com HJ bv.mergent.com:80 H bv.mergent.com:443	https://bv.mergent.com
986	Mergent First Research	0	DJ firstresearch.com HJ mergent.firstresearch.com:80 HJ mergent.firstresearch-learn.com:80 H www.mergentonline.com:443	https://www.mergentonline.com/FirstResearch
987	Mergent Hoovers	0	DJ hoovers.com DJ mergent.com DJ mergentonline.com DJ subscriber-2.hoovers.com DJ subscriber.hoovers.com HJ subscriber-2.hoovers.com:80 HJ subscriber.hoovers.com:80 HJ subscriber.hoovers.com:443 H bv.mergent.com:80 H webreports.mergent.com:80 HJ www.mergentonline.com:80	https://subscriber.hoovers.com
988	Mergent Intellect	0	DJ mergentintellect.com H www.mergentintellect.com:443	https://www.mergentintellect.com/
989	Mergent Online	0	DJ mergentonline.com H www.mergentonline.com:443	https://www.mergentonline.com/
990	Mergents events data	0	D eventsdata.com H www.eventsdata.com:80	www.eventsdata.com
991	Merriam-Webster OnLine	0	D m-w.com H www.m-w.com:80	http://www.m-w.com
992	Met Opera on Demand	0	D metopera.org H metopera.org:80	http://metopera.org/ondemand/index.aspx
993	Meteoritics & planetary science	0	D meteoritics.org H meteoritics.org:80	http://meteoritics.org/
994	Methods in ecology and evolution	0	D methodsinecologyandevolution.org H www.methodsinecologyandevolution.org:80	www.methodsinecologyandevolution.org
995	MGG Online	0	DJ mgg-online.com H mgg-online.com:80	http://mgg-online.com
996	MHFI	0	DJ mhfi.com HJ sso.mhfi.com:443	https://sso.mhfi.com
997	Michigan Academician	0	DJ themichiganacademy.org H journal.themichiganacademy.org:80	http://journal.themichiganacademy.org
998	Michigan State University	0	D msu.edu H www.msu.edu:80	www.msu.edu
999	Microbe	0	D microbemagazine.org H www.microbemagazine.org:80	www.microbemagazine.org
1000	Microbial Cell Factories	0	D microbialcellfactories.com H www.microbialcellfactories.com:80	www.microbialcellfactories.com
1001	Microbiology	0	D microbiologyresearch.org H www.microbiologyresearch.org:80 H www.microbiologyresearch.org:443	http://www.microbiologyresearch.org
1002	Microbiology today	0	D sgm.ac.uk H www.sgm.ac.uk:80	www.sgm.ac.uk
1003	Micropaleontology	0	D micropress.org H www.micropress.org:80	http://www.micropress.org
1004	Middle East Research and Information Project	0	D merip.org H www.merip.org:80	http://www.merip.org

10 05	Mideast wire	0	D mideastwire.com H www.mideastwire.com:80	www.mideastwire.com
10 06	Mintel GNPD	0	DJ gnpd.com HJ portal.mintel.com:80 HJ www.gnpd.com:80	http://www.gnpd.com/sinatra/home/
10 07	Mintel Publications (Academic)	0	D gnpd.com D mintel.com HJ clients.mintel.com:443 HJ marketsizes.mintel.com:443 H academic.mintel.com:80 H www.gnpd.com:80 HJ academic.mintel.com:443 H portal.mintel.com:443	https://academic.mintel.com
10 08	Mintel Publications (Reports)	0	D reports.mintel.com H reports.mintel.com:80	http://reports.mintel.com
10 09	Mirabile	0	D mirabileweb.it H www.mirabileweb.it:80 H sip.mirabileweb.it:80	http://www.mirabileweb.it/
10 10	MIT Artificial Intelligence Lab	0	D ai.mit.edu H www.ai.mit.edu:80	http://www.ai.mit.edu
10 11	MIT E-journal of Middle East Studies 2004	0	D web.mit.edu H web.mit.edu:80	http://web.mit.edu
10 12	The MIT Press Direct (updated 20190410)	0	DJ mit.edu HJ direct.mit.edu:80 HJ direct.mit.edu:443	https://direct.mit.edu
10 13	MIT Press Journals	0	DJ mitpressjournals.org DJ lecalmanac.org H www.mitpressjournals.org:80 HJ www.leonardo.info:443 HJ www.lecalmanac.org:80 H mitpressjournals.org:80 HJ mitpress.mit.edu:443 H mitpress.mit.edu:80 H lecalmanac.org:80 H cognet.mit.edu:443 HJ cognet.mit.edu:80 HJ www.mitpressjournals.org:443	https://www.mitpressjournals.org
10 14	mmba (master brewers association of america)	0	D mbaa.com H tq.mbaa.com:80	http://tq.mbaa.com/
10 15	Mobilization Journal	0	D mobilizationjournal.org H mobilizationjournal.org:80	http://mobilizationjournal.org
10 16	modern language association	0	D mla.org H www.mla.org:80	http://www.mla.org/
10 17	Modern steel construction	0	D modernsteel.com H www.modernsteel.com:80	http://www.modernsteel.com/index.php
10 18	Mohr Siebeck	0	DJ mhr.de DJ mohrsiebeck.com HJ www.mhr.de:80 HJ www.mhr.de:443 HJ www.mohrsiebeck.com:80 HJ www.mohrsiebeck.com:443	https://www.mohrsiebeck.com/en
10 19	Molecular Biology and Evolution	0	D molbioevol.org H www.molbioevol.org:80	http://www.molbioevol.org
10 20	Molecular cancer	0	D molecular-cancer.com H www.molecular-cancer.com:80	http://www.molecular-cancer.com
10 21	Molecular Cell Online	0	D molecule.org H www.molecule.org:80	http://www.molecule.org
10 22	Molecular Cytogenetics	0	D molecularcytogenetics.org H www.molecularcytogenetics.org:80	http://www.molecularcytogenetics.org
10 23	Molecular pain	0	D molecularpain.com H www.molecularpain.com:80	www.molecularpain.com
10 24	Molecular Pharmacology	0	D molpharm.org H www.molpharm.org:80	http://www.molpharm.org
10 25	Molecular Vision Volume 9	0	D www.molvis.org H www.molvis.org:80	http://www.molvis.org
10 26	monash university publishing (update 5/11)	0	D monash.edu H journals.publishing.monash.edu:80	http://journals.publishing.monash.edu
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10 30	Munzinger online	0	D munzinger.de H www.munzinger.de:80	http://www.munzinger.de
10 31	Music Cataloging Bulletin	0	D areditions.com H www.areditions.com:443	https://www.areditions.com/mcb/MCB_List.html
10 32	Music Cataloging Bulletin	1	DJ armusicanthology.com H mcb.armusicanthology.com:443	https://mcb.armusicanthology.com
10 33	Musical America	0	D musicalamerica.com H www.musicalamerica.com:80	http://www.musicalamerica.com
10 34	Myanmar Book Centre	0	D myanmarbook.com H www.myanmarbook.com:80	http://www.myanmarbook.com/
10 35	MyiLibrary	0	DJ myilibrary.com HJ www.myilibrary.com:80 HJ myilibrary.com:80 HJ www.myilibrary.com:443 HJ lib.myilibrary.com:443 HJ lib.myilibrary.com:80	http://lib.myilibrary.com/home.aspx
10 36	N+1	0	D nplusonemag.com H nplusonemag.com:443	https://nplusonemag.com/magazine

10 37	NACLA Digital Archive	0	D opinionarchives.com H search.opinionarchives.com:80	http://search.opinionarchives.com
10 38	nacta journal	0	D nactateachers.org H www.nactateachers.org:80	www.nactateachers.org
10 39	NAIC newsletter	0	D naic.edu H www.naic.edu:80	www.naic.edu/public/about/newslett/aonews.htm
10 40	nano magazine	0	D www.nanomagazine.co.uk H www.nanomagazine.co.uk:80	http://www.nanomagazine.co.uk
10 41	Nanotechnology law & business	0	D nanolabweb.com H pubs.nanolabweb.com:80	http://pubs.nanolabweb.com
10 42	NASA Astrophysics Data System	0	DJ harvard.edu D uchicago.edu DJ u-strasbg.fr DJ caltech.edu DJ usra.edu HJ www.journals.uchicago.edu:80 HJ simbad.u-strasbg.fr:80 HJ nedwww.ipac.caltech.edu:80 HJ www.lpi.usra.edu:80 HJ cfa-www.harvard.edu:80 HJ myads.harvard.edu:80 HJ fulltext.ads.harvard.edu:80 HJ adsdoc.harvard.edu:80 HJ adsabs.harvard.edu:80 H ui.adsabs.harvard.edu:443	https://ui.adsabs.harvard.edu
10 43	National Bureau of Asian Research	0	D nbr.org H www.nbr.org:80	www.nbr.org
10 44	National Bureau of Economic Research	0	D nber.org H www.nber.org:80	http://www.nber.org
10 45	National Council for Science and the Environment	1	D eenews.net H www.eenews.net:80	http://www.eenews.net
10 46	National Council of Family Judges	0	D ncjfcj.org H members.ncjfcj.org:80	http://members.ncjfcj.org/
10 47	National Film Board Canada	0	D nfb.ca H www.nfb.ca:443	https://www.nfb.ca
10 48	National germplasm depository	0	D ars.usda.gov H www.ars.usda.gov:80	http://www.ars.usda.gov
10 49	National index to Chinese newspapers and periodicals	0	DJ cnbksy.com HJ 218.1.116.100:80 H www.cnbksy.com:80	http://www.cnbksy.com
10 50	National Journal	0	HJ racetracker.nationaljournal.com:80 DJ nationaljournal.com HJ www.nationaljournal.com:80 HJ www.nationaljournal.com:443	https://www.nationaljournal.com
10 51	PubMed	2	DJ wkhealth.com DJ linkinghub.elsevier.com DJ dx.doi.org DJ static.pubmed.gov DJ nih.gov HJ ncbi.nlm.nih.gov:80 HJ www.pubmedcentral.nih.gov:443 HJ pubchem.ncbi.nlm.nih.gov:443 HJ ncbi.nlm.nih.gov:443 HJ eutils.ncbi.nlm.nih.gov:443 HJ europepmc.org:443 HJ druginfo.nlm.nih.gov:443 HJ blast.ncbi.nlm.nih.gov:443 HJ www.ncbi.nlm.nih.gov:80 HJ www.ncbi.nlm.nih.gov:443	http://www.ncbi.nlm.nih.gov/entrez/query.fcgi?DB=PubMed
10 52	National research council	0	D nap.edu H www.nap.edu:80	www.nap.edu
10 53	National Research Council of Canada	0	D nrc.ca H www.nrc.ca:80	http://www.nrc.ca
10 54	national wetlands newsletter	0	D www.wetlandsnewsletter.org H www.wetlandsnewsletter.org:80	http://www.wetlandsnewsletter.org/
10 55	Natural Medicines	0	D therapeuticresearch.com H naturalmedicines.therapeuticresearch.com:443	https://naturalmedicines.therapeuticresearch.com/
10 56	Nature	0	DJ nature.com DJ naturesj.com H masterclasses.nature.com:443 H www.naturesj.com:80 H www.nature.com:80	https://masterclasses.nature.com
10 57	Nature conservancy	0	D nature.org H www.nature.org:80	www.nature.org
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10 63	Neurology Magazine	0	D neurology.org H www.neurology.org:80	http://www.neurology.org
10 64	Neuron Online	0	D neuron.org H www.neuron.org:80	http://www.neuron.org
10 65	New Day Digital	0	DJ dma.iriseducation.org DJ dma.newdaydigital.org	http://www.newdaydigital.com/institutions

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10 66	New England Ancestors	0	D newenglandancestors.org H www.newenglandancestors.org:80	http://www.newenglandancestors.org
10 67	New England Journal of Medicine	0	D nejm.org H content.nejm.org:80	http://content.nejm.org/
10 68	New Left Review	0	D newleftreview.org D newleftreview.net H newleftreview.org:80 H www.newleftreview.org:80 H www.newleftreview.net:80	http://newleftreview.org
10 69	New Mexico Historical Review	0	D unm.edu H ejournals.unm.edu:80	http://ejournals.unm.edu/
10 70	New Nunmun	0	D newnonmun.com H www.newnonmun.com:80	http://www.newnonmun.com
10 71	New Palgrave Dictionary of Economics	0	D dictionaryofeconomics.com H www.dictionaryofeconomics.com:80	http://www.dictionaryofeconomics.com/dictionary
10 72	New patterns of hispanic settlement in rural America	1	D usda.gov H www.ers.usda.gov:80	http://www.ers.usda.gov/publications/rdr99/rdr99.pdf
10 73	New ScienceDirect	3	DJ *.els-cdn.com DJ www.elsevier.com DJ sciencedirect.com HJ tableau-admintool.elsevier.com:80 HJ help-admintool.elsevier.com:80 HJ online.tableau.com:80 HJ admintool.elsevier.com:80 HJ linkinghub.elsevier.com:80 HJ sciencedirect.com:80 HJ www.sciencedirect.com:80 HJ sciencedirect.com:443 HJ www.sciencedirect.com:443	https://www.sciencedirect.com
10 74	New scientist	0	D newscientist.com H www.newscientist.com:80	http://www.newscientist.com/home.ns
10 75	New York Academy of Sciences	0	D nyas.org H www.nyas.org:80	http://www.nyas.org
10 76	New York Review of Books (updated 20180725)	0	DJ nyrb.com HJ nyrb.com:80 HJ www.nyrb.com:80 DJ nybooks.info HJ subscribe.nybooks.info:443 DJ nybooks.com HJ nybooks.com:80 HJ shop.nybooks.com:80 HJ www.nybooks.com:80 H www.nybooks.com:443	https://www.nybooks.com
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10 78	New Yorker Digital Archive	0	DJ newyorker.com HJ newyorker.com:80 HJ www.newyorker.com:80 HJ archives.newyorker.com:80 HJ content.archives.newyorker.com:80 HJ www.newyorker.com:443 HJ archives.newyorker.com:443	https://archives.newyorker.com
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10 81	Nichigai (Magazineplus)	0	D nichigai.co.jp H web.nichigai.co.jp:80	http://web.nichigai.co.jp/cgi-bin/astloginip.cgi?W=CNE&DB=00
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10 84	NISC Bioline	0	D biblioline.nisc.com H biblioline.nisc.com:80	http://biblioline.nisc.com
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10 95	Nutrition and Metabolism	0	D nutritionandmetabolism.com H www.nutritionandmetabolism.com: 80	http://www.nutritionandmetabolism.com
10 96	NY History	0	D fenimoreartmuseum.org H www.fenimoreartmuseum.org:80	http://www.fenimoreartmuseum.org
10 97	NY Times Select	1	D nytimes.com H www.select.nytimes.com:80	http://www.select.nytimes.com
10 98	Obesity Research	0	D obesityresearch.org H www.obesityresearch.org:80	http://www.obesityresearch.org
10 99	OCLC	0	DJ oclc.org H newfirstsearch.oclc.org:80	http://newfirstsearch.oclc.org/FSIP
11 00	OECD iLibrary (formerly SourceOECD)	0	HJ www.thecommonwealth-ilibrary.org: :80 HJ www.norden-ilibrary.org:80 HJ www.oecdilibrary.org:80 HJ sourceocde.org:80 HJ data.oecd.org:80 HJ stats.oecd.org:80 HJ www.oecd.org:80 DJ thecommonwealth-ilibrary.org DJ norden-ilibrary.org DJ oecd-ilibrary.org DJ oecdilibrary.org DJ oecd.org HJ www.oecd-ilibrary.org:80	http://www.oecd-ilibrary.org/
11 01	Official Museum Directory	0	D officialmuseumdirectory.com H www.officialmuseumdirectory.com: 80	http://www.officialmuseumdirectory.com
11 02	oil & gas journal	0	D ogj.com H www.ogj.com:80	http://www.ogj.com/index.html
11 03	Okinawa Taimusu kiji sakuin dētabēsu	0	D okinawatimes.co H www.okinawatimes.co.jp:80	http://www.okinawatimes.co.jp/top/
11 04	Okinawa Times Database	0	DJ nikkei.co.jp H t21.nikkei.co.jp:80	http://t21.nikkei.co.jp
11 05	Oldenbourg	0	D oldenbourg-link.com H www.oldenbourg-link.com:80	http://www.oldenbourg-link.com
11 06	OnArchitecture	0	D onarchitecture.com H www.onarchitecture.com:80	http://www.onarchitecture.com/
11 07	OnePetro	0	D onepetro.org H www.onepetro.org:80	www.onepetro.org
11 08	Online Egyptological Bibliography	0	D ox.ac.uk H oeb.griffith.ox.ac.uk:80	http://oeb.griffith.ox.ac.uk/
11 09	OpenEdition (updated 20190305)	0	HJ search-api.openedition.org:80 HJ search.openedition.org:80 HJ auth.openedition.org:80 HJ journals.openedition.org:80 HJ books.openedition.org:80 HJ search-api.openedition.org:443 HJ search.openedition.org:443 HJ auth.openedition.org:443 HJ www.openedition.org:443 HJ journals.openedition.org:443 HJ books.openedition.org:443 DJ openedition.org HJ www.openedition.org:80	http://www.openedition.org
11 10	Open Journal System:	0	D www.math.washington.edu H www.math.washington.edu:80	http://www.math.washington.edu
11 11	Optics and photonics news	0	D www.osa-opn.org H www.osa-opn.org:80	http://www.osa-opn.org/
11 12	Optics Express	0	D opticsexpress.org H www.opticsexpress.org:80	http://www.opticsexpress.org
11 13	Optics InfoBase	0	DJ opticsinfobase.org H ol.osa.org:80 H www.opticsinfobase.org:80	http://www.opticsinfobase.org
11 14	OR/MS today	0	D lionhrtpub.com H www.lionhrtpub.com:80	www.lionhrtpub.com
11 15	orchestral music online	0	D daniels-orchestral.com H www.daniels-orchestral.com:443	https://www.daniels-orchestral.com
11 16	Original Sources	0	DJ originalsources.com H www.originalsources.com:80	http://www.originalsources.com/
11 17	Oriprobe Information Services	0	DJ oriprobe.com HJ 43.250.238.143:80 H www.oriprobe.com:80	http://www.oriprobe.com/cpc.html
11 18	Orphanet journal of rare diseases	0	D ojrd.com H www.ojrd.com:80	http://www.ojrd.com/
11 19	OSA Electronic Publications	0	D epubns.osa.org H epubns.osa.org:80	http://epubs.osa.org
11 20	OSA Publishing	0	D opticsinfobase.org D osapublishing.org H www.osapublishing.org:80 H www.opticsinfobase.org:80	www.osapublishing.org
11 21	OSH Update + Fire	0	DJ oshupdate.com H www.oshupdate.com:80	http://www.oshupdate.com/

11 22	Other Voices Volume 2	0	D www.othervoices.org H www.othervoices.org:80	http://www.othervoices.org
11 23	Otzar haHochma	0	DJ otzar.org H tablet.otzar.org:443	https://tablet.otzar.org
11 24	Overseas development institute	0	D odi.org.uk H www.odi.org.uk:80	www.odi.org.uk
11 25	Ovid HTTPS (updated 20180807)	0	DJ visiblebody.com DJ wkhealth.com DJ ovid.com DJ wolterskluwer.com DJ jbisumari.org DJ anatomy.tv HJ anatomy.tv:80 HJ nursing.ovid.com:80 HJ ovid.visiblebody.com:80 HJ assets.ovid.com:80 HJ content.wkhealth.com:80 HJ access.ovid.com:443 HJ access.ovid.com:80 HJ pt.wkhealth.com:80 HJ login.wolterskluwer.com:80 HJ sumari-prod-1.srv.jbisumari.org:80 HJ auth.jbisumari.org:80 HJ ovidsp.uk.ovid.com:80 HJ ovidsp.tx.ovid.com:80 HJ insights.ovid.com:443 HJ insights.ovid.com:80 HJ gateway.ovid.com:443 HJ gateway.ovid.com:80 HJ oce.ovid.com:80 HJ oce.ovid.com:443 HJ ovidsp.ovid.com:443 HJ ovidsp.ovid.com:80	http://ovidsp.ovid.com/autologin.html
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11 28	Oxford Biblical Studies Online (Trial)	0	DJ oxfordbiblicalstudies.com H www.oxfordbiblicalstudies.com:80	http://www.oxfordbiblicalstudies.com/
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11 30	Oxford classical dictionary	0	DJ oxfordre.com H classics.oxfordre.com:80	http://classics.oxfordre.com
11 31	Oxford Dictionaries	2	DJ oxforddictionaries.com DJ partner.googleadservices.com DJ www.google-analytics.com DJ www.googletagservices.com DJ ouptag.scholarlyiq.com H premium.oxforddictionaries.com:443	https://premium.oxforddictionaries.com
11 32	Oxford Dictionary of Byzantium	0	D oxford-byzantium.com H www.oxford-byzantium.com:80	www.oxford-byzantium.com
11 33	Oxford Dictionary of National Biography	0	HJ oxforddnb.com:80 HJ www.oxforddnb.com:80 HJ oxforddnb.com:443 HJ www.oxforddnb.com:443	https://www.oxforddnb.com
11 34	Oxford Dictionary of the Middle Ages	0	D oxford-middleagesdictionary.com H www.oxford-middleagesdictionary.com:80	http://www.oxford-middleagesdictionary.com
11 35	Oxford dictionary of the Renaissance	0	D oxford-rennaissance.com H www.oxford-rennaissance.com:80	http://www.oxford-rennaissance.com
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11 37	Oxford Handbooks Online	0	D oxfordhandbooks.com H www.oxfordhandbooks.com:80	http://www.oxfordhandbooks.com
11 38	Oxford history of western music	0	D oxfordwesternmusic.com H www.oxfordwesternmusic.com:80	www.oxfordwesternmusic.com
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11 56	Paper of Record	0	D paperofrecord.com H ola.paperofrecord.com:80 H cu.ola.paperofrecord.com:80	http://cu.ola.paperofrecord.com
11 57	Papers of George Washington	0	D virginia.edu H pfe.rotunda.upress.virginia.edu:80 H rotunda.upress.virginia.edu:80	http://pfe.rotunda.upress.virginia.edu
11 58	Papers of the War Department	0	D wardepartmentpapers.org H wardepartmentpapers.org:80	wardepartmentpapers.org
11 59	ParaText	0	DJ paratext.com HJ www.paratext.com:80 H www.paratext.com:443	https://www.paratext.com
11 60	Particle and fibre toxicology	0	D particleandfibretoxicology.com H www.particleandfibretoxicology.com:80	http://www.particleandfibretoxicology.com/
11 61	Passport (Euromonitor International)	1	DJ euromonitor.com DJ portal.euromonitor.com HJ portal.euromonitor.com:80 HJ www.portal.euromonitor.com:80 H www.portal.euromonitor.com:443	https://www.portal.euromonitor.com
11 62	past masters intalex	0	DJ nlx.com H pm.nlx.com:80	http://pm.nlx.com/
11 63	Patrologiae Graecae	1	DJ purl.org DJ newadvent.org DJ reltech.org HJ 98.129.95.188:80 H phoenix.reltech.org:80	http://phoenix.reltech.org/Ebind/docs/Migne/Migne.html
11 64	Peanut Science	0	D peanutsience.com H www.peanutsience.com:80	http://www.peanutsience.com
11 65	Peeters Online Journals	0	D peeters-leuven.be H poj.peeters-leuven.be:80	http://poj.peeters-leuven.be

11 66	Penn Press	0	DJ pennpress.org H mss.pennpress.org:80	http://mss.pennpress.org
11 67	PEP Web	0	D pep-web.org H www.pep-web.org:80	http://www.pep-web.org
11 68	perception - pion	0	D www.perceptionweb.com H www.perceptionweb.com:80	http://www.perceptionweb.com/
11 69	Pharmacognosy research	0	D phcogres.com H www.phcogres.com:80	http://www.phcogres.com
11 70	Pharmacological Reviews	0	D pharmrev.org H www.pharmrev.org:80	http://www.pharmrev.org
11 71	Phase equilibria diagrams	0	D ceramics.org H phase.ceramics.org:80 H phaseonline.ceramics.org:443	http://phase.ceramics.org/Publicstore/IPUser.aspx
11 72	Philosophical topics	0	D pdcnet.org D philosophyonline.org H www.philosophyonline.org:80	www.philosophyonline.org
11 73	philpapers	0	D philpapers.org H philpapers.org:80	http://philpapers.org/
11 74	Physica Scripta	0	D physica.org H www.physica.org:80	http://www.physica.org
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11 76	Physics today	0	D physictoday.org H www.physictoday.org:80	www.physictoday.org
11 77	Physiology Online	0	D physiology.org H physiologyonline.physiology.org:80	http://physiologyonline.physiology.org
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11 79	Pidgeon Digital	0	DJ pidgeondigital.com H www.pidgeondigital.com:443	https://www.pidgeondigital.com
11 80	pku law	0	D pkulaw.cn H www.pkulaw.cn:80	http://www.pkulaw.cn
11 81	pku law english	0	D pkulaw.com H en.pkulaw.com:80	http://en.pkulaw.com/
11 82	Plant Health Progress	0	D planthealthprogress.org H www.planthealthprogress.org:80	http://www.planthealthprogress.org
11 83	Plant information online	0	D www.plantinfo.umn.edu H www.plantinfo.umn.edu:80	http://www.plantinfo.umn.edu/
11 84	Plant Management Network	0	DJ plantmanagementnetwork.org DJ scisoc.org HJ identityserver.scisoc.org:80 HJ identityserver.scisoc.org:443 HJ www.plantmanagementnetwork.org:80 HJ www.plantmanagementnetwork.org:443	https://www.plantmanagementnetwork.org/pub/trial/pdmr/
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11 87	PLOS clinical trials	0	D plosclinicaltrials.org H www.plosclinicaltrials.org:80	http://www.plosclinicaltrials.org
11 88	PLOS computational biology	0	D ploscompbiol.org H www.ploscompbiol.org:80	http://www.ploscompbiol.org
11 89	PLOS genetics	0	D plogenetics.org H www.plogenetics.org:80	http://www.plogenetics.org/
11 90	PLOS medicine	0	D plosmedicine.org H www.plosmedicine.org:80	http://www.plosmedicine.org/
11 91	PLOS neglected tropical diseases	0	D plosntds.org H www.plosntds.org:80	http://www.plosntds.org
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11 93	PLOS pathogens	0	D plospathogens.org H www.plospathogens.org:80	http://www.plospathogens.org
11 94	Plumbs Veterinary Drugs	0	DJ plumbsveterinarydrugs.com H www.plumbsveterinarydrugs.com:443	https://www.plumbsveterinarydrugs.com
11 95	Plunkett research online	0	D plunketteresearchonline.com H www.plunketteresearchonline.com:80	http://www.plunketteresearchonline.com
11 96	PMLA	0	D www.mlajournals.org H www.mlajournals.org:80	http://www.mlajournals.org/loi/pmla
11 97	Poblacion y salud en mesoamerica	0	D ccp.ucr.ac.cr H ccp.ucr.ac.cr:80	http://ccp.ucr.ac.cr/revista/index.htm
11 98	Poetry Bay 2004	0	D www.poetrybay.com H www.poetrybay.com:80	http://www.poetrybay.com
11 99	Polibotanica	0	D www.herbario.encb.ipn.mx H herbario.encb.ipn.mx:80	herbario.encb.ipn.mx/pb/eng/frame_en.htm
12 00	PolicyMap	0	DJ policymap.com HJ cornell.policymap.com:80 H cornell.policymap.com:443	https://cornell.policymap.com
12 01	Polling the Nations	0	D orspub.com H poll.orspub.com:80	http://poll.orspub.com
12 02	Popline	0	D db.jhuccp.org H db.jhuccp.org:80	http://db.jhuccp.org/popinform/basic.html
12	Population health metrics	0	D pophealthmetrics.com	http://www.pophealthmetrics.com/

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12 04	portico	0	D www.portico.org H www.portico.org:80	http://www.portico.org/
12 05	Portland Press	0	D portlandpress.com H www.portlandpress.com:80	http://www.portlandpress.com
12 06	Postgraduate Medical Journal	0	D postgradmedj.com H www.postgradmedj.com:80	http://www.postgradmedj.com
12 07	Poultry Science	0	D ps.fass.org H ps.fass.org:80	http://ps.fass.org
12 08	Poultry Science Association	0	D poultryscience.org H www.poultryscience.org:80	http://www.poultryscience.org
12 09	powder diffraction	0	D powderdiffractionjournal.com H powderdiffractionjournal.com:80	http://powderdiffractionjournal.com/
12 10	Practising Law Institute Discover Plus	0	D pli.edu H discover.pli.edu:80	http://discover.pli.edu
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12 13	Primary Research Group	0	DJ primaryresearch.com H primaryresearch.com:443	https://primaryresearch.com
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12 17	Productscan	0	DJ datamonitor.com HJ www-datamonitor-com:80 HJ www.datamonitor.com:80 DJ productscan.com HJ www.productscan.com:80	http://www.productscan.com/index.cfm?nid=3
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12 21	ProQuest statistical insight	0	D lnstatistical.com H www.lnstatistical.com:80	http://www.lnstatistical.com
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12 24	Psychosomatic medicine	0	D psychosomaticmedicine.org H www.psychosomaticmedicine.org:80	www.psychosomaticmedicine.org
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12 30	Quantum information & computation	0	D rintonpress.com H www.rintonpress.com:80	http://www.rintonpress.com/journals/qiconline.html
12 31	quarterly journal of political science	0	D qjps.com H www.qjps.com:80	http://www.qjps.com
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12 42	religious and theological abstracts	0	D rtabstracts.org H rtabstracts.org:80	http://rtabstracts.org/search/
12 43	Renaissance quarterly	0	D rsa.org H www.rsa.org:80	www.rsa.org
12 44	Report of the Native American sacred lands forum	0	D sacredland.org H www.sacredland.org:80	www.sacredland.org
12 45	Reproductive Biology and Endocrinology	0	D www.rbej.com H www.rbej.com:80	http://www.rbej.com/articles/browse.asp
12	Reproductive health	0	D reproductive-health-journal.com	www.reproductive-health-journal.com

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12 47	Research design connections	0	D researchdesignconnections.com H www.researchdesignconnections.com:80	www.researchdesignconnections.com
12 48	Researcher ID	1	DJ researcherid.com H www.researcherid.com:80	http://www.researcherid.com
12 49	Respiratory research	0	D respiratory-research.com H www.respiratory-research.com:80	www.respiratory-research.com
12 50	Responsa project	0	D responsa.co.il H www.responsa.co.il:80	http://www.responsa.co.il/loginform.aspx
12 51	Retrovirology	0	D www.retrovirology.com H www.retrovirology.com:80	http://www.retrovirology.com/
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12 55	Revista Iberoamericana	0	D pitt.edu H revista-iberoamericana.pitt.edu:80	http://revista-iberoamericana.pitt.edu
12 56	Revista sur	0	D 50.97.112.155 H 50.97.112.155:722	http://50.97.112.155:722/Home.php
12 57	Revista/review interamericana	0	D www.sg.inter.edu H www.sg.inter.edu:80	http://www.sg.inter.edu/revista-ciscla/index.html
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12 59	Revue d'histoire et de philosophie religieuses	0	D rhpr.net H www.rhpr.net:80	www.rhpr.net
12 60	RIA Checkpoint	0	DJ riag.com H checkpoint.riag.com:80	http://checkpoint.riag.com/login?ploc=COLLUNTY
12 61	Rikai	0	D www.rikai.com H www.rikai.com:80	http://www.rikai.com/perl/Home.pl
12 62	RILM Music Encyclopedias	0	DJ rilm.org H rme.rilm.org:443	https://rme.rilm.org
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12 65	RISS International	0	D riss.kr H intl.riss.kr:80 H intl.riss4u.net:80	http://intl.riss.kr
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12 72	Rocky Mountain Mathematics Consortium	0	D asu.edu H rmmc.eas.asu.edu:80	http://rmmc.eas.asu.edu/
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12 85	Rutgers	0	D rutgers.edu H www.physics.rutgers.edu:80	www.physics.rutgers.edu
12 86	s-PAC	0	D spac.adsa.org H spac.adsa.org:80	http://spac.adsa.org
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14 09	Transportation research record	0	D trb.org D trb.metapress.com H trb.metapress.com:80 H pubindex.trb.org:80	http://trb.metapress.com
14 10	trends in the hotel industry	0	H www.hotelschool.cornell.edu:80	http://www.hotelschool.cornell.edu
14 11	Triangle Journals	0	D triangle.co.uk H www.triangle.co.uk:80	http://www.triangle.co.uk
14 12	Tribes and tribals	0	D www.krepublishers.com H www.krepublishers.com:80	http://www.krepublishers.com
14 13	Trismegistos	0	DJ trismegistos.org H www.trismegistos.org:443	https://www.trismegistos.org
14 14	Trouble With Wilderness (spring 2008 blackboard)	0	D williamcronon.net H www.williamcronon.net:80	http://www.williamcronon.net/writing/Trouble_with_Wilderness_Main.html
14 15	Tugg Streaming	0	DJ tugg.com H cornell.tugg.com:80 H cornell.tugg.com:443	https://cornell.tugg.com
14 16	Turfgrass Information File	0	D turf.lib.msu.edu H turf.lib.msu.edu:80	http://turf.lib.msu.edu
14 17	Turpin Distribution and Fulfillment	0	D turpin-distribution.com H www.turpin-distribution.com:80	http://www.turpin-distribution.com
14 18	UC Irvine	0	D www.ics.uci.edu H www.ics.uci.edu:80	http://www.ics.uci.edu/
14 19	UCLA Graduate School of Education & Information Studies	0	D gseis.ucla.edu H www.gseis.ucla.edu:80	http://www.gseis.ucla.edu
14 20	ULI Development case studies	0	D uli.org H www.casestudies.uli.org:80	http://www.casestudies.uli.org
14 21	UMI (Proquest)	0	D umi.com H www.umi.com:80	http://www.umi.com
14 22	UN Statistics	0	D un.org H comtrade.un.org:80 H unstats.un.org:80	http://unstats.un.org
14 23	United Kingdom Serials Group	0	D metapress.com H uksg.metapress.com:80	http://uksg.metapress.com/
14 24	United Nations	0	D un.org H www.un.org:80	http://www.un.org
14 25	United Nations University	0	D unu.edu H www.unu.edu:80	http://www.unu.edu/
14 26	Universidad Nacional de Lujan	0	D scielo.org.ar H www.scielo.org.ar:80	www.scielo.org.ar
14 27	university of arizona institutional repository	0	D arizona.edu H digitalcommons.library.arizona.edu:80 H uair.arizona.edu:443	http://digitalcommons.library.arizona.edu/
14 28	University of California Press	1	DJ ucpresjournals.com DJ ucpres.edu HJ lalvc.ucpress.edu:80 HJ socdev.ucpress.edu:80 HJ rac.ucpress.edu:80 HJ nr.ucpress.edu:80 HJ ncm.ucpress.edu:80 HJ jm.ucpress.edu:80 HJ jams.ucpress.edu:80 HJ rh.ucpress.edu:80 HJ ncl.ucpress.edu:80 HJ rep.ucpress.edu:80 HJ mp.ucpress.edu:80 HJ tph.ucpress.edu:80 HJ www.ucpresjournals.com:80 HJ hsns.ucpress.edu:80 HJ gcsf.ucpress.edu:80 HJ fq.ucpress.edu:80 HJ fmh.ucpress.edu:80 HJ nclr.ucpress.edu:80 HJ fsr.ucpress.edu:80 HJ irqr.ucpress.edu:80 HJ dcqr.ucpress.edu:80 HJ ca.ucpress.edu:80 HJ cmr.ucpress.edu:80 HJ abt.ucpress.edu:80 HJ scq.ucpress.edu:80 HJ phr.ucpress.edu:80 HJ msem.ucpress.edu:80 HJ vs.ucpress.edu:80	http://www.ucpress.edu/journals.php

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14 29	University of Illinois at Urbana Champaign Library Gateway	0	D library.uiuc.edu H www.library.uiuc.edu:80	http://www.library.uiuc.edu
14 30	University of Illinois Press	0	D illinois.edu H jegp.press.illinois.edu:80 H am.press.illinois.edu:80 H mmi.press.illinois.edu:80	http://jeggp.press.illinois.edu/jegpindex.html
14 31	University of Iowa Research	0	D uiowa.edu H www.ir.uiowa.edu:80	www.ir.uiowa.edu
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14 36	university of toronto	0	D utpjournals.press D metapress.com H www.utpjournals.press:80 H utpjournals.press:80 H utpjournals.metapress.com:80	http://www.utpjournals.press
14 37	University Press Scholarship Online (updated 20190322)	0	DJ universitypressscholarship.com DJ www.universitypressscholarship.com DJ universitypressscholarship.com HJ www.oxfordscholarship.com:443 HJ www.oxfordscholarship.com:80 HJ www.yale.universitypressscholarship.com:443 HJ www.stanford.universitypressscholarship.com:443 HJ www.princeton.universitypressscholarship.com:443 HJ www.policypress.universitypressscholarship.com:443 HJ www.nyu.universitypressscholarship.com:443 HJ www.northcarolina.universitypressscholarship.com:443 HJ www.mitpress.universitypressscholarship.com:443 HJ www.mississippi.universitypressscholarship.com:443 HJ www.minnesota.universitypressscholarship.com:443 HJ www.manchester.universitypressscholarship.com:443 HJ www.liverpool.universitypressscholarship.com:443 HJ www.kentucky.universitypressscholarship.com:443 HJ www.illinois.universitypressscholarship.com:443 HJ www.hongkong.universitypressscholarship.com:443 HJ www.hawaii.universitypressscholarship.com:443 HJ www.fordham.universitypressscholarship.com:443 HJ www.florida.universitypressscholarship.com:443 HJ www.edinburgh.universitypressscholarship.com:443 HJ www.cornell.universitypressscholarship.com:443 HJ www.columbia.universitypressscholarship.com:443 HJ www.chicago.universitypressscholarship.com:443 HJ www.california.universitypressscholarship.com:443 HJ www.cairo.universitypressscholarship.com:443 HJ www.britishacademy.universitypressscholarship.com:443 HJ yale.universitypressscholarship.com:443 HJ universitypressscholarship.com:443 HJ stanford.universitypressscholarship.com:443 HJ princeton.universitypressscholarship.com:443 HJ policypress.universitypressscholarship.com:443 HJ nyu.universitypressscholarship.com:443 HJ northcarolina.universitypressscholarship.com:443 HJ mitpress.universitypressscholarship.com:443 HJ mississippi.universitypressscholarship.com:443 HJ minnesota.universitypressscholarship.com:443 HJ manchester.universitypressscholarship.com:443 HJ liverpool.universitypressscholarship.com:443	https://www.universitypressscholarship.com/

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14 38	University Publishing Online	0	DJ universitypublishingonline.org H universitypublishingonline.org:80	universitypublishingonline.org
14 39	Uniworld	0	D uniworld.com H uniworldonline.com:443	https://uniworldonline.com/
14 40	UNWTO eLibrary	0	DJ e-unwto.org H www.e-unwto.org:443	https://www.e-unwto.org/
14 41	Update Software	0	D updateusa.com D update-software.com D update.co.uk H www.updateusa.com:80 H HOST8.update.co.uk:80 H www.update-software.com:80	http://www.updateusa.com
14 42	USAIM	0	D esaim-ps.org H www.esaim-ps.org:80	www.esaim-ps.org
14 43	Vadose Zone Journal	0	D www.vadosezonejournal.org H www.vadosezonejournal.org:80	http://www.vadosezonejournal.org/
14 44	Vanderbilt TV news archive	0	DJ vanderbilt.edu HJ classic.tvnews.vanderbilt.edu:443 HJ www.tvnews.vanderbilt.edu:443 HJ classic.tvnews.vanderbilt.edu:80 HJ www.tvnews.vanderbilt.edu:80 HJ tvnews.vanderbilt.edu:80	http://tvnews.vanderbilt.edu
14 45	Vault online career library	0	D vault.com H careerlib.vault.com:80	http://careerlib.vault.com/cb/careerlib/careerlib_main.jsp?parrefer=738
14 46	Very Short Introductions	0	D veryshortintroductions.com H www.veryshortintroductions.com:80	http://www.veryshortintroductions.com
14 47	Veterinary Pathology	0	D vetpathology.org H www.vetpathology.org:80	http://www.vetpathology.org
14 48	Veterinary research	0	D vetres.org H www.vetres.org:80	www.vetres.org
14 49	Veterinary Research	0	D veterinaryresearch.org H www.veterinaryresearch.org:80	http://www.veterinaryresearch.org/
14 50	Vetmed resource	0	D vetmedresource.com H www.vetmedresource.com:80	www.vetmedresource.com
14 51	Virology journal	0	D www.virologyj.com H www.virologyj.com:80	http://www.virologyj.com
14 52	Virtual Explorer	0	D virtualexplorer.com.au H virtualexplorer.com.au:80	http://virtualexplorer.com.au
14 53	Virtual Journal of Nanoscale Science and Technology	0	D vjnano.org H www.vjnano.org:80	http://www.vjnano.org
14 54	Visual History Archive	0	D usc.edu H vha.usc.edu:80	http://vha.usc.edu
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14 56	Voyages	0	D slavevoyages.org H www.slavevoyages.org:80	http://www.slavevoyages.org
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14 58	Wageningen Academic	0	D wageningenacademic.metapress. com H wageningenacademic.metapress. com:80	http://wageningenacademic.metapress.com/
14 59	Wall street journal online	0	D online.wsj.com H www.online.wsj.com:80	www.online.wsj.com
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14 61	Walter de Gruyter 2	0	D www.reference-global.com H www.reference-global.com:80	http://www.reference-global.com/
14 62	Wanfang Data (Chinese)	0	DJ wanfangdata.com.cn H c.g.wanfangdata.com.cn:80	http://c.g.wanfangdata.com.cn
14 63	WDI online [electronic resource] / the World Bank Group.	0	D worldbank.org H devdata.worldbank.org:80	http://devdata.worldbank.org
14 64	Web of Knowledge (updated 20190912)	11	DJ dl3iz8tnp4bmj.cloudfront.net DJ app.webofknowledge.com HJ app.webofknowledge.com:443 HJ app.webofknowledge.com:80 DJ webofscience.com DJ isiwebofknowledge.com DJ isiknowledge.com HJ www.webofscience.com:80 HJ www.researchid.com:80 HJ www.isiknowledge.com:80 HJ www.highlycited.com:80 HJ ws.isiknowledge.com:80 HJ webofscience.com:80 HJ wcs.webofknowledge.com:80 HJ usagereports.webofscience.com: 80	http://www.webofknowledge.com

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14 66	Westlaw Campus	0	DJ westlaw.com H nextcanada.westlaw.com:443 H campus.westlaw.com:80 H www.westlaw.com:80	https://nextcanada.westlaw.com
14 67	Wetlands	0	D wetlands.org H www.wetlands.org:80	http://www.wetlands.org
14 68	Wharton Research Data Services (WRDS) (updated 20191009)	0	DJ wharton.upenn.edu HJ wrds.wharton.upenn.edu:80 HJ wrds.wharton.upenn.edu:443 HJ wrds-sol2.wharton.upenn.edu:443 HJ wrds-sol1.wharton.upenn.edu:443 HJ wrds-www.wharton.upenn.edu:443 HJ wrds-web.wharton.upenn.edu:443	https://wrds-web.wharton.upenn.edu/wrds/
14 69	WHATT Database	0	D whatt.net H www.whatt.net:80	http://www.whatt.net
14 70	Whitston Publishing	0	D whitston.com H www.whitston.com:80	http://www.whitston.com
14 71	Wildlife Information Network	0	DJ twycrosszoo.org DJ wildlifeinformation.org H cse.google.com:443 HJ wildpro.twycrosszoo.org:80 H www.wildlifeinformation.org:80	http://www.wildlifeinformation.org
14 72	Wiley Digital Archives	0	DJ wileydigitalarchives.com HJ api.wileydigitalarchives.com:443 HJ app.wileydigitalarchives.com:443	https://app.wileydigitalarchives.com/
14 73	Wiley Online Library	0	DJ wileyonlinelibrary.com DJ wileyopenaccess.com DJ esajournals.org DJ wiley.com HJ zslpublications.onlinelibrary.wiley.com:443 HJ www3.interscience.wiley.com:443 HJ www.wileyopenaccess.com:443 HJ www.wileyonlinelibrary.com:443 HJ www.wiley.com:443 HJ www.onlinelibrary.wiley.com:443 HJ www.mrw.interscience.wiley.com:443 HJ www.interscience.wiley.com:443 HJ www.esajournals.org:443 HJ wires.wiley.com:443 HJ wileyonlinelibrary.com:443 HJ sttipubs.onlinelibrary.wiley.com:443 HJ stemcellsjournalsonlinelibrary.wiley.com:443 HJ spssi.onlinelibrary.wiley.com:443 HJ setac.onlinelibrary.wiley.com:443 HJ secure.onlinelibrary.wiley.com:443 HJ rss.onlinelibrary.wiley.com:443 HJ rmets.onlinelibrary.wiley.com:443 HJ physoc.onlinelibrary.wiley.com:443 HJ obgyn.onlinelibrary.wiley.com:443 HJ nyaspubs.onlinelibrary.wiley.com:443 HJ npf.onlinelibrary.wiley.com:443 HJ mrw.interscience.wiley.com:443 HJ londmathsoc.onlinelibrary.wiley.com:443 HJ jlb.onlinelibrary.wiley.com:443 HJ iubmb.onlinelibrary.wiley.com:443 HJ interscience.wiley.com:443 HJ ila.onlinelibrary.wiley.com:443 HJ febs.onlinelibrary.wiley.com:443 HJ esajournals.onlinelibrary.wiley.com:443 HJ efsa.onlinelibrary.wiley.com:443 HJ doi.wiley.com:443 HJ currentprotocols.onlinelibrary.wiley.com:443 HJ bspubs.onlinelibrary.wiley.com:443 HJ besjournals.onlinelibrary.wiley.com:443 HJ aslopubs.onlinelibrary.wiley.com:443 HJ ascpt.onlinelibrary.wiley.com:443 HJ aps.onlinelibrary.wiley.com:443 HJ api.wiley.com:443 HJ anzjsurg.onlinelibrary.wiley.com:443	https://onlinelibrary.wiley.com

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14 93	World SciNet	0	D worldscinet.com H www.worldscinet.com:80	http://www.worldscinet.com
14 94	World Shakespeare Bibliography Online	0	D worldshakesbib.org H www.worldshakesbib.org:80	http://www.worldshakesbib.org/
14 95	WorldTradeLaw.net (updated 20160603)	0	DJ worldtradelaw.net HJ worldtradelaw.net:80 HJ www.worldtradelaw.net:80	http://www.worldtradelaw.net
14 96	www.mediciv.tv	0	DJ mediciv.tv HJ educiv.mediciv.tv:80	http://educiv.mediciv.tv/
14 97	X-Refer Plus 100	0	D xreferplus.com H www.xreferplus.com:80	http://www.xreferplus.com/
14 98	Xipolis	0	D lexika.tanto.de D grp.xipolis.net D xipolis.net H lexika.tanto.de:80 H www.xipolis.net:80 H grp.xipolis.net:80 H xipolis.net:80	http://grp.xipolis.net/
14 99	Yale university	0	D yale.edu H www.yale.edu:80	www.yale.edu/
15 00	Yomidas Rekishikan	0	D database.yomiuri.co.jp H database.yomiuri.co.jp:443	https://database.yomiuri.co.jp/rekishikan/
15 01	Zasshi kiji sakuin shūsei dētabēsu	0	D zassaku-plus.com H zassaku-plus.com:80	http://zassaku-plus.com/
15 02	Zeitschrift für Naturforschung	0	D znaturforsch.com H www.znaturforsch.com:80	www.znaturforsch.com
15 03	Zeitschrift fur Arbeits- und Organisationspsychologie	0	DJ hogrefe.com H econtent.hogrefe.com:80	http://econtent.hogrefe.com/loi/za
15 04	Zhongguo wenhua dageming wenku	0	D ccrd.usc.cuhk.edu.hk H ccrd.usc.cuhk.edu.hk:80	http://ccrd.usc.cuhk.edu.hk
15 05	Zhonghua Ancient Books	0	DJ ancientbooks.cn H publish.ancientbooks.cn:80	http://publish.ancientbooks.cn
15 06	ZMATH Zentralblatt MATH	0	D zmath.org D zentralblatt-math.org H www.zentralblatt-math.org:80 H www.zmath.org:443 H zmath.library.cornell.edu:80	http://www.zentralblatt-math.org/zmath/en/

Login ports

Interface	SSL	Port
132.236.27.125	N	80
132.236.27.125	Y	443

Hosts

Project Documents

- Assumptions & Constraints Log
- Budget
- Change Log
- Communications Log
- Contacts List
- Proposals & Agreements
- Requirements
- Risk Register
- Staff Assignments & Responsibilities
- Stakeholder Register
- Status Reports
- Transition Plan

Assumptions & Constraints Log

Assumption/Constraint	Why made?	Responsible Party	Update Due	Actions	Status	Comments
Classic Catalog will go away upon implementation of FOLIO	No choice	Holly	n/a	Perhaps shutdown Classic Catalog prior to implementation to see who comments?	Classic Catalog was made unavailable to all but CUL staff as of 2018.	
Current Discovery & Access front end will remain for FOLIO	D&A front end is new and excellent as is	Holly	n/a	Need to work with D&A team to insure that integration with OLE will be seamless.	Mary Beth has joined CUL FOLIO Implementation Team as D&A rep.	
FOLIO must provide key functions as defined by CUL	Not having key functions will be a show stopper	CUL FOLIO Implementation Team members are responsible for their areas of expertise		Gap Analysis was conducted in mid-2018. Testing as FOLIO releases come out will prove this.	Holly is working with PC members to do another Gap Analysis now that much of FOLIO has been developed.	
Release of FOLIO we are implementing must be available for testing at least six months prior to our implementation	Minimum test time according to other ILS implementers and our own team	FOLIO Community		We are still waiting to find out if all features we need will be available by January 2020. We will be testing features as they are released, but full system testing is still needed.	A Capacity Plan has been developed with estimates what the FOLIO Community will be able to complete in 2019. Holly is using this plan to determine how much of what Cornell needs will be ready for January 2020.	
Staff members within Finance, Public Services, Technical Services, Collection Development, and Information Technology will have enough time allotted to testing	This project will not succeed without their involvement	CUL FOLIO Implementation Team members responsible for working with department managers and AUL to insure time is available		We are starting the testing far enough in advance that time should not be an issue.		
We are not going to replicate Voyage functionality or workflows	Not realistic to expect FOLIO to be the same as	CUL FOLIO Implementation Team members are responsible for workflows in their areas of expertise		Work with the individuals in each area to define the current workflow and document how FOLIO will impact the workflow.	Holly is starting up a FOLIO Implementation Group that will address workflows, among other things. Cornell will be participating in this group.	

Budget

See *Cost Management Plan* or *Cost Baseline*

- Endowed Account: L853735
- Statutory Account: L833735

Current Budget Projections **DRAFT!**

Original Budget

Original Budget

Unit	Description	Nov '15- Jun '16	July '16- Jun '17	July '17- Jun '18	July '18- Jun '19	Total
All	Travel/training: 25 trips/yr@\$2000/trip	\$33,333	\$50,000	\$25,000	\$0	\$108,333
All	OLE Partnership	\$78,334	\$117,500	\$117,500	\$117,500	\$430,834
All	Voyager Maintenance/License (change from existing)	\$0	\$0	-\$220,000	-\$220,000	-\$440,000
CUL-IT	Backfill 40% of Holly Mistlebauer as Project Manager	Confidential	Confidential	Confidential	Confidential	Confidential
CUL-IT	Backfill 50% of Frances Webb for OLE integration development	Confidential	Confidential	Confidential	Confidential	Confidential
CUL-IT	Fund 50% of DevOps position for IT ops (unfunded half of existing DevOps position)	Confidential	Confidential	Confidential	Confidential	Confidential
CUL-IT	Net cost for OLE VM servers	\$20,000	\$30,000	\$30,000	\$15,000	\$95,000
LTS	1.0 FTE Payband D for one year in Acquisitions & E-Resource Licensing Services	Confidential	Confidential	Confidential	Confidential	Confidential
LTS	0.51 FTE Payband E for six months on the LTS documentation team, May 2017 – October 2017	Confidential	Confidential	Confidential	Confidential	Confidential
Publics Svces	Circulation staff backfill	\$8,500	\$35,500	\$0	\$0	\$44,000
Totals		\$246,448	\$392,648	\$149,949	-\$17,481	\$771,565

Change Log

See [Change Management Plan](#)

Category	Impact	Description of Change	Submitted By	Date	Status	Disposition	Comments
Schedule	Increase	Change the go-live date from July 1, 2020 to July 1, 2021	Debra Howell	11/2019	Completed	Approved	Change due to FOLIO Development delays
Budget	Modification	Utilize contingency funds to pay for development of 2 go-live showstoppers	Debra Howell	12/15 /2020	Completed	Approved	\$64,980 – \$92,340 (time and materials)
Budget	Modification	Extend staff member Liz Kluz from April 9 – June 30 to complete ERM work	Debra Howell	12/15 /2020	In Process	Approved	\$14,000
Schedule and Budget	Modification	.3 FTE will be extended through FY22 will be to finish reporting	Debra Howell	04/02 /2021	In Process	Approved	\$25,402.15
Budget	Modification	Hire Atlas Systems to write plug-in for Ares and FOLIO	Debra Howell	05/14 /2021	In-Process	Approved	\$8970
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	
Scope? Schedule? Budget? Quality?	Increase? Decrease? Modification?				Submitted? In-Process? Completed?	Approved? Deferred? Rejected?	

Communications Log

See [Communication Management Plan](#)

Log restarted in 2019 (see [old Communications Log](#))

Audience	Communication	Vehicle of Communication	Date Delivered	Available Materials
All CUL Staff	FOLIO Friday	Face-to-Face	11/10/2015	
All CUL Staff	FOLIO Friday (reporting - led by Sharon)	Face-to-Face and Zoom	03/15/2019	
All CUL Staff	FOLIO Implementation Team March Newsletter	Email	3/22/2019	
All CUL Staff	FOLIO Friday	Face-to-Face and Zoom	4/12/2019	https://vod.video.cornell.edu/media/Debra+Howell%27s+Zoom+Meeting/1_o44sy4cn
All CUL Staff	FOLIO Implementation Team April Newsletter	Email	4/26/2019	
All CUL Staff	May FOLIO Friday	Face-to-Face and Zoom	5/10/2019	https://vod.video.cornell.edu/media/FOLIO+Friday/1_yu1pwnph Slides: May 2019 FOLIO Friday.pdf
All CUL Staff	June-July FOLIO Implementation Newsletter	Email	7/1/2019	
All CUL Staff	August FOLIO Friday	Face-to-Face and Zoom	8/16/2019	
All CUL Staff	August FOLIO Implementation Newsletter	Email	8/23/2019	
All CUL Staff	October FOLIO Friday	Face-to-Face and Zoom	10/25/2019	
All CUL Staff	Fall FOLIO Implementation Newsletter	Email	10/28/2019	
All CUL Staff	November FOLIO Friday	Face-to-Face and Zoom	11/15/2019	
Zsuzsa, Debra, Darcy, Andy, and Jason	FOLIO Communication Plan	Face-to-Face	1/30/2020	https://cornell.app.box.com/file/608015364294
All CUL Staff	Winter FOLIO Implementation Newsletter	Email	2/4/2020	
All CUL Staff	April FOLIO Friday	Zoom	4/17/2020	https://vod.video.cornell.edu/media/FOLIO+Friday/1_d6qd406l
All CUL Staff	May FOLIO Friday	Zoom	5/15/2020	https://vod.video.cornell.edu/media/May+2020+FOLIO+Friday/1_rpq5dljw
All CUL Staff	Spring FOLIO Implementation Newsletter	Email	5/18/2020	
All CUL Staff	June FOLIO Friday	Zoom	6/26/2020	https://vod.video.cornell.edu/media/FOLIO+Friday/1_mdwu2iey

				 <p>Slides:</p>
All CUL Staff	August FOLIO Friday	Zoom	8/14/2020	https://vod.video.cornell.edu/media/1_9xs9gz2f
All CUL Staff	October FOLIO Friday	Zoom	10/16/2020	https://vod.video.cornell.edu/media/FOLIO+Friday/1_rftn2cl5
All CUL Staff	November FOLIO Friday	Zoom	11/13/2020	https://vod.video.cornell.edu/media/1_tovlkvw7
All CUL Staff	January 2021 FOLIO Friday	Zoom	01/08/2021	https://vod.video.cornell.edu/media/1_t9ef62ub
LEG	Project Status Update	Document	01/12/2021	
All CUL Staff	This Week In FOLIO	Email	02/01/2021	User Training Calendar
All CUL Staff	This Week in FOLIO	Email	02/08/2021	
LEG	Project Status Report	Word Doc	02/10/2021	
All CUL Staff	February 2021 FOLIO Friday	Zoom	02/12/2021	https://vod.video.cornell.edu/media/FOLIO%20Friday:%20FOLIO%20Overview%20Demo%20with%20Anya%20Arnold/1_9anigo81
All CUL Staff	This Week In FOLIO	Email	02/15/2021	
All CUL Staff	This Week in FOLIO	Email	02/22/2021	
All CUL Staff	This Week In FOLIO	Email	03/02/2021	
All CUL Staff	This Week in FOLIO	Email	03/08/2021	Scavenger Hunt
LEG	Project Status	Word Doc	03/10/2021	
ALL CUL Staff	Outreach & Engagement Forum	Zoom	03/10/2021	Presented by AUL Simeon Warner: Forums 2021
All CUL Staff	March 2021 FOLIO Friday	Zoom	03/12/2021	https://vod.video.cornell.edu/media/FOLIO%20Friday%3A%20Acquisitions%20Demo%20with%20Dennis%20Bridges/1_tl6p0uq5
All CUL Staff	This Week in FOLIO	Email	03/15/2021	Scavenger Hunt Week 2
ALL CUL Staff	This Week in FOLIO	Email	03/22/2021	
ALL CUL Staff	This Week in FOLIO	Email	03/29/2021	
ALL CUL Staff	This Week in FOLIO	Email	04/05/2021	
ALL CUL Staff	This Week in FOLIO	Email	04/12/2021	
All CUL Staff	April FOLIO Friday	Zoom	04/16/2021	https://vod.video.cornell.edu/media/FOLIO%20Friday%20-%20Offline%20Circ%20Demo%3B%20Voyager%20Snapshot%3B%20FOLIO%20Community%20Governance%20Update/1_h84nk6e0
All CUL Staff	This Week in FOLIO	Email	4/19/2021	
All CUL Staff	This Week in FOLIO	Email	4/26/2021	
All CUL Staff	This Week in FOLIO	Email	5/3/2021	
LEG	Project Status Update	Document	5/4/2021	
All CUL Staff	This Week in FOLIO	Email	5/10/2021	
All CUL Staff	May FOIO Friday	Zoom	5/14/2021	https://vod.video.cornell.edu/media/FOLIO%20Friday/1_9vxmvs5p
All CUL Staff	This Week in FOLIO	Email	5/17/2021	
All CUL Staff	This Week in FOLIO	Email	5/24/2021	

All CUL Staff	This Week in FOLIO	Email	5/31/2021	
ALL CUL Staff	This Week in FOLIO	Email	6/7/2021	
LEG	Project Status Update	Document	6/8/2021	
All CUL Staff	FOLIO Friday	Zoom	6/11/2021	https://vod.video.cornell.edu/media/FOLIO%20Friday/1_rxgdsflb
All CUL Staff	This Week in FOLIO	Email	6/14/2021	
All CUL Staff	July 1 Go-Live Decision	Email	6/14/2021	From AUL Simeon Warner
All CUL Staff	This Week in FOLIO	Email	6/21/2021	
LEG	FOLIO Project Update	Document	6/22/2021	Delivered by AUL Simeon Warner
All CUL Staff	Go-Live Updates	Email / Slack	6/28/2021 - J7/2/2021	
LEG	FOLIO Project Update	Document	6/29/2021	Delivered by AUL Simeon Warner
All CUL Staff	Go-Live Announcement	Email	7/1/2021	

Old Communications Log

Oops! Forgot to keep up to date...

Audience	Communication	Vehicle of Communication	Date Delivered	Available Materials
All CUL Staff	Monthly status update	Email	11/10/2015	Email
The World	Press release about Cornell joining OLE Partnership	Press Release	01/06/2016	Press Release
All CUL Staff	Monthly status update.	Email	01/07/2016	Email
All CUL IT Staff	Project overview at CUL IT "All Hands" meeting	Face-to-Face	02/08/2016	PowerPoint Presentation
Extended Project Team	Project kickoff meeting for extended project team	Face-to-Face	02/22/2016	PowerPoint Presentation
All CUL IT Staff	Monthly status update	Email	02/23/2016	Email
All CUL Staff	Email from Dean regarding change to CUL plan	Email	03/04/2016	Email
Career Development Days	Current status, future plans, etc. plus answer questions	In Person	4/20/15 in Mann 102	PowerPoint Presentation (to be created)

Contacts List


[FOLIO Developer Directory](#)

[FOLIO Product Owner Directory](#)

[FOLIO UX/UI Directory](#)

[Members of Special Interest Groups \(SIGS\)](#)

Proposals & Agreements

File	Modified 
Microsoft Word Document OLE Proposal November 2015 - Version 2.docx Proposal for IT Governance	Dec 09, 2015 by Holly L. Mistlebauer
Microsoft Word Document 2016-OLEMOU-Cornell-final.docx Memo of Understanding to OLE	Dec 09, 2015 by Holly L. Mistlebauer

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Requirements

See [Requirements Management Plan](#) or [Scope Management Plan](#)


History of CUL's LMS/ILS Requirements

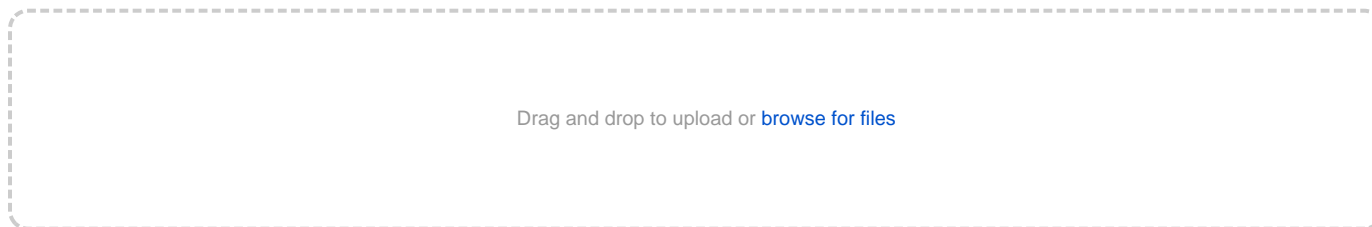
1. CUL functional areas created [requirements](#) in 2015, prior to evaluating ALMA and OLE, as part of the *2CUL LMS Replacement Project*. (Reporting requirements are from 2017 and are available [here](#)--filter Institution column by Cornell to see just the CUL reports.)
2. Requirements from all OLE libraries were gathered to create the [Functional Requirements Matrix](#) in 2016 (Jesse represented CUL).
3. The [Functional Requirements Matrix](#) was used to create the [FOLIO Roadmap Spreadsheet](#) in 2016 (with a tab for each functional area).
4. The FOLIO Product Council reviewed the [FOLIO Roadmap Spreadsheet](#) in January 2017 to identify which features needed to be implemented first and which could wait (Jesse represented CUL).
5. The Product Owner for the functional area uses the higher priority features from the [FOLIO Roadmap Spreadsheet](#) as a starting point for discussions with the SIG.
6. The Product Owner gathers detailed requirements from the SIG (which includes a CUL representative), a mock-up is developed (if needed), and a user story is created (which is the written requirement in the AGILE world).
7. In mid-2018 a "Gap Analysis/Feature Prioritization" was conducted to determine which features are needed by the "early implementers" and if any features are missing (Jesse led this effort for CUL).
8. CUL's "Gap Analysis/Feature Prioritization" results are available [here](#)--in effect these are CUL's "official" requirements.
9. The Product Owners now use the prioritization from the "Gap Analysis/Feature Prioritization" to determine which features to work on next.
10. Holly updated Cornell's "[official requirements](#)" on 9/30/2018 to include new features added to the UXPROD JIRA project.
11. New FOLIO features are added regularly, so the "early implementers" need to supply priorities on a regular basis (Jesse leads this effort for CUL).
12. Holly updated Cornell's "[official requirements](#)" on 11/8/2018 in preparation for a meeting with LEG on 11/14/2018.

Children Pages

- [Compare CUL's Requirements to FOLIO Features](#)
- [Old OLE Requirements Page](#)

Attachments

File	Modified 
Microsoft Excel Spreadsheet Functional Matrix.xlsx	Aug 29, 2018 by Holly L. Mistlebauer
PDF File Functional Matrix.pdf	Aug 29, 2018 by Holly L. Mistlebauer
Microsoft Excel Spreadsheet FOLIO 2018 Release.xlsx	Aug 29, 2018 by Holly L. Mistlebauer



 [Download All](#)

Compare CUL's Requirements to FOLIO Features

Exercise

Each functional area needs to confirm that the requirements identified in 2015 are covered by the latest version of the features in FOLIO.

Tools

1. [Google spreadsheet containing original requirements](#) for each functional area (which you should feel free to edit as needed, adding columns, etc.–the originals are safe).
2. [Google document containing original requirements for reporting](#) (which Sharon should feel to edit as needed–the originals are safe).
3. [Google spreadsheet containing current FOLIO features required by CUL](#)

Sub-Sections for Functional Areas

- [Finance](#)
- [Information Technology](#)
- [Public Services](#)
- [Reporting](#)
- [Technical Services](#)

File

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Finance

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Information Technology

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Public Services

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Reporting

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Technical Services

File

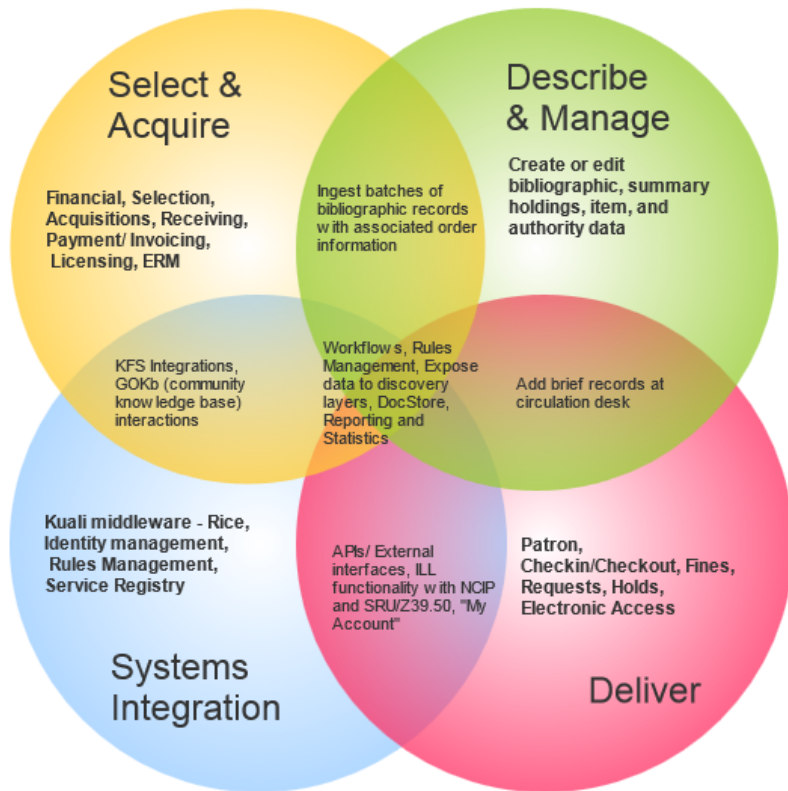
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Old OLE Requirements Page

See [Requirements Management Plan](#) or [Scope Management Plan](#)




- [Deliver Requirements](#)
- [Describe & Manage Requirements](#)
- [Select & Acquire Requirements](#)
- [Systems Integration Requirements](#)

File	Modified
Microsoft Word Document Duke OLE critical functionality.docx	Aug 29, 2018 by Holly L. Mistlebauer
Microsoft Word Document Duke OLE Fit-Gap Report.docx	Aug 29, 2018 by Holly L. Mistlebauer
PNG File Modules.png	Aug 29, 2018 by Holly L. Mistlebauer

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Deliver Requirements

File	Modified 
Microsoft Excel Spreadsheet Access Requirements1215.xlsx	Dec 02, 2015 by Debra Sue Lamb-Deans
Microsoft Word 97 Document ChicagoCirculationRequirements.doc	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Excel Spreadsheet accessrequirementsfinal.xlsx	Jan 20, 2016 by Debra Sue Lamb-Deans


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Describe & Manage Requirements

Technical Services Documentation. Needs updating to reflect OLE 3.0 and current knowledge:


<https://docs.google.com/spreadsheets/d/1JXYEBjCb6prBjnmXgU0QE5-HWqajH6tJa5VwuZMQvKU/edit?usp=sharing>

File	Modified 
Microsoft Word 97 Document ChicagoAuthorityRequirements.doc	Jan 13, 2016 by Holly L. Mistlebauer
PDF File ChicagoCataloging Requirements.pdf	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Excel Spreadsheet Kualii OLE Describe and Manage.xlsx	Jan 14, 2016 by Jesse T. Koennecke

Drag and drop to upload or [browse for files](#)

 [Download All](#)

Select & Acquire Requirements

File	Modified 
Microsoft Word Document Finance OLE System requirements.docx	Dec 03, 2015 by Ann Marie Crowley
Microsoft Word 97 Document ChicagoAcqSerialsRequirments.doc	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Excel Spreadsheet Kualii OLE Select and Acquire.xlsx	Jan 14, 2016 by Jesse T. Koennecke

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Systems Integration Requirements

Security

- Authenticate library staff via central authentication
- (Optional) Integrate OLE roles with central AD groups or similar central authz solution
- If needed, authenticate patrons via central auth (if patrons have any direct access to OLE)
- What about non-netid patrons
- 2-factor?
- Security review/assessment from ITSO

Infrastructure

- Determine infrastructure sizing for dev/test/prod
- Develop data conversion for Voyager data
- Develop deployment and operational management practices

Integration

See [Integration List](#)

Reporting

- Assuming slave for live queries, warehouse as appropriate
- Minimal direct DB access for reporting, most through BIRT
- Lydia has an inventory of reports w/criteria

Batch processing

- Select a set of metadata records based on arbitrary criteria and return either the contents of those records or a selected set of fields from each (2 different tab delimited formats).
- Return a full set of MARC records based on a list of bib keys.
- Efficiently load bib, holdings, and item information in batch mode
- We are developing an inventory of specific jobs that are run regularly by tech services, both in pre-canned format and ad hoc queries/jobs.

Auxiliary tools

- Shelf browse counter
- (Pete needs to inventory these)

File

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Risk Register

See [Risk Management Plan](#)

Risk Statement	Probability	Impact	Responsible Party	Actions	Status	Comments
Lack of resources and participation from CUL staff	High	High	Implementation Management Team	When testing begins, monitor actual time spent against what was planned to see if we are on schedule.		We are hoping the extended test period will allow staff to fit in testing along with their regular work.
Functionality we need not available by January 2020 for testing	Medium	High	Implementation Management Team	Functional team leaders will bring these issues to the Implementation Team as they arise.		
Resistance to change from staff	Medium	High	Implementation Management Team	Functional team leaders will work with their staff to ensure that any misconceptions and issues are addressed. Holly will send monthly updates to CU-LIB plus plan live sessions where questions will be answered. For folks who wish to remain anonymous, a Qualtrics Survey has been setup for reporting issues /questions.		The implementation of FOLIO will be a big change for most CUL staff. The application and work flows used will be different. The main concern is that misinformation will make the rounds. We will operate a transparent project whereby encountered issues are publicly known. We will also request input from appropriate staff in addressing the issues that arise.
Unpredictable technical obstacles	Low	Depends	New Chris	We will learn from other institutions as they implement FOLIO.		
FOLIO implementation delayed beyond Summer 2020	Medium	High	New Chris	Voyager is RHEL6, which reaches end-of-support at the end of November 2020 (and there are VM blades being replaced). If the migration to FOLIO slips past summer 2020, we will need to plan for a migration to either a new OS locally, or more likely to AWS (and probably should upgrade Voyager software too).		

Staff Assignments & Responsibilities

See [Human Resource Management Plan](#) for list of responsibilities for each position

CUL FOLIO IMPLEMENTATION SUB-TEAMS

Project Management

Team Leader: Debra Howell

Team Members:

- Assistant Project Manager (TBD)
- Project Administrative Assistant (TBD)

Reporting

Team Leader: Sharon Beltaine

Team Members:

- ?

Infrastructure

Team Leader: Phil Robinson

Team Members:

- ?

Finance

Team Leader: Ann Crowley

Team Members:

- Ken Putnam, Library Finance & Budget Director
- Library F&B staff (Nancy Bolduc, Cindy Bosley, Susan Bristol, Cindy Sweet)

Discovery

Team Leader: Mary Beth Martini-Lyons

Team Members:

- ?

Resource Access

Team Leader: Deb Lambs

Team Members:

- Cammie Wyckoff (Annex)
- Caitlin Finlay (ILL/Borrow Direct/Offsite Programs)
- Joanne Leary (Voyager Expert)
- Anne Carson (RMC)
- As needed: Wendy Wilcox (Reserves), Tobi Hines (Circulation), Maggie Ambrose (Circulation), and Michelle Hubbell (Billing)
- Include in communications: Greg Green (Southeast Asia Collection)

Acquisitions

Team Leader: Jesse Koennecke

Team Members:

- ?

Serials Processing

Team Leader: Jesse Koennecke

Team Members:

- ?

Metadata Management/Cataloging

Team Leader: Jason Kovari

Team Members:

- ?

eResource Management

Team Leader: Peter McCracken

Team Members:

- ?

Responsibility Assignment Matrix (RAM) aka RACI

Feature /Function	Assignee 1	Assignee 2	Assignee 3	Assignee 4	Assignee 5	Assignee 6	Assignee 7	Assignee 8	Assignee 9	Assignee 10	Assignee 11	Assignee 12
	R=Responsible ; A=Accountable; C=Consult; I=Inform											
	R=Responsible ; A=Accountable; C=Consult; I=Inform											
	R=Responsible ; A=Accountable; C=Consult; I=Inform											
	R=Responsible ; A=Accountable; C=Consult; I=Inform											
	R=Responsible ; A=Accountable; C=Consult; I=Inform											
	R=Responsible ; A=Accountable; C=Consult; I=Inform											

R=Responsible: Person performing work

A=Accountable: Person making sure work is correct and on time

C=Consult: Person who has information necessary to complete the work

I=Inform: Person should be notified when work complete

Stakeholder Register

See [Stakeholder Management Plan](#)

The Stakeholder Register includes individuals or groups involved in the project or whose interests may be affected by the project's execution or outcome...

Name	Organization /Department	Title	Project Role	Email	Phone	Engagement Level	Major Concerns	Relationship Owner	Mode of Communication	Frequency of Communication	Comments
Patrons (Faculty, Staff, and Students)	CUL		Project Beneficiary			Minimal effort		ZsuZsa Koltay	Email and Press Releases	As needed	
Library Executive Group (LEG)	CUL Administration		Project Sponsor			Keep satisfied		New Dean Krafft or Debra Howell?	Face-to-Face	LEG meetings as appropriate	
Library Directors Group	CUL Administration		Project Beneficiary			Keep satisfied		Deb Lamb	Face-to-Face	Meetings scheduled	
Library Manager Council (MC) members hip	CUL		Project Beneficiary			Keep satisfied		Phil Robinson? (was Chris Manly)	Face-to-Face	MC meetings as appropriate	
ZsuZsa Koltay	CUL Communications/ Assessment		Generate project-related communications to patrons			Minimal effort		Debra Howell	Email and Face-to-Face	As needed	Holly had introduct meeting w Zsuzsa o /2016
Technical Services Staff	CUL Technical Services		Assist in testing, training, and documentat ion activities			Key player		Jesse Koennecke, Jason Kovari, Peter McCracken	Email and Face-to-Face	As needed	
Access Services Staff	CUL Access Services		Assist Deb in testing, training, and documentat ion activities			Key player		Deb Lamb	Email and Face-to-Face	As needed	
Reference Staff	CUL Reference Departments		Assist in testing D&A interface -- project won't change patron front-end			Minimal effort		Mary Beth Martini-Lyons	Email and Face-to-Face	As needed	
Rare and Manuscript Collections	CUL RMC		Assist in testing, training, and documentat ion activities			Key player		Margaret Nichols via team member(s) TBD	Email and Face-to-Face	As needed	
Southeast Asia Collection	CUL SE Asia		Assist in testing, training, and documentat ion activities			Keep informed		Greg Green via Deb Lambs	Email and Face-to-Face	As needed	
Finance	CUL Finance		Assist in testing, training, and documentat ion activities			Key player		Ann Crowley	Email and Face-to-Face	As needed	
Information Technology	CUL IT		Assist in testing, modification s, training, and documentat ion activities			Key player		Phil Robinson	Email and Face-to-Face	As needed	
	CUL					Key player			Face-to-Face		

CD Executive Committee (CD Exec)			Assist in testing, training, and documentation activities				Team member(s) TBD		CD Exec meetings as appropriate	
PS Executive Committee (PSEC)	CUL (via co-chairs Dan Hickey and Amy Emerson)		Assist in testing D&A interface -- project won't change patron front-end			Minimal effort	Mary Beth Martini-Lyons	Email and Face-to-Face	PSEC meetings as appropriate	Holly had introduct meeting w Dan and on 2/12/2
LTS Senior Management Team	CUL		Assist in testing, training, and documentation activities			Key player	Jesse Koennecke, Jason Kovari, Peter McCracken	Face-to-Face	Group meetings as appropriate	Law Libr has its ov group, so Jean Pajt is represe Law
Bursar	CU Bursars Office		Help us to verify Bursar interface will work			Minimal effort	Phil Robinson	Email	As needed	
KFS	CU Accounting Office		Help us to verify Accounting interface will work			Minimal effort	Phil Robinson	Email	As needed	
PeopleSoft	CU Human Resources		Help us to verify PeopleSoft interface will work			Minimal effort	Phil Robinson	Email	As needed	
Central Authorization	CU CIT		Help us to verify weblogin interface will work			Minimal effort	Phil Robinson	Email	As needed	
IT Security	CUL IT Security		Help us to test OLE code for security issues			Minimal effort	Phil Robinson	Email	As needed	
Access Report Users	CUL		Work with Lydia to identify needed reports and insure they will run correctly with OLE			Key player	Phil Robinson	Email and Face-to-Face	As needed	
Discovery & Access Front End	CUL Public Services		Verify that D&A interfaces to services work			Minimal effort	Mary Beth Martini-Lyons	Email	As needed	
Discovery & Access Back End	CUL Public Services		Build D&A Solar index from OLE database			Minimal effort	Phil Robinson	Email	As needed	
Adam Chandler	CUL LTS		Verify that POOF! interface works			Minimal effort	Phil Robinson	Email	As needed	
Caitlin Finlay	CUL Inter-library Services		Verify that Borrow Direct and ILLIAD interfaces still work			Minimal effort	Deb Lamb	Email	As needed	
Cammie Wyckoff	CUL Annex		Verify that Annex interface still works			Key player	Deb Lamb	Email and Face-to-Face	As needed	
Gary Branch	CUL LTS		Verify that LS Tools, Patron-driven print books, and Patron-driven acquisitions still work			Key player	Phil Robinson (LS Tools); Jesse Koennecke (patron-driven)	Email and Face-to-Face	As needed	

Keith Jenkins	Mann Library, Research Services		Verify that New Books interface still works			Minimal effort		Phil Robinson	Email	As needed	
Margaret Nichols	CUL RMC		Verify that AEON interface still works			Minimal effort		Deb Lamb	Email and Face-to-Face	As needed	
Peter Martinez	CUL LTS		Verify that catalog loads outside LS Tools still work			Key player		Phil Robinson	Email and Face-to-Face	As needed	
Wendy Wilcox	OKU Access Services		Verify that ARES interface still works			Minimal effort		Deb Lamb	Email	As needed	
New Dean Krafft	CUL IT		Project Sponsor Designate			Key player		Self	n/a	n/a	
Debra Howell	CUL IT		FOLIO Implementation Project Manager			Key player		Self	n/a	n/a	
Holly Mistlebauer	CUL IT		OLE Project Manager			Key player		Self	n/a	n/a	
Ann Crowley	CUL Finance		Finance Lead			Key player		Self	n/a	n/a	
Phil Robinson	CUL IT		Infrastructure Lead			Key player		Self	n/a	n/a	
Deb Lamb	CUL Public Services		Resource Access Lead			Key player		Self	n/a	n/a	
Jesse Koennecke	CUL Technical Services		Acquisitions and Serials Processing Lead			Key player		Self	n/a	n/a	
Jason Kovari	CUL Technical Services		Metadata Management and Cataloging Lead			Key player		Self	n/a	n/a	
Peter McCracken	CUL Technical Services		eResource Management Lead			Key player		Self	n/a	n/a	
Mary Beth Martini-Lyons	CUL Digital Scholarship & Preservation Services		Discovery Lead			Key player		Self	n/a	n/a	
OLE Partners	OLE Partnership		Support Implementation			Keep informed		Gerald Beasley	Email and Face-to-Face	Monthly OLE Board meetings	OLE Board also attend regular Stakeholder meetings EBSCO & Indexdata
OLE Steering Committee	OLE Partnership		Support Implementation			Keep informed		Holly Mistlebauer	Email and Face-to-Face	Weekly OLE Steering Committee meetings	
FOLIO Product Council	OLE Partnership		FOLIO Product			Keep informed		Jesse Koennecke	Email and Face-to-Face	Weekly Product Council meetings	Holly Mistlebauer also a member of PC because of her role as OLE Project Manager

Status Reports


See [Communication Management Plan](#)

Plan to start monthly CUL implementation status report when monthly Community Newsletter starts in January 2019...

Project Status Report

Include:

- Accomplishments for this reporting period
- Accomplishments planned by not completed this reporting period
- Root cause of variances
- Impact to upcoming milestones or project due date
- Planned corrective or preventive action
- Accomplishments planned for next reporting period

File	Modified 
Microsoft Word Document FOLIO Status - 20200416.docx	Apr 20, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200501.docx	May 01, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200514.docx	May 14, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200528.docx	May 28, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200611.docx	Jun 11, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200626.docx	Jun 26, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200709.docx	Jul 09, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200723.docx	Jul 23, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200807.docx	Aug 10, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 202008021.docx	Aug 21, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20200904.docx	Sep 08, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20201002.docx	Oct 02, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 202010016.docx	Oct 16, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20201113.docx	Nov 13, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20201211.docx	Dec 11, 2020 by Debra Howell
Microsoft Word Document FOLIO Status - 20201222.docx	Jan 08, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210108.docx	Jan 08, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210122.docx	Jan 25, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210204.docx	Feb 04, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210219.docx	Feb 22, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210305.docx	Mar 12, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210319.docx	Mar 19, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210402.docx	Apr 02, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210416.docx	Apr 16, 2021 by Debra Howell

Microsoft Word Document FOLIO Status - 20210430.docx	May 17, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210514.docx	May 17, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210528.docx	May 28, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210611.docx	Jun 11, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210625.docx	Jun 25, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210702.docx	Jul 02, 2021 by Debra Howell
Microsoft Word Document FOLIO Status - 20210709.docx	Jul 09, 2021 by Debra Howell

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Transition Plan

	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 June 18 	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.

File
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Project Management Plan

Sub-Sections

- [Change Management Plan](#)
- [Communication Management Plan](#)
- [Cost Baseline](#)
- [Cost Management Plan](#)
- [Human Resource Management Plan](#)
- [Issue Management Plan](#)
- [Managing Change](#)
- [Procurement Management Plan](#)
- [Quality Management Plan](#)
- [Risk Management Plan](#)
- [Schedule Baseline](#)
- [Scope Management Plan](#)
- [Scope Statement](#)
- [Stakeholder Management Plan](#)
- [Time Management Plan](#)

Attachments

File	Modified 
Microsoft Word 97 Document OLE Project Management Plan.doc Duke's OLE Project Management Plan	Nov 30, 2015 by Holly L. Mistlebauer

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Change Management Plan

See [Change Log](#)

Change Management Approach

This Change Management Plan was created in order to set expectations on how the approach to changes will be managed. The plan will ensure that all proposed changes are defined, reviewed, and agreed upon so they can be properly implemented and communicated to all stakeholders. This approach will also ensure that only changes within the scope of this project are approved and implemented.

Definitions of Change

There are several types of changes which may be requested and considered for this project:

- Schedule - Changes which impact the approved project schedule.
- Scope - Changes which are necessary and impact the project's scope.
- Budget - Changes which will impact the approved project budget.
- Quality - Changes due to quality of FOLIO.

Project Assumptions and Constraints

See [Assumptions and Constraints Log](#).

Estimate of Change Volume

- We are unlikely to document budget changes unless they are significant.
- Testing is beginning early, so we don't anticipate schedule changes.
- Given that we are not developing FOLIO, at least not on our own, we are unlikely to have scope changes.
- Quality issues will only be addressed if the lack of quality is a show stopper for the project.

Roles and Responsibilities

Role	Responsibilities
Stakeholder	Propose change to rest of team in status meeting or via email
Project Team Members	Evaluate change and identify impact and options
Project Manager	Log change
AUL	Approve/deny change or take change to LEG for approval
LEG	Approve/deny change if escalated to LEG
Project Manager	Update log with decision
Project Manager	Notify stakeholders of change
Project Manager	Implement change

Communication Management Plan

See [Communications Log](#) or [Status Reports](#)

Project Communication Approach

The Project Manager will take a proactive role in ensuring effective communication on this project. The communication requirements are documented in the Communication Matrix below. The Communication Matrix is used as the guide for information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

As part of identifying all project stakeholders, the Project Manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the Project Manager in the project's [Stakeholder Register](#). The Communication Matrix and [Stakeholder Register](#) are used as the basis of all project communication. Additional individual communication will occur as needed.

It is the responsibility of the Module Coordinators to communicate information pertinent to the staff in their departments.

Project Communication Matrix

Audience	Purpose	Delivery Method	Delivery Frequency	Communicator	Comments
Library Executive Group (LEG)	Provide project status, address any concerns or issues, and answer questions.	Face to Face	Every LEG meeting	Project Sponsor	Dean's replacement would take over this role
Library Managers Council	Provide project status, address any concerns or issues, and answer questions.	Face to Face	Every MC meeting	Kizer Walker and Chris Manly, who already attend meetings	Kizer is no longer a part of the project team—if Phil or Debra are part of group they could be liaison
Library Directors Group	Provide project status, address any concerns or issues, and answer questions.	Emails /Face to Face	As needed	Project Manager	
CUL Staff	Keep informed of progress, challenges, and accomplishments.	Email	Monthly	Project Manager	Plan to restart this when <i>Community Newsletter</i> starts up in January 2019. Will forward <i>Community Newsletter</i> to CUL staff along with a CUL-specific status report.
CUL Staff	Provide information about the project, team, activities, etc.	Wiki	Ongoing	Project Manager and Functional Area Leads	Added special "CUL Staff Quick Links" section.
CUL Staff	Provide project status, address any concerns or issues, and answer questions.	Face to Face	As needed, but at least quarterly	Project Manager and Functional Area Leads	Started with monthly FOLIO First Fridays. Now that we are getting closer to implementation should go back to monthly.
CD Executive Committee (CD Exec)	Discuss aspects of project directly impacting the group.	Face to Face	As needed	Project Manager	
PS Executive Committee (PSEC)	Discuss aspects of project directly impacting the group.	Face to Face	As needed	Functional Area Lead	Access Services group reports up to PSEC.
LTS Senior Management Team	Discuss aspects of project directly impacting the group.	Face to Face	As needed	Functional Area Leads	
Additional Stakeholders	Provide pertinent information, address any concerns or issues, and answer questions.	Email/Face to Face	As needed	Project Manager and Functional Area Leads	
Department Members	Share information about specific functionality.	Email/Face to Face	Ongoing	Functional Area Leads	
CUL FOLIO Implementation Team	Provide sub-team status, address any concerns or issues, and answer questions.	Face to Face	Weekly	Project Manager and Functional Area Leads	
CUL FOLIO Implementation Sub-Teams	Provide team status, address any concerns or issues, and answer questions.	Face to Face	As needed	Functional Area Leads	

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Communication Message Contents

Project Plans

- Current and Future Plans
- Project Issues and Problems
- Planned Project Deliverables for Next Period

Status Report

- Status Summary
- Status of Schedule
- Status of Budget
- Status of Scope
- Accomplishments Achieved
- Concerns/Issues
- Next Steps
- Project Team Members

Project Briefing

- Goals of Project Management Improvement
- Project Status
- Project Problems and Issues
- Project Checklist

Cost Baseline

See [Budget](#) for current budget

The Cost Baseline is the current approved budget for the project. If a change is needed, the change must be approved by LEG and then the new budget becomes the Cost Baseline. We don't anticipate any changes to the budget.

Unit	Description	Nov '15- Jun '16	July '16- Jun '17	July '17- Jun '18	July '18- Jun '19	Total
All	Travel/training: 25 trips/yr@\$2000/trip	\$33,333	\$50,000	\$25,000	\$0	\$108,333
All	OLE Partnership	\$78,334	\$117,500	\$117,500	\$117,500	\$430,834
All	Voyager Maintenance/License (change from existing)	\$0	\$0	-\$220,000	-\$220,000	-\$440,000
CUL-IT	Backfill 40% of Holly Mistlebauer as Project Manager	Confidential	Confidential	Confidential	Confidential	Confidential
CUL-IT	Backfill 50% of Frances Webb for OLE integration development	Confidential	Confidential	Confidential	Confidential	Confidential
CUL-IT	Fund 50% of DevOps position for IT ops (unfunded half of existing DevOps position)	Confidential	Confidential	Confidential	Confidential	Confidential
CUL-IT	Net cost for OLE VM servers	\$20,000	\$30,000	\$30,000	\$15,000	\$95,000
LTS	1.0 FTE Payband D for one year in Acquisitions & E-Resource Licensing Services	Confidential	Confidential	Confidential	Confidential	Confidential
LTS	0.51 FTE Payband E for six months on the LTS documentation team, May 2017 – October 2017	Confidential	Confidential	Confidential	Confidential	Confidential
Publics Svces	Circulation staff backfill	\$8,500	\$35,500	\$0	\$0	\$44,000
Totals		\$246,448	\$392,648	\$149,949	-\$17,481	\$771,565

Cost Management Plan

See [Budget](#) for current budget

Will not be managing the costs for this project. The budget has been documented in FTEs, server costs, and OLE partnership fees rather than a generated estimate based on the work at hand.

Human Resource Management Plan

See [Staff Assignments & Responsibilities](#)

Roles and Responsibilities

Project Sponsor

- Authorizes the project and approves the project goals and objectives, its scope, schedule, and the project management plan.
- Acts as a vocal and visible champion for the project.
- Makes local decisions and seeks library/institution approvals as needed by the project.

Project Manager

- Ensures that the project team completes the project on schedule and within budget and scope.
- Creates the project teams and manages their performance.
- Develops the project management plan, timeline and schedule.
- Manages communication including status reporting and risk management.
- Conducts weekly status meetings, which is the main communications venue between teams.

Functional Area Lead

- Develops sub-team of subject-area experts to assist.
- Main communication venue between main team and sub-team.
- Defines functional area requirements and ensures their accuracy by having them reviewed by others.
- Generates functional area test plans and carries out the tests, including those with integrating applications.
- Identifies and implements workflow changes.
- Verifies accuracy of configurations and migrated/converted data.
- Immediately notifies Project Manager when a "show stopper" is discovered.
- Identifies desired future software changes for functional-area.
- Contributes and evaluates functional area documentation.
- Contributes and evaluates functional area training.

Implementation Manager

- Implements software for test purposes.
- Responsible for transformation and migration of data.
- Implements and monitors software on production servers.
- Ensures security of application.
- Reports problems to Project Management immediately.

Training Coordinator

- Works with Functional Area Leads and other subject-area experts to develop training courses by functional area.
- Determines training date, time, and location.
- Notifies potential attendees of training availability.
- Manages attendee list for training sessions.
- Assists Functional Area Leads and/or subject-area expert in conducting training.
- Notifies Project Manager as training sessions are scheduled and held.
- Updates training materials as needed.

Department/Functional Managers

- While not part of the project team, department/functional managers are responsible for providing resources for the project.
- Conduct performance appraisals of assigned resources based, in part, on the PM's feedback regarding project performance.

Responsibility Assignment Matrix

Task	Project Manager	Functional Area Lead	Implementation Manager	Training Coordinator	Department/Functional Managers
Requirements Gathering	A	R			I
Software Testing	A	R	R		I
Develop Documentation	A	R			I
Conduct Training	A	R		R	C
Implementation	A	R	R		C

A=Accountable for ensuring task completion

R=Responsible for completing work

C=Consulted before any decisions are made

I = Informed when decision has been made

Issue Management Plan

See [Issue Log](#)

Issue Management Approach

A goal of this project is to identify issues as soon as they arise and to resolve them expeditiously. All team members are enjoined to be vigilant, particularly in their areas of expertise, but also to raise issues outside of their areas of specific responsibility when they become aware of them.

The Project Manager will be responsible for the timely resolution of the issues documented on the [Issue Log](#). The Project Sponsor must approve the issue resolution before it is implemented.

Issue Management Process

The Project Manager will do the following:

- Access and record an identified issue
- Assign a priority to the issue
- Assign a resolution due date for the issue and the person responsible to resolve it
- Monitor the status of issue resolution
- Escalate issue as appropriate
- Report issue manage activity to the appropriate stakeholder(s)
- Manage the [Issue Log](#)

Managing Change

When introducing major change to an organization, the "process must be well thought out and the effect of the change anticipated. The impact of major changes within an organization can be substantial, and in many cases, destructive, requiring leaders to carefully develop their strategies for change. The main focus of that strategy is to create a change ready organization where the team members and employees understand why the change is necessary, how it can affect the future, and why it is important to support and embrace change."----*Creative and Innovative Change Leadership* by Frank P. Saladis

10 Principle of Change Management by John Jones, et al:

1. Address the "human side" systematically--must be proactive rather than reactive.
2. Start at the top--leaders must provide strength, support, and direction.
3. Involve every layer--there are leaders at every level that must be identified and given responsibilities.
4. Make the formal case--people will question if change is the right way to go.
5. Create ownership--you don't want mere buy-in or passive agreement; ownership is created by involving people.
6. Communicate the message--don't assume people understand what is happening and why; must communicate the core message often.
7. Address the cultural landscape--this culture is an amalgam of many things, including common attitudes and behavior; major problems and conflicts may be brought to the surface.
8. Address culture explicitly--after the culture is understood (doesn't really apply to CUL).
9. Prepare for the unexpected--must continually reassess.
10. Speak to the individual: "Change is both an institutional journey and a very personal one. People spend many hours each week at work; many think of their colleagues as a second family. Individuals (or teams of individuals) need to know how their work will change, what is expected of them during and after the change program, how they will be measured, and what success or failure will mean for them and those around them. Team leaders should be as honest and explicit as possible. People will react to what they see and hear around them, and need to be involved in the change process."

Notes from above:

- Need to focus on people, not just technology
- Address individuals, not just the larger group
- Regular face-to-face meetings with staff
- Way to report issues anonymously
- Regular email updates to staff
- Communicate issues honestly, but focus on positive
- Meetings and demos within specific departments
- Workflow planning with all impacted
- Celebrate milestones, not just at end of project
- Have get together before something happens
- Involve as many people as possible in testing and implementation
- Predict negative responses and address in advance
- Create thorough documentation
- Provide thorough training
- Provide extra expert help initially
- Project team needs to remain positive
- Issues from any staff member needs to be addressed

What should we do?

- Monthly face-to-face meetings with all CUL staff (recorded for those who cannot attend) which will cover current status, demos, and answer questions.
- Emails regarding issues that pop up between face-to-face meetings.
- Wiki link titled [Make anonymous comment](#).
- Occasional email reminding people how to engage.
- Request 10 minutes of All Staff Meeting to discuss FOLIO status and take questions.

File

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No files shared here yet.

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Procurement Management Plan

There will be no procurement by this project outside of the OLE partnership fees and server costs.

Quality Management Plan

See [Test Plans](#).

Quality Management Approach

The quality management approach for the FOLIO implementation will ensure quality is planned for both the product and process. The requirements being used must accurately reflect the needs of CUL and the test plans must fully test the fulfillment of these requirements. If the Functional Area Lead and associated sub-team believe that the requirement has been met, it will officially be declared as having been met. Due to the nature of this project, we don't have specific quality measurements.

Plans for Testing

Initial testing of FOLIO will be using the Aster Release (aka Q4 2018) with "canned" test data. The purpose of this testing is to familiarize CUL staff with FOLIO and to identify any gaps in the FOLIO workflow.

Next will be controlled testing of each release with CUL's Voyager data loaded. Some of the controlled tests will be managed as an AGILE sprint. This will be helpful in pulling together all of the stakeholders for a specified time period and having the assistance of Library Systems in testing the interfaces.

The results of the tests should be documented in the [test plans](#). Issues encountered should be recorded in the [Issue Log](#) ASAP.

Risk Management Plan

See [Risk Register](#) for all risks

Top Three Risks

Lack of critical functionality required by some stakeholders

FOLIO should have what we need, but to insure this we completed a Gap Analysis/Feature Prioritization in 2018, will participate in a second Gap Analysis /Feature Prioritization in 2019, will do controlled testing of each FOLIO release with CUL data, and will monitor when features we need are planned and completed.

Lack of resources and participation from CUL staff

We are hoping the extended test period will allow staff to fit in testing along with their regular work. We also plan on conducting sprints to test specific critical functions. This will tie up staff for a short period of time and then free them for a longer period of time. The Project Manager will track actual progress against planned progress to insure that the project remains on schedule.

Resistance to change from staff

The implementation of FOLIO will be a big change for most CUL staff. The application and work flows used will be different. The main concern is that misinformation will make the rounds. We will operate a transparent project whereby encountered issues are publicly known. We will also request input from appropriate staff in addressing the issues that arise. The Project Manager will send monthly updates to CU-LIB plus plan live sessions where questions will be answered. For folks who wish to remain anonymous, a Qualtrics Survey has been setup for reporting issues/questions.

Risk Management Approach

- Team members are responsible for identifying and documenting risks.
- Risks will be identified by looking at previous similar projects, by brainstorming with project team members, and by interviewing key stakeholders.
- Risks will be documented in the [Risk Register](#), which is a log of all identified project risks, their probably and impact to the the project, and the actions we plan to take to mitigate the risk.
- The top three risks are presented above and the rest are located in the [Risk Register](#).
- The top risks may change as the project progresses.
- We plan to mitigate the risks ASAP.
- The status of the project risks will be discussed at weekly team meetings.

Schedule Baseline

See [Project Schedule](#)

UNDER CONSTRUCTION!

Scope Management Plan

See [Scope Statement](#) or [Requirements](#)

Scope Management Approach

- For the CUL FOLIO Implementation Project, scope management will be the responsibility of the Project Manager and the Functional Area Leads.
- The Functional Area Leads will establish the requirements and ensure that the requirements are met by FOLIO.
- Given that FOLIO is not being developed by this particular project, there will be no scope change necessary.

Scope Definition

- The scope of this project was defined by the [requirements](#) documented by the Functional Area Leads.
- The [Scope Statement](#) is a high-level description of what will be included and excluded from this project.
- The scope has been approved by the Project Sponsor.

Scope Verification

- The Functional Area Leads will verify the project deliverables against the original scope (aka [requirements](#)).
- Once the Project Manager has confirmed that the requirements have been met, the Project Sponsor will be contacted for approval.

Scope Control

- The Project Manager and Functional Area Leads will work together to control the scope of the project.
- The Project Team will ensure that they perform only the work described in the [Scope Statement](#).
- The Project Manager will oversee the Project Team and the progression of the project to ensure that the [Scope Statement](#) is followed.
- Any need to deviate from the [Scope Statement](#) must be reported to the Project Manager ASAP.

Scope Statement

See [Scope Management Plan](#)

Scope Description

- Testing various functions of FOLIO to insure that function will work for CUL
- Identifying any functions that are not available in FOLIO but needed by CUL, but not actually develop them
- Identifying any workflow changes that need to be made
- Customizing FOLIO for Cornell
- Security review of FOLIO
- Transforming and migrating of 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
- Integrating into the larger FOLIO community

Project Deliverables

- Confirmation by Functional Area Leads that FOLIO meets our [requirements](#).
- Confirmation by Functional Area Leads that FOLIO integrates properly with [existing internal and external applications](#).
- Confirmation that security review has been passed.
- Database containing correctly migrated data.
- Reports comparable to those produced by Voyager.
- LStools comparable to those used for Voyager.
- List of functions that are not in FOLIO but needed by CUL (as recorded in the [Issues Log](#).)
- Workflow changes as needed.
- Documentation specific to CUL.
- Training specific to CUL.

Project Exclusions

- Existing applications that interface with Voyager will not be replaced nor will new applications be introduced.
- Development of a new patron interface.
- Code customization of FOLIO.
- Development of additional functionality to FOLIO.

Project Assumptions

See [Assumptions and Constraints Log](#).

Project Constraints

See [Assumptions and Constraints Log](#).

Stakeholder Management Plan

See [Stakeholder Register](#) or [Integration List](#)

Identify Stakeholders

Early identification and communication with stakeholders is imperative to ensure the success of the implementation of FOLIO by gaining support and input for the project. Some stakeholders may have interests which may be positively or negatively affected by FOLIO. By initiating early and frequent communication and stakeholder management, we can more effectively manage and balance these interests while accomplishing all project tasks.

The FOLIO project team will conduct a brainstorming session in order to identify stakeholders for the project. First we will focus on stakeholders within CUL. This includes anyone with CUL who will be affected by the implementation of FOLIO, such as the functional managers who are supplying their staff for testing. Then we will focus on stakeholders outside of CUL. These will include both CU and non-CU stakeholders. Some CU examples include PeopleSoft and Bursar. Examples outside of CU include FOLIO partners, who in effect are our "suppliers."

The following criteria will be used to determine if an individual will be included as a stakeholder:

1. Will the person or their organization be directly or indirectly affected by this project?
2. Does the person or their organization hold a position from which they can influence the project?
3. Does the person have an impact on the project's resources (material, personnel, funding)?
4. Does the person or their organization have any special skills or capabilities the project will require?
5. Does the person potentially benefit from the project or are they in a position to resist this change?

Any individual who meets one or more of the above criteria will be identified as a stakeholder and added to the [Stakeholder Register](#). Stakeholders from the same organization will be grouped in order to simplify communication and stakeholder management.

Key Stakeholders

As a follow on to Identify Stakeholders, the project team will identify key stakeholders who have the most influence on the project or who may be impacted the most by it. These key stakeholders are those who also require the most communication and management. Once identified, the Project Manager will develop a plan to obtain their feedback on the level of participation they desire, frequency and type of communication, and any concerns or conflicting interests they have.

Based on the feedback gathered by the project manager, the determination may be made to involve key stakeholders on the project team or one of the sub-teams. Thorough communication with key stakeholders is necessary to ensure all concerns are identified and addressed and that resources for the project remain available.

Stakeholder Analysis

For those stakeholders not considered "key", the project team will analyze each of the other stakeholders. The purpose of this analysis is to plan the management approach for each stakeholder, and to determine the appropriate levels of communication and participation each stakeholder will have on the project.

Time Management Plan

See [Schedule Baseline](#), [Milestone List](#), or [Project Schedule](#)

Time/Schedule Management Approach

- The high-level [project schedule](#) will be created by the Project Manager using MS Project.
- The activities will be identified by project team members and from reviewing other similar projects.
- The draft activity estimates will be developed by the Project Manager with final approval by the people assigned to do the work.
- After a preliminary [project schedule](#) has been developed, it will be reviewed and approved by the project team.
- After the Project Sponsor has approved the schedule it will become the [schedule baseline](#).
- JIRA will be used by the project team to manage the detailed tasks for the project.
- The progress of the project will be tracked against the [schedule baseline](#).

Time/Schedule Control

- The [project schedule](#) will be reviewed and updated as necessary on a bi-weekly basis, with actual start date, actual end date, and completion percentages provided by the task owners.
- The Project Manager is responsible for the schedule updates/reviews, determining the impact of schedule variances, submitting schedule [change requests](#), and reporting status in accordance with the project's [Communication Management Plan](#).
- The project team is responsible for communicating any changes to actual start/finish dates to the Project Manager, and participating in schedule variance resolution activities as needed.
- The Project Sponsor will maintain awareness of the project schedule status and review/approve any schedule [change requests](#) submitted by the Project Manager.

ZZZ Archived Wiki Pages

- [Agile Approach to Development](#)
- [FOLIO Roadmap](#)
- [Integration List](#)
- [Issue Log](#)
- [Meeting Notes](#)
- [Meeting Notes - FOLIO Development Team \(through 08/13/2018\)](#)
- [Milestone List](#)
- [OLD Integrations Pages](#)
- [OLD Meeting Notes - CUL Team](#)
- [OLD Meeting Notes - Other](#)
- [OLD OLE Documentation](#)
- [OLD OLE Groups](#)
- [OLD Presentations Given By CUL Staff](#)
- [OLD Team Spaces](#)
- [Project Management Transition to Debra](#)
- [Project Schedule](#)
- [Test Plans](#)
- [Topics for Future Meetings](#)
- [User Documentation Plan](#)
- [User Training Plan](#)

Agile Approach to Development

Websites

[Agile Manifesto](#)

[Principles Behind the Agile Manifesto](#)

[Join the Agile Revolution](#)

[Agile Project Management for Dummies Cheat Sheet](#)

[The Ultimate Introduction To Agile Project Management](#)

[Agile Project Management](#)

[Scrum Alliance](#)

Courses

[Agile at Work Series \(at Lynda.com\)](#)

[Agile Project Management \(at Lynda.com\)](#)

[Transitioning from Waterfall to Agile Project Management \(at Lynda.com\)](#)

Videos


[Agile Project Management Tutorial \(from Lynda.com\)](#)

[Introduction to JIRA & Project Management](#)

[What is a "Product Owner"?](#)

[Agile Product Ownership in a Nutshell](#)

Files

File	Modified 
PDF File intro-to-agile-devel.pdf Intro by serena.com	Mar 02, 2016 by Holly L. Mistlebauer
Microsoft Powerpoint Presentation OLE Agile Workshop - Presentation.pptx Workshop at Kualu Days 2015	Mar 02, 2016 by Holly L. Mistlebauer
Microsoft Word Document Agileresources.docx Resources given to OLE Functional Council	Mar 02, 2016 by Holly L. Mistlebauer
PDF File AgileTestingOverview.pdf From Test Obsessed website	Mar 02, 2016 by Holly L. Mistlebauer
Microsoft Powerpoint Presentation Traditional vs Agile projects.pptx	Mar 04, 2016 by Holly L. Mistlebauer

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 [Download All](#)

FOLIO Roadmap

This is old! Harry is working on a new one for release in late November/December 2018!

Official FOLIO Roadmap

Official FOLIO 2018 (v1) Spreadsheet

File	Modified 
Microsoft Excel Spreadsheet FOLIO 2018 Release.xlsx Release details presented January 19, 2017	Jan 27, 2017 by Holly L. Mistlebauer
Microsoft Powerpoint Presentation FOLIO_Forum.pptx FOLIO Roadmap presented November 28, 2016--OLD	Jan 31, 2017 by Holly L. Mistlebauer
JPEG File FOLIO Plan 2016-2018.jpg	Apr 18, 2017 by Holly L. Mistlebauer

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Integration List

The current list is at [the CUL Implementation Project's Box site](#) .

Issue Log

See [Issue Management Plan](#)

Issue	Raised By	Date Raised	Impact on Objectives	Priority	Responsible Party	Target Resolution Date	Actions	Status	Resolved Date	Resolution	Comments
When should we turn off Classic Catalog?	Dean	11/2015 (day unknown)		Low		Summer 2020	Have turned off Classic Catalog for everyone except CUL staff				Do this before implementation so we can ensure that there aren't any functions needed by staff.
Simplify circ rules before moving to FOLIO	Holly	11/2015 (day unknown)		High? Medium? Low?	Deb	Spring 2020?					
Use a shared circ desk login or have individual logins?	Chris	11/2015 (day unknown)		High? Medium? Low?	Deb	Spring 2020?					
				High? Medium? Low?							
				High? Medium? Low?							
				High? Medium? Low?							
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				High? Medium? Low?							
				High? Medium? Low?							

Meeting Notes

Proposed Topics for Future Meetings

File

Modified 

No files shared here yet.

Drag and drop to upload or [browse for files](#)

Meeting Notes - FOLIO Development Team (through 08/13 /2018)

- [2018-08-13](#)
- [2018-07-30](#)
- [2018-06-18](#)
- [2018-05-21](#)
- [2018-04-09](#)
- [2018-03-12](#)
- [2018-02-12](#)
- [2018-01-29](#)
- [2017-12-04](#)
- [2017-11-06](#)
- [2017-10-09](#)
- [2017-09-11](#)
- [2017-08-14](#)
- [2017-07-31](#)
- [2017-06-19](#)
- [2017-05-22](#)
- [2017-05-08](#)
- [2017-04-10](#)
- [2017-03-27](#)
- [2017-03-13](#)
- [2017-02-27](#)
- [2017-02-13](#)
- [2017-01-30](#)
- [2017-01-13](#)

2017-01-13

Attendees

Deb, Matt, Alan, Ann, Jesse, Chris, Dean, Kizer, and Holly

Regrets: Naun, Frances

Discussion Items

Time	Item	Who	Notes	Actions
10:00	Announcements	Holly	Wiki updated to archive old OLE documents, meeting notes, etc.	
10:05	OLE Board Update	Dean	Board meeting right after this meeting. Actions for approval at meeting include MoU for partnership with OLF, hiring of two OLE developers, extending Mike Winker's contract for two years, and transferring money from Kualii. Waiting for IRS pre-approval of non-profit status. Product Council meeting at Duke next week. Had call with Product Council yesterday and cleared up some issues. Week after that OLE Board is meeting with EBSCO and Index Data in Boston. Will discuss many things including putting together a light weight project management team.	
10:15	Metadata Management SIG Update	Naun	Naun is out.	
	Resource Access SIG Update	Deb	Have met twice. Andrea from Duke is convener. Filling out a grid of expertise of expertise and experience. Added Wendy to group for Aries and Billing experience.	
	Resource Management SIG Update	Peter	Unable to attend.	
	User Management SIG Update	Chris	Going through spreadsheet of user metadata with Cate (EBSCO PM) to discuss how library would use data.	
	Product Council Update	Holly	F2F meeting next week in NC—includes Dean, Chris, Naun, and Holly.	
	Development Update	Holly	Hiring 2 OLE developers—Melon developers will be next.	
10:30	Managing Change	Holly	Chris and Holly will work together on FOLIO FIRST FRIDAYS, a monthly event where Dean will give an update and we will do demos, answer questions, etc.	Chris and Holly will plan this.
10:55	Anything else?	Anyone	Nothing.	

2017-01-30

Attendees

Jesse, Ann, Alan, Peter, Deb, Frances, Chris, Naun, Kizer, Matt, and Holly

Regrets: Dean

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	Roadmap has been added to wiki. Remind everyone to include others in SIG discussions.	Find bigger room.
12:10	OLE Board & Other Updates	Dean	Not in attendance.	
12:20	Metadata Management SIG Update	Naun	Nothing to report. Group hasn't reconvened. Doreen from Lehigh is chairing. Will review MVP requirements.	
	Resource Access SIG Update	Deb	Met. Andrea gave update from PC meeting in NC. Looked at German requirements plus spreadsheet. Filip showed rest of prototype. Filip would like to do small-group discussions on specific topics.	
	Resource Management SIG Update	Peter	Has been moving forward quite a bit. Has gotten to a uber workflow. Has been looking at 2018 release tasks. Have found some missing features. Small group meeting with Harry on Wednesday. Have talked about having two funding structures.	
	User Management SIG Update	Chris	Continuing to work on user metadata worksheet. Going through workflow for creating users. Are patrons and staff both users or are only patrons users?	
	Product Council Update	Holly /Naun /Chris /Dean	January 17-20 we met at Duke University for several days. This trip was paid for by the Mellon Grant. On the first day we met with The Republik (a marketing firm) to give them input to the re-branding of OLE. On the second day and morning of the third day, we included SIG conveners and Dean. Cornell had 4 people around the table. EBSCO and Index Data was also represented. We talked about PC business such as the Roadmap, the new PC Chair.	
	Development Update	Holly /Frances /Matt	Sprint 6 is finishing February 3 and Sprint 7 is starting February 6. We will know what was actually completed in Sprint 7 at the February 7 Sprint Review meeting. The SPD for the OLE developers positions has been forwarded to CUL HR for approval.	
12:45	FOLIO First Fridays and a new role for Chris	Holly /Chris	At the last meeting we talked about how we would manage the changes that will be impacting staff. When we left the meeting, Chris and Holly were going to work together on a monthly meeting for CUL staff. This will happen, but with Chris talking on a new role.	
12:55	Anything else?	Anyone	Holly plugged the FOLIO Forum on Wednesday.	

2017-02-13

Attendees

Kizer, Jesse, Ann, Peter, Deb, Frances, Matt, Chris, and Holly

Regrets: Dean, Naun

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Jesse has replaced Naun on Product Council. OLE Senior Developer positions were posted on Friday. Quarterly Roadmap Forums will now include demo of what was produced the last quarter—next one is March 15th. 	
12:10	OLE Board & Other Updates	Dean	Dean out today. Next board meeting in March.	
12:10	Metadata Management SIG Update	Naun	Naun plans to remain on Metadata Management SIG after he leaves CUL, but we need to find a CUL person to join this SIG.	Jesse, Jim, Adam, and others meeting this week to discuss.
		Deb	Sub-groups meeting with Filip. Loan policies and item status sub-groups have met so far. Chris and Deb have talked briefly about profiles.	
	Resource Management SIG Update	Peter	Hasn't met for the last two weeks. Sub-group has met to go through tab on Harry's V1 spreadsheet .	
	User Management SIG Update	Chris	<p>Finished first pass through first metadata spreadsheet. Going forward will do agenda-specific meetings. Went through tab on Harry's V1 spreadsheet.</p> <p>Added NOTES field that is time/data stamped. Can have more than one. Good approach for patron blocks as well—why was block instituted? Would have the history. Also went over user permissions, which are different from circ policies.</p>	
	Product Council Update	Holly /Jesse	Discussed on-boarding new institutions to OLE. Need to add new people to SIGs without starting all over again.	
	Development Update	Holly /Frances/Matt	<p>Sprint Review is held every 2 sprints—last one held on Tuesday, February 7th (see slides)</p> <ul style="list-style-type: none"> Search works as you type Columns sort if you click heading First attempt at filtering Evaluated tools for regression testing Made setup simpler Lots of "behind the scenes" work Recording available—usually demo 2-3 things 	Chris will check on searching for first letter with a full database. Not useful and will take time to complete.
12:45	FOLIO First Fridays	Chris	What did people say afterward? Format good? Eight responses to survey. People want to see Roadmap—what will be happening when.	
12:55	Anything else?	Anyone	Nothing.	

2017-02-27

Attendees

All

Regrets: None

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	March 15th is Roadmap Forum with demos. FOLIO First Fridays on March 3rd.	
12:10	OLE Board & Other Updates	Dean	Explain difference between OLE and OLF: Open Library Foundation is legal entity taking place of Kualii in old arrangement. We are getting 501c3 approval and then Cornell can sign an MOU with OLF. OLF has a credit card, bank account, etc. All funds remaining with Kualii moving to OLF account. OLF can potentially take on other projects. OLE is a project under OLF. Index Data code will belong to OLF. EBSCO will sign over code as well. VuFind and Code4Lib may join. OLE Partners consists of the group of partners. The money they pay is collected by OLF. OLE Partners are individually signing an agreement with the OLF. Also: Signing agreement for \$100,000 from EBSCO for grants to get new OLE partners on board. This allows us to expand the partnership.	
12:20	Metadata Management SIG Update	TBD	Who will replace Naun on this SIG? Long-term solution will most likely be a new hire. Will have short-term solution in the next few weeks.	
	Resource Access SIG Update	Deb	Met to talk about what should be in v1. Have been discussing item statuses. Looked at where user stories intersect. A few from the group listened in on User Management SIG discussion on permissions.	
	Resource Management SIG Update	Peter	RM SIG shows UI prototypes, etc. from ER&L open house April 12th Forum. Peter will not be at ER&L. Had call 10 days ago when Filip went through is ideas. Three days ago group went back over it. Peter was in Seattle on vacation so he was unable to attend. Won't be able to meet with SOAS when he is there due to holidays there.	
	User Management SIG Update	Chris	Deciding what should be suppressed in Circ App except if explicitly requested (e.g. faculty addresses). Similar to not showing what a staff member has checked out if staff member viewing another staff members user information.	
	Product Council Update	Holly /Jesse	Discussed time zone issue given OLE/FOLIO global; planning ALA presence; further review of v1 spreadsheet (with new SIGs).	
	Development Update	Holly /Frances/Matt	Status of posted positions. Matt working on UI for patron groups right now. Frances is working on something for Tech Innovation Work that could help in the future. Matt will be at Code4Lib next week.	
	Technical Review Team Round 2	Chris	First call was last Thursday. Discussed approach to re-engage. Michelle will start attending FOLIO Roundup meetings and Sprint Reviews.	
12:45	Anything else?	Anyone	OLE-FOLIO-OLF talk accepted at CNI. Will be April 3-4.	

2017-03-13

Attendees

Ann, Alan, Deb, Frances, Naun, Peter, Lydia, Matt, Kizer, Jesse, Chris, and Holly

Regrets: Dean

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Welcome Lydia! March 15th is Roadmap Forum with demos. Feedback about last FOLIO First Friday? Not highly attended at Mann (only 3 there and 12 remote), but was bitterly cold. Should get more for next one which will have demos. Next one is on March 31st. EBSCO will be at this one. 	<ul style="list-style-type: none"> Remind Kurt of DST.
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Board meeting tomorrow. Dean not at meeting. 	
12:20	It's raining SIGs!	Holly	<ul style="list-style-type: none"> New-ish: Internationalization Starting soon: Consortia, Reporting, Privacy Not started: Sys Ops & Mgt, Accessibility, and Security (now that it has been split from Privacy) Just announced: Selectors (off-shoot of Resource Management SIG)—will most likely be a small group that is an offshoot of RM SIG 	<ul style="list-style-type: none"> Peter will let RM SIG know that we want to add someone to Selectors group.
12:25	Reporting SIG Update	Lydia	<ul style="list-style-type: none"> Lydia convener and Joanne member. Charge has been submitted for PC review. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> Not started. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> Jesse has been listening in last two weeks. Xin will be naming several people to join up. 	
	Metadata Management SIG Update	Naun	<ul style="list-style-type: none"> Who will replace Naun on this SIG? Long-term solution will most likely be a new hire. Will have short-term solution in the next few weeks. Only one call in last three weeks. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Still talking about item statuses—some are informational and some cause action. As part of this put together a workflow spreadsheet. Talking about item type today—what is it? A material type or a loan type? Now meeting with Filip twice a week. 	
	Resource Management SIG Update	Peter	<ul style="list-style-type: none"> Last meeting looking at accounting issues and acquisition of resources. Fair amount of movement taking place. Looking at how to handle issues with resources (like how we use libit-I now). Should Ann attend? 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> "...it looks like the User Management SIG is likely to go dormant for a bit until the developers are ready for more input from us." 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> EBSCO will fund innovation grants of up to \$100,000 for libraries who want to develop apps for FOLIO. Aim is to spur excitement in community and new development efforts. EBSCO will be sending targeted email about challenge to developers email list — has about 600 recipients. Cate and Jakub will meet with Harry to look at V1 for resources and time for development and draft will be reviewed with PC and SIGs. 	
	Development Update	Holly /Frances/Matt	<ul style="list-style-type: none"> Optional meeting for developers. One phone interview—possible second. Top two candidates from NY. 	

			<ul style="list-style-type: none"> • Sprint review held March 7. 	
	Technical Review Team (Round 2)	Chris	<ul style="list-style-type: none"> • Didn't meet last week due to Code4Lib. • Will meet this week. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> • Ann asked what accounting were brought up in RM SIG. • Peter has questions about the FOLIO platform. 	<ul style="list-style-type: none"> • Ann will listen to recording and then let Holly know if she should join RM SIG.

2017-03-27

Attendees

Ann, Alan, Dean, Deb, Frances, Peter, Lydia, Matt, Jesse, and Holly

Regrets: Chris and Kizer

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Sorry for lack of recording of March 15th Roadmap Forum—content will be covered by FOLIO First Friday on March 31st. 	
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Waiting for Tech Review Team to give approval for Mellon Grant to move forward—hopefully two weeks from now. Dean and two others will be speaking at CNI next week. 	
12:20	SIG Updates	Holly	<ul style="list-style-type: none"> Should we add someone to new RM SIG Selectors task group? Should Ann join the RM SIG? Should someone from Cornell be on the Consortia SIG? 	<ul style="list-style-type: none"> Ask Kizer if he wants to sit in on a Selectors meeting. Ann will join RM group. Holly will facilitate this. O.k. not to be on Consortia SIG.
12:25	Reporting SIG Update	Lydia	<ul style="list-style-type: none"> Lydia convener and Joanne member. Charge to be approved by Product Council this week. 	
	Privacy SIG Update	Adam / Deb	<ul style="list-style-type: none"> Charge to be approved by Product Council this week. 	<ul style="list-style-type: none"> Send charge to Adam and Deb.
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus right now. Looked at how an interface needs to respond. Collected a list of people to consult from CUL. 	
	Metadata Management SIG Update	Naun	<ul style="list-style-type: none"> Who will replace Naun on this SIG? Long-term solution will most likely be a new hire. Will have short-term solution in the next few weeks. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Finished talking about Hold Shelves today. Don't need to keep meeting recordings. 	
	Resource Management SIG Update	Peter	<ul style="list-style-type: none"> Filip presented his ideas on invoices. Many things are important but don't need to be in V1. Filip showed an image of how he sees FOLIO scaling. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Not at meeting. 	
	Product Council Update	Holly / Jesse	<ul style="list-style-type: none"> Harry showed chart of start and completion of development of apps. Discussed steps for getting new SIGs up and going. Further discussion of on-boarding of new institutions. Include more libraries in getting word out about FOLIO. 	<ul style="list-style-type: none"> Holly will send a screen shot out. Send Dean dates for October EBSCO user group meeting.
	Development Update	Holly / Frances / Matt	<ul style="list-style-type: none"> Latest development efforts shown at March 15th FOLIO Forum. Have 22 applicants for two developer positions—scheduled on full interview and several phone interviews. 	
	Technical Review Team (Round 2)	Chris	<ul style="list-style-type: none"> Not at meeting. 	

12:55	Anything else?	Anyone		
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2017-04-10

Attendees

Ann, Alan, Chris, Dean, Deb, Frances, Jesse, Kizer, Lydia, and Holly

Regrets: Matt and Peter

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> March 15th Roadmap Forum is being recorded and will be available soon. June 14th will be next quarterly Roadmap Forum. How did last FOLIO First Friday go? Great! EBSCO will be at next one. 	
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Talked about FOLIO and Foundation at CNI. Focus on accessibility. 	
12:20	SIG Updates	Holly	<ul style="list-style-type: none"> No new SIGs in the works beyond Reporting, Privacy, and Consortia. April 26th Forum will be about SIGs. 	<ul style="list-style-type: none"> Send Lydia info about SIG Forum.
12:25	Reporting SIG Update	Lydia	<ul style="list-style-type: none"> Product Council approved the charge on April 6th. People are completing Doodle Poll right now. First meeting will be later this month. Do more recruiting at April 26th SIGs Forum. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> Adam and Deb reviewed and o.k.'d draft charge. Product Council approved charge on April 6th. Added Adam and Deb to charge as "Interested Participants." Peter Murray will set up a Doodle Poll. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> Inactive right now. 	
	Metadata Management SIG Update	Naun	<ul style="list-style-type: none"> Who will replace Naun on this SIG? Long-term solution will most likely be a new hire. Will have short-term solution in the next few weeks. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Deb will be RA SIG rep at April 26th Forum. Starting to work on workflow examples. Had discussion on loan rules—how is priority set? 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> Peter is out. Ann has joined SIG. Finished going over order types and material types. Filip demoed the ER&L demo. Filip needs to meet directly with invoice experts. 	
	RM Selection Task Group	Kizer	<ul style="list-style-type: none"> Kizer attended Thursday's meeting. Developer showed what was in progress—something like Poof. 	<ul style="list-style-type: none"> Get Poof (Adam Chandler) and WorldCat Select info to Index Data. Ives+ looking at selection tools.
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Dormant—waiting for Cate to come back to discuss Shibboleth integration. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> Sharon Wiles-Young of Lehigh is now Chair—Paula Sullenger of TAMU is now Vice-Chair. 	

			<ul style="list-style-type: none"> • Usual SIG, Forum Facilitator, and other updates. • Need to have a FOLIO demo site for people to try out FOLIO—Chris offered to set this up. 	
	Development Update	Holly /Frances/Matt	<ul style="list-style-type: none"> • One successful full interview (March 30/31) and three phone interviews last week. • Show results of last Sprint Review. 	
	Technical Review Team (Round 2)	Chris	<ul style="list-style-type: none"> • Had a call with Tim—clarified things. 	
12:55	Anything else?	Anyone		

2017-05-08

Attendees

Ann, Alan, Frances, Jesse, Kizer, Lydia, Matt, Peter, and Holly

Regrets: Dean, Deb, and Chris

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> EBSCO and Index Data attended last Friday's FOLIO First Friday. Only one FOLIO Forum this month—concern has been expressed about Forum focus on how to get involved and not on actual product—people want to see something. 	
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Dean is at Board meeting today and meeting with EBSCO and Index Data tomorrow. 	
12:20	SIG Updates	Holly	<ul style="list-style-type: none"> From April 12th email: <i>"When we first staffed the Resource Management SIG I expressed concern about how much the RM SIG encompassed and we decided to start with Peter and then add more people as needed. We recently added Ann to the RM SIG and Kizer to the RM Selection Task Group, but I am starting to wonder if we should add even more people. The RM SIG includes functions for acquiring and managing all types of materials. These functions include: fund structures, orders, receiving, payment, claims, licensing, access and authentication methods, maintenance, usage and other statistics, and other possible evaluation tools. Will Peter, Ann, and Kizer be able to cover these areas?"</i> From Jesse: There is a lot of expertise on the group. We don't need to cover every single area ourselves. We have been pulling in people as needed. If there is a reason to add more people in the future, we will. For example, pulling in the three invoice experts from Cornell. 	<ul style="list-style-type: none"> Holly will ask that developers show SIG progress being made. Also need to create and manage a vendor list. Holly will check v1 spreadsheet.
12:25	Reporting SIG Update	Lydia	<ul style="list-style-type: none"> In process of uploading sample reports in each functional area and detailing, in a master spreadsheet, details about these reports such as parameters used, frequency, etc. Need to evaluate reporting tools but don't appear to have technical people in the group. 	<ul style="list-style-type: none"> Lydia will talk to Peter Murray about evaluating report tools.
	Privacy SIG Update	Adam / Deb	<ul style="list-style-type: none"> No one in attendance. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	TBD	<ul style="list-style-type: none"> No representative from Cornell yet. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Deb not in attendance. 	
	Resource Management SIG Update	Peter / Ann	<ul style="list-style-type: none"> On 4/21, Vince Bareau (EBSCO) presented an overview of the current data structure proposal with regard to resource management. The group discussed potential changes and clarifications, and now intends to put together case studies that address how it would be applied. Kathryn Harnish then led discussion of her document regarding invoicing activities. Ann, plus Deb, Lisa, and Sandy, were on the call. The committee took a two-week hiatus for 4/28 and 5/5. On 5/12 Cat Boerema will present to joint Resource Management/Metadata Management group. Next invoicing discussion will be 5/19. Ann has notified Sandy, Deb, & Lisa about this update. 	<ul style="list-style-type: none"> Holly will set up room for Sandy, Deb, and Ann to attend May

				19th meeting.
	RM Selection Task Group	Adam /Kizer	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> The UM-SIG has been on hiatus for a while, but will be starting up again this week to talk with some new FOLIO people who are going to be working on requirements for bulk loading of users. 	
	Sys Ops & Mgt SIG	TBD	<ul style="list-style-type: none"> Meeting this week to write charge. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> Check out new welcome page at https://wiki.folio.org/--will help with on-boarding new people and entire institutions. Trying to target certain conferences. 	<ul style="list-style-type: none"> Holly will talk to developers about LITA.
	Development Update	Holly /Francis/Matt	<ul style="list-style-type: none"> Have made two offers--neither accepted yet. OLE developers headed to Dublin next week for Index Data developer face-2-face meeting. Sprint review is tomorrow. 	
	Technical Review Team (Round 2)	Chris	<ul style="list-style-type: none"> Our report has been submitted to the OLE Board. 	
12:55	Anything else?	Anyone		

2017-05-22

Attendees

Ann, Alan, Chris, Dean, Deb, Frances, Jesse, Kizer, Matt, Peter, and Holly

Regrets: Lydia

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Holly will be out May 24 - June 13, so we won't be meeting on June 5. Our next meeting will be June 19. 	
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> OLE Board accepted Tech Rev Report—platform is ready for development—passed this news on to Mellon—close to having approval from Mellon. Approved OLE business model and budget for next few years. Approved hiring UX/UI designer—position posted on Friday. 	
12:20	SIG Updates	Holly	<p>Action items from last meeting:</p> <ul style="list-style-type: none"> Holly will ask that developers show SIG progress being made. <i>This is being addressed by Cate.</i> Need to create and manage a vendor list. Holly will check v1 spreadsheet. <i>This is on the v1 spreadsheet under Acquisitions tab as required for v1. We are all set.</i> 	
12:25	Reporting SIG Update	Lydia	<p>Action item from last meeting:</p> <ul style="list-style-type: none"> Need to evaluate reporting tools but don't appear to have technical people in the group. Lydia was going to talk to Peter Murray about this. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> Have been working through V1 document. No meetings the last couple of weeks because of people's schedules, will start again this week. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	TBD	<ul style="list-style-type: none"> No representative from Cornell yet. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Working on loan rules with Filip right now. This needs to be finished by the end of the week. Number of locations (5) was discussed and agreed to. However, the RM SIG would like to discuss this to see if this could be simplified for their needs. More to come. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> 5/12 call was a joint RM/MM call, with Cate Boerma presenting information on the RM Data Domain model. Peter didn't attend the call because I was at ELUNA, but I watched the recording last week. Cate shared a lot of information about the structure, and a lot of changes were made in the week that followed as a result of the conversation. 5/19 call discussed Stacks, a company that will (likely) be stepping in to take some of the RM development work from Filip, who has too much right now. Invoicing was the main focus of the call. Filio needs to talk directly to the invoicing experts. 	<ul style="list-style-type: none"> Need to know what Stax is going to do?
	RM Selection Task Group	Adam /Kizer	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Didn't meet last week, but will meet this week. Looking at batch load. 	
	Sys Ops & Mgt SIG	Alan /Chris	<ul style="list-style-type: none"> Charge has been approved by Product Council. Need to advertise for members. Alan and Chris will represent Cornell. 	
	Product Council	Holly /Jesse		

	Update		<ul style="list-style-type: none"> • Planning an all-FOLIO meeting for the fall on the east coast. Date and location should be available in 2 weeks. If you have ideas for meeting sessions please document them here. 	
	Development Update	Holly /Frances/Matt	<ul style="list-style-type: none"> • Both developers have accepted our offers and start on June 1. • We are now starting a search for a Senior UX, UI, Interaction Designer. • OLE developers are back from Index Data Developer face-2-face meeting in Dublin. • Go to http://ux.folio.org/ to see prototypes. 	
	Technical Review Team (Round 2)	Chris	<ul style="list-style-type: none"> • Done 	
12:55	Anything else?	Anyone		

2017-06-19

Attendees

Ann, Alan, Chris, Dean, Deb, Frances, Kizer, Lydia, Matt, Peter, and Holly

Regrets: Jesse

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	None	
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Mellon funding fully approved—Duke moving ahead with hiring 4 developers plus strategic person. Republik marketing presentation tomorrow—may rename ourselves from OLE. Dean reviewed the video EBSCO took while they were here—will show at FFF. Another new OLE partner—haven't signed MOU yet. 	
12:20	SIG Updates	Holly	None	<ul style="list-style-type: none"> Send demo URL to group.
	Reporting SIG Update	Lydia	<p>Action item from last meeting:</p> <ul style="list-style-type: none"> Need to evaluate reporting tools but don't appear to have technical people in the group. Lydia was going to talk to Peter Murray about this. She just sent him an email about this. 	<ul style="list-style-type: none"> Next meeting is last meeting for Lydia.
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> Have had trouble finding time to meet—have some issues to look at for v1. May not have the right mix of people—may need people like Chris. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	TBD	<ul style="list-style-type: none"> No representative from Cornell yet. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Met with Cate today to work on requests for items out on loan. Discovering it is not as simple as people thought. Got request last week to work on Codex. 	
	Resource Management SIG Update	Peter /Ann	<p>Action item from last meeting:</p> <ul style="list-style-type: none"> Need to know what Stacks is going to do? They will focus on acquisitions. Mike feels very positive about them—appear to have same approach to design and development as Index Data. Intro to Stacks in June 9th meeting - Stacks has requested copies of current reports used within Acquisitions - as a means to evaluate the data they need to gather. Stacks also sent out a User experience survey to further gather information. Copies of reports were requested to be submitted by June 23rd. 	<ul style="list-style-type: none"> RM SIG concerned about Stacks starting over. Holly will talk to Mike about this. Codex issue is a major concern as well. KM and KW have a plan for addressing this.
	RM Selection Task Group	Adam /Kizer	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Working through authentication and authorization issues. 	
	Sys Ops & Mgt SIG	Alan /Chris	<ul style="list-style-type: none"> SIG is currently being shopped around for members. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> Planning ALA events. Starting to plan FOLIO-con. 	

	Development Update	Holly /Frances/Matt	<ul style="list-style-type: none">• Reorganization of core developers.• Zak and Michal started on June 1.	
12:55	Anything else?	Anyone	None	

2017-07-31

Attendees

Ann, Chris, Jesse, Kizer, Matt, Peter, and Holly

Regrets: Alan, Dean, Deb, Frances

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> None 	
12:10	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Dean out 	
12:20	Group Updates	Holly	<ul style="list-style-type: none"> Should we have a member on the Accessibility SIG? What about OLE Marketing Team? 	<ul style="list-style-type: none"> Holly will check with Zsuzsa.
	Accessibility SIG Update	Jesse	<ul style="list-style-type: none"> Jesse is Product Council representative. Hasn't met yet. 	<ul style="list-style-type: none"> Holly will see if Jenn is interested.
	Reporting SIG Update	TBD	<ul style="list-style-type: none"> What is status of hiring Lydia's replacement? Starting phone screens next week. Joanne is on SIG so CUL is covered. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> In last week's OLE Project Report, Peter Murray asked for introductions to partner's security officers. Jesse, did you put Peter in touch with Wyman Miles (head of the Cornell IT Security Office)? 	<ul style="list-style-type: none"> Jesse did not, so Chris will talk to Peter, see what he wants, then connect him with someone.
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Metadata Management SIG Update	TBD	<ul style="list-style-type: none"> No representative from Cornell yet. Update? Jason K. is Nan's replacement and will start on August 16. He will join the SIG or appoint someone else. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Deb is on vacation. Holly is meeting with RA SIG as a product own to define fees and fines. They are also work on requests. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> Took a slide backwards--not talking about specifics anymore. Talking about Stacks and Codex. 	<ul style="list-style-type: none"> Confusion about what is going into v 1--how does this get decided? We need approach to dealing with this type of situation. Where does Acquisitions start and stop? Holly will read last week's PC meeting notes. Holly will talk to Sharon.
	RM Selection Task Group	Adam /Kizer	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Codex Task Force	Peter	<ul style="list-style-type: none"> Special group started up to deal with data model. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Talking to developers from Qulto about script. Have proof-of-concept API--messy right now. 	
	Sys Ops & Mgt SIG	Alan /Chris	<ul style="list-style-type: none"> First meeting is on August 14th. 	

	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> • Still no info on location or dates of FOLIO Con--survey being sent to members of SIGS and PC. • Spent most of last meeting talking about Stacks. • EBSCO developers are working e-resource knowledge-base API--building vendor-neutral API for others to use. 	
	Development Update	Holly /Frances/Matt	<ul style="list-style-type: none"> • Holly working as Product Owner with Cate. • Interviewed two candidates last week for OLE UX/UI Designer position. • Updating Roadmap to reflect reality. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> • None 	

2017-08-14

Attendees

Chris, Deb, Kizer, Matt, Peter, and Holly

Regrets: Alan, Ann, Dean, France, and Jesse

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> None 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> None 	
12:10	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> All items completed. 	
12:15	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Jesse is Product Council liaison. Melissa is CUL representative. 	
	Reporting SIG Update	TBD	<ul style="list-style-type: none"> What is status of hiring Lydia's replacement? Moving from phone interviews to in-person interviews--have some good candidates. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> Tim and Dan from CU attended July 11th meeting. Very happy we reached out to them early. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Metadata Management SIG Update	Jason		
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Finished patron data display on checkout screen. Working in fines and fees--almost done with manual fines and fees. 	
	Resource Management SIG Update	Peter/Ann	<ul style="list-style-type: none"> Ann/Jesse worked on the Acquisitions part of the survey and Peter/Jesse were going to work on the RM portion and Peter will be submitting for Cornell. Survey was thoughtful and helpful--one per institution. Developers want RM SIG to start using Discuss more. 	
	RM Selection Task Group	Adam /Kizer	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	What is status of this? What is impact of Stacks work?
	Codex Task Force	Peter	<ul style="list-style-type: none"> Haven't met in a couple weeks. Meeting moved to MM SIG. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> First demo of Shibboleth sign on. 	
	Sys Ops & Mgt SIG	Alan /Chris /Holly	<ul style="list-style-type: none"> First meeting this morning. Talked about the scope of the SIG, our initial targets, etc. Dev team rep missing, so conversation was hindered. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> Update on FOLIO Con? Nothing new. 	
	Development	Holly		

	Update	/Frances /Matt	<ul style="list-style-type: none"> • New OLE UX/UI Designer position. • Status of Mellon developer search. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> • New team. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> • Issue of LS Tools was raised by TS–Holly is meeting with Chris and Adam this afternoon to learn more about LS Tools. 	

2017-09-11

Attendees

Ann, Chris, Dean, Deb, Jason, Matt, Peter, and Holly

Regrets: Frances, Jesse, and Kizer

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> None. 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Stakeholders meeting went well. Dean missed meetings so needs to get details from Mike. Library of Congress interested in learning more about FOLIO. Seb, Dean, etc. visiting in October. It's a long shot, but you never know. 	
12:10	Action Items from Last Meeting	Holly		
12:15	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Small group ironed out charge—whole SIG hasn't met yet. Schedule SIG meeting soon. Have some tweaks to the charge for the Product Council. 	
	Reporting SIG Update	TBD	<ul style="list-style-type: none"> What is status of hiring Lydia's replacement? Doing reference checks and hope to extend offer this week. Joanne is on SIG also. 	
	Privacy SIG Update	Adam/Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Has attended one meeting so far. Batch processing issue raised—didn't bring up LS Tools. Someone at EBSCO contacted Jason about getting some example data. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> September 27th FOLIO Forum topic. Working on creation of manual fees and fines. Had presentation on Codex. Two EBSCO folks coming to Cornell to learn about Access Services. 	
	Resource Management SIG Update	Peter/Ann	<ul style="list-style-type: none"> Survey results https://drive.google.com/drive/folders/0Bw-o65fb9EKTbUxfTzVydFpkYVE Ask at meeting where Stacks work stops/begins in SIG—Product Council is also addressing this for various groups. 	
	RM Selection Task Group	Adam/Kizer	<ul style="list-style-type: none"> Not an ongoing group. 	
	Codex Task Force	Peter	<ul style="list-style-type: none"> Topic moved to MM SIG. 	
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Reviewing wireframes that include user information. Discussed consortial extensions. Possibly split this SIG's charge into RA SIG and SYS OPS SIG? Chris will bring up at PC. 	
	Sys Ops & Mgt SIG	Alan/Chris /Holly	<ul style="list-style-type: none"> Alan has left, so SIG needs a new convener. Call this the Systems Librarian SIG? Update charge to explain the type of people who should be on SIG. 	

	Product Council Update	Holly/Jesse	<ul style="list-style-type: none"> • FOLIO Con moved to early 2018. • Convener of each SIG will attend PC meeting once a month. • Product Council has Strategic Team to quickly address issues that come up (Sharon, Harry, Peter, Paula, Kristin, Mike). • Harry reviewed the RM SIG survey results. • Focusing on communication within FOLIO community and outside. 	
	Development Update	Holly /Frances /Matt	<ul style="list-style-type: none"> • Darcy will be .5 FTE OLE UX/UI Designer. • Mellon search in progress;2-3 good candidates so far. • September 18-20 is developer meeting in Montreal. • Starting new FOLIO development team. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> • New team. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> • None 	

2017-10-09

Attendees

Ann, Chris, Dean, Jason, Jesse, Matt, Peter, Sharon, and Holly

Regrets: Deb, Frances, and Kizer

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Welcome to Sharon Beltaine! 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Talking to Library of Congress about FOLIO October 23 and 24. 	
12:10	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> None. 	
12:15	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Group has met—looked over tab on v1 spreadsheet. What standard level should developers be working on? Melissa explained the levels—we are aiming for AA compliance, which is the EU requirement effective 2020. Talked about CUL usability group and Colorado accessibility lab. Will be meeting first Wednesday of the month going forward. 	
	Reporting SIG Update	Sharon	<ul style="list-style-type: none"> Sharon will take over as SIG convener in mid-November, when current convener (Ingolf Kuss) takes over Sys Ops & Mgt SIG. Sharon attended meeting this morning—group is gathering reporting needs, business requirements. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Superficially discussing a variety of things and starting to take a deeper dive. Took a look at the inventory app—pretty slick. Started addressing metadata editing requirement—looking into integrating @cult (Italian product) plus MarcEdit. Discussed batch processes, which Jason brought Adam in on. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Two EBSCO folks visited Cornell to learn about Access Services on October 5 & 6. Working on fees/fines, checkout, proxies, requests, loan history, etc. 	
	Resource Management SIG Update	Peter/Ann	<ul style="list-style-type: none"> Not focused at this point—would be best to see designs before meeting and then discuss what should be changed. E-holdings sub-group is a positive development. 	Ann will email Kristin.
	User Management SIG Update	Chris	<ul style="list-style-type: none"> Discussed if UM SIG is still needed—many people absent so didn't discuss. More work has come up so group is still active. 	
	Sys Ops & Mgt SIG	Chris /Holly	<ul style="list-style-type: none"> Alan has left, so SIG needs a new convener—Ingolf Kuss will take over as convener in mid-November. We have added 5 new library reps. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> FOLIO Con moved to early 2018—week of January 22nd appears to be time, but location is still in the works. Product Council has identified an Executive Team to quickly address issues that come up (PC Chair, PC Co-Chair, Lead Product Owner, Lead Developer, and Roadmap Manager). 	

			<ul style="list-style-type: none"> • Looked over draft charge for the Executive Team. 	
	Development Update	Holly /Frances /Matt	<ul style="list-style-type: none"> • OLE added 3 more 0.5 FTEs to the core team (1 each from Auburn, TAMU, and Colorado). • Mellon search in progress—bringing in 5 candidates for full interviews over next 2 weeks. • September 18-20 developer meeting held in Montreal—next one will be week of January 22nd in conjunction with FOLIO Con. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> • Nothing to report. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> • Jesse - presenting at FOLIO Days Wednesday and Thursday and participating in NE SLA Friday. 	

2017-11-06

Attendees

Ann, Chris, Darcy, Dean, Deb, Jason, Kizer, Matt, Peter, Sharon, and Holly

Regrets: Frances, Jesse

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Darcy is joining us—she is a .5 FTE UX/UI Designer on FOLIO. 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> OLE Board meeting tomorrow—will be discussing what OLE libraries need to implement that is not included with what EBSCO needs for their hosted solution. Mid-December is next stakeholder meeting in D.C. 	
12:10	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> None. 	
12:15	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> No update this week. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> Reviewed Reporting Milestones document presented by Katalin Lovagne Szucs (PO), which gives an overview of the Reporting Tool solution development plan from Qulto; indicates that work on the Reporting Tool starts 11/6/17 with plan to deliver a solution in 6 months (by May 2018). Discussed lack of clear Reporting scope and decided to continue defining business requirements broadly for now. Reporting SIG is collaborating with Resource Management SIG on defining requirements for Acquisitions Reporting Codes. Discussed MARC fields; all MARC fields are needed in Reporting tool; MARC Field subgroup will meet to determine how to capture local MARC field business requirements. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Walked through atCult cataloging tool. Walked thru inventory UX—not sure about editing. Instance and holdings mapping sub-group has been formed. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Met with UM SIG to discuss patron records—planning to meet with them again. Working on open fee/fine screen, request types (hold and recall) and check out screens. Deb joined the calendar sub-group which will begin this week. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> Acquisitions group presented some Fund screens, this will be posted on Discuss for further comments. eHoldings sub-group has met once—Peter is on the group. Have addressed lack of focus issues for SIG. 	
	User Management SIG Update	Chris (convenor)	<ul style="list-style-type: none"> Joint meeting with RA SIG (mentioned above). Not much else going on—need update on bulk load and single sign on. 	
	Sys Ops & Mgt SIG	Chris /Holly	<ul style="list-style-type: none"> Ingolf Kuss will take over as convenor in mid-November. Next meeting scheduled for December 7. 	

	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> FOLIO Con date and location still in the works—original plan to combine FOLIO developers meeting with FOLIO Con has been shelved for now. 	When should SIG conveners attend since this week's meeting is cancelled?
	Development Update	Holly /Frances/Matt /Darcy	<ul style="list-style-type: none"> Mellon developer search in progress: <ul style="list-style-type: none"> Brought in 4 developers last month—hired one and two others still under consideration. Have a phone interview next week. Rewrote ad and re-posting it. FOLIO developers meeting will be January 22-24 with location TBD. Matt has been working on requests. Darcy has been focused on filters and fees/fines plus global navigation. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> Marketing firm will present to the team draft logos and marketing strategy in a couple of weeks. 11/6/17 - no news, still waiting for marketing firm presentation. And to clarify, the marketing team focuses only on promoting the OLE partnership, not FOLIO. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> Jesse - how did presentations go? He is out. 	

2017-12-04

Attendees

Chris, Darcy, Dean, Deb, Jesse, Kizer, Matt, Melissa, Peter, Sharon, and Holly

Regrets: Ann, Frances, Jason

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> FOLIO Con date and location still up in the air. Ginny Boyer is new OLE strategist. 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> OLE board meeting next Tuesday—looking at the budget and planning the FOLIO Stakeholder meeting in D.C. December 14. At Stakeholder meeting want to look at plans beyond v1 Roadmap. 	
12:15	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> "When should SIG conveners attend Product Council meeting this month since this week's meeting is cancelled?" SIG conveners are welcome to join any and all Product Council meetings. 	
12:20	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> There was a meeting in October that Jesse updated on us. November's meeting was cancelled. The December meeting is Wednesday. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> Looking at technical architecture plans. Encourages everyone to look at recorded presentation by Peter Murray (link on Reporting wiki). Will use add-on applications for reporting. Info that used to be reported will now be presented within an app. Reaching out to SIGs for subject matter expertise. Science Team has reports they would like to have available from FOLIO—Michael Cook is Chair of group. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Jason is out today. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Reporting SIG: Joanne Leary is on and will act as our connection. RA SIG members to review spreadsheet of reports Hold Requests: Working with Tania on hold requests which includes making requests, what happens when request is filled and what happens if it isn't. Fines/Fees: Displays for open and closed manual fine/fees fun with Holly! 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> The discuss post of the fund screen has been shared with Ken Putnam and Kizer Walker. Focus on Inventory app—subgroup working on this. Peter isn't on this subgroup. Peter attending meeting on e-holdings app status meeting—it is doing a lot of unnecessary work. We are helping EBSCO make sure their product works. This work will probably help with other products. Not a huge time sink. Peter will be in the UK January-April—he will attend our meetings remotely. 	
	User Management SIG Update	Chris (convenor)	<ul style="list-style-type: none"> Nothing happening lately. Need to setup a joint meeting with the RA SIG. 	

	Sys Ops & Mgt SIG	Chris /Holly	<ul style="list-style-type: none"> • Ingolf Kuss has taken over as convener. • Next meeting scheduled for December 7. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> • Discussed issue related to the Reporting SIG. • Holly created FOLIO Developer Directory, which is available here. • Jesse is evaluating browsers–Safari, Chrome, and Firefox enough? What about IE? Edge? Check with Amy B.? Developers are only testing in Chrome. • Holly added FOLIO Development Process to the wiki as well. 	
	Development Update	Holly /Frances/Matt /Darcy	<ul style="list-style-type: none"> • Mellon developer search in progress: <ul style="list-style-type: none"> • One position is filled with a developer starting December 18. • Had a phone interview this morning. • Have a full interview tomorrow. • Just received two more resumes. • FOLIO developers meeting will be January 22-24 with location still TBD. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> • No update. 	
12:50	Anything else?	Anyone	<ul style="list-style-type: none"> • Jesse - how did presentations go? Two for FOLIO Days. Covered what FOLIO means to our institution. Well received. 20-25 other libraries represented across the 2 sessions. Other presentation at New England ARL. Was a short panel with Harry and one other EBSCO person. Talked about innovation and how to drive it in libraries. Went well. • Deb going on phased retirement starting January 2–20 hours per week. Last day is September 2019. • Sharon mentioned that people at new employee meeting with Gerald had questions about FOLIO and how they can become involved. Gerald mentioned FOLIO First Fridays. 	Holly will send email to CU-LIB explaining how to become involved in FOLIO.

2018-01-29

Attendees

Ann, Chris, Darcy, Dean, Deb, Frances, Holly, Jason, Jesse, Peter, Sharon

Regrets: Kizer, Matt, Melissa

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> FOLIO Con scheduled for May 7-10 at Duke--will be combined with FOLIO developer meeting. On March 1st Holly is participating in a FOLIO Meetup at James Madison University in Harrisonburg, Virginia--she will cover FOLIO community and technical aspects plus do a demo. 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> No new updates. 	
12:15	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> Holly will send email to CU-LIB explaining how to become involved in FOLIO. 	<ul style="list-style-type: none"> Holly will send email to CU-LIB explaining how to become involved in FOLIO.
12:20	Updates from FOLIO Developers Meeting	Matt /Frances /Darcy/ Sharon /Peter	<ul style="list-style-type: none"> OLE sent 22 people, including developers, product owners, a UX designer, SIG conveners, and Product Council Chair--60 people all together. Held in Madrid, Spain. Made a lot of progress--able to make decisions because of SIG presence. Porting a cataloging module from at-CULT into FOLIO rather than developing an entirely new one from scratch. Mike is recommending Frances to work on ERM module--will talk to Dean. German network is discussing working on the ERM module. Got updates on system design book--needed this earlier, but better late than never. Location discussion got heated--need to see it in working form. Filip did presentation on Roadmap--what will be included in beta. Includes resizing, contrast, etc. What about customizing that is displayed in tables? Stacks in working on this for their own app. Others agree this is something that needs to be implemented across applications. Being looked into. UX/PO breakout discussion about filtered list--notes are consolidated in one location. John Law assigned people to summarize the next steps for each area--due today. Major shift in Reporting--there were two sessions focused on reporting. Three kinds: in-app, cross-app, and cross-system. Reporting 1 was about in-app reporting. Discussed visualization tools, consistency across apps, gap in reporting, need for PO, etc. Reporting 2 was focused on external reporting. Bottom line is we need access to our data. Jeremy started working on something that could work. Mostly developers so lots of techie talk, but there were opportunities to provide feedback. Learned about the Codex and how it will work, which was helpful. Overall meeting people and communicating with various folks was very helpful. Wednesday afternoon Peter had meeting with K-Int, Germany, Mike, etc. to discuss ERM. Assigned people are document the next steps here. 	<ul style="list-style-type: none"> Holly will ask Mike about assignment for Frances. Darcy will send us the summary of next steps from Madrid.-- next steps being documented at https://docs.google.com/spreadsheets/d/1vBdA30TLMs-BwR1c5nTOHkP9uVTwl691f9ysLw8_9IE/edit#gid=640132781
12:40	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Will start meeting again in February. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> See notes above from Madrid meeting. Helpful to get day 1 overview at Madrid meeting. Only so much can be covered at SIG meetings--will need to rely more on Discuss. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Metadata Management SIG Update	Jason		
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Access services local implementation team is Deb, Wendy Wilcox, Tobi Hines, Areal Scotese, Caitlin Finlay and Cammie Wyckoff. Input will also be given by the Access Services Committee. There will be a joint meeting with the Metadata Management SIG on Wednesday 1/31 to discuss resources and format issues. Deb will be there as well as Andrea Loigman. We have been working on request screens, cancellations of requests, check in screen and proxy screens. We started the discussion of the locations hierarchy. We have many questions about collections (not necessarily housed together) and physical locations and how these interact with loan rules. A spirited conversation was had and it was agreed that this is difficult to suss out in abstract form. We would like to see concrete examples in a testing environment. Another major issue for us is NCIP - if locations do not talk to NCIP software outside of Folio (like Borrow Direct) there will be no communication and loan rules will not function as they should. Vince is assigned to this and Cate will check for us. A reserves sub group will be formed. While a full on reserve app is not in V1, there are temp locations and item types that need to be thought through. Members are assigned to look through the Reports spreadsheet to see what (if anything) is missing. 	
	Resource Management SIG Update	Peter /Ann		

	User Management SIG Update	Chris (convenor)		
	Sys Ops & Mgt SIG	Chris	<ul style="list-style-type: none"> Created sub-group to focus on data migration--will work with SIGs depending on data. 	
	Product Council Update	Holly /Jesse		
	Development Update	Holly /Frances /Matt /Darcy	<ul style="list-style-type: none"> Mellon developer search finished <ul style="list-style-type: none"> One senior developer started December 18. Second senior developer started January 16. Junior developer starts February 12. Won't fill fourth position. FOLIO developers meeting held January 22-24 in Madrid--Sharon, Peter, Darcy, Matt, and Frances attended from Cornell (plus Michal and Zak, who officially work for Cornell but are paid by OLE). 	
	Marketing Team	Zsuzsa		
12:50	Anything else?	Anyone	<ul style="list-style-type: none"> Start planning implementation--this team needs to switch gears. 	<ul style="list-style-type: none"> Holly will meet with Chris this week about this.

2018-02-12

Attendees

Ann, Chris, Darcy, Dean, Deb, Frances, Holly, Jason, Matt, Sharon

Regrets: Melissa, Jesse, Kizer, Peter

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Next FOLIO Forums are - <ul style="list-style-type: none"> Feb 21st: Open source panel. March 7th: Roadmap update and demo (Harry and developer TBD). FOLIO now has a Google spreadsheet listing who is willing and able to present on which FOLIO topics—so far only Jesse and Holly from CUL are on it. 	
12:00	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> None. 	
12:10	Action Items from Last Meeting	Holly	<p>Holly will send email to CU-LIB explaining how to become involved in FOLIO.</p> <p>Draft (send to team for review late Friday):</p> <p>Dear CUL,</p> <p>As most of you know, CUL is planning to implement FOLIO as our new Integrated Library System (ILS) in July of 2019. We currently have CUL staff members involved in the development of FOLIO, as subject matter experts, product owners, designers, and developers. As the implementation date approaches, many more CUL staff members will become involved in testing and training activities. In the meantime, I have become aware that there are staff members who want to become more knowledgeable about and/or more involved with FOLIO. The purpose of this email is to offer you various options for engaging with FOLIO, depending on how much time you have available.</p> <p>To learn about FOLIO at a very high-level...</p> <ul style="list-style-type: none"> Attend a CUL FOLIO Friday or watch the recording if you miss the meeting—these meetings are announced by Chris Manly on cu-lib Invite Chris Manly to speak at a department meeting about FOLIO <p>To learn a bit more about what is happening...</p> <ul style="list-style-type: none"> Sign up to receive the monthly <i>FOLIO News Bits</i> via email at https://www.folio.org/community/#newsletter Sign up for the "ole" e-list at https://ole-lists.openlibraryfoundation.org/ to receive the OLE weekly project report, which includes information about Special Interest Group (SIG) activities, upcoming FOLIO Forums, etc. <p>To get even more involved...</p> <ul style="list-style-type: none"> Contact a CUL OLE/FOLIO Project Team member (listed here) in your department to find out from them how you can be more engaged Attend FOLIO Forums of interest, which are announced in the OLE weekly project report and <i>FOLIO News Bits</i> plus at https://www.openlibraryenvironment.org/archives/category/olforum (the same page has links to recordings of previous FOLIO Forums) Check out the CUL wiki at https://confluence.cornell.edu/display/OLE for CUL OLE/FOLIO meetings notes, a link for reporting anonymous questions, etc. Check out the FOLIO wiki at https://wiki.folio.org/ for information about Special Interest Group (SIGS), links to important documents, meeting notes, etc. <p>If you have any questions or concerns, please feel free to contact me.</p> <p>Best regards,</p> <p>Holly</p>	<ul style="list-style-type: none"> Chris will send Holly a link to the recordings. Holly will then send out email to CU-LIB.
			<p>Darcy will send us the summary of next steps from Madrid.— next steps being documented at https://docs.google.com/spreadsheets/d/1vBdA30TLMs-BwR1c5nTOHKp9uVTw691fgysLw8_9lE/edit#gid=640132781.</p> <p>Also:</p> <ul style="list-style-type: none"> Peter Murray put together a meeting summary slide deck at https://docs.google.com/presentation/d/1CRbOVJFZSrOVOVUzYfSmpOtlWfupx_gOvhea17YVaM/edit#slide=id.p There is a Google folder containing notes, etc. at https://drive.google.com/drive/folders/1T1qyF19Gh7e7QXobmwMxvEvyjF5C5UcJ 	
			<p>Holly will ask Mike about assignment for Frances. (I learned that at Madrid Mike has spoken to Frances about working on the ERM project being led by Knowledge Integration and the German OLE partners. This was news to me.)</p> <p>Follow-up:</p> <p>I learned from Mike Winkler that Mark Deutsch (a new OLE Mellon Grant developer) and Frances have both been slated to work on the ERM effort.</p> <p>The ERM development team will consist of:</p> <ul style="list-style-type: none"> 4.0 FTE developers 1.0 FTE product owner 0.5 FTE UX designer <p>With regard to the developers, some of the 4.0 FTEs are from OLE:</p> <ul style="list-style-type: none"> Mark 1.0 FTE Frances 0.5 FTE Julian 0.5 FTE (but also still working 0.5 FTE on Core Team) Alfons 0.35 FTE ((but also still working 0.5 FTE on Core Team) <p>This effort will probably start later this month, but is really dependent on when GBV and Knowledge Integration are ready to go.</p> <p>If you want more information, I am aware of two documents:</p> <ul style="list-style-type: none"> ERM Proposal at https://docs.google.com/document/d/1Wma7Jdtx-Q2yciOg9f03-fln9UYAYpA4kovov5dcNqQ/edit ERM Presentation at https://drive.google.com/file/d/1k-9zJAM9sjtVrcXrVzYbXxGPMaZkZ321/view 	

			<p>Holly will meet with Chris this week about this (start planning implementation--this team needs to switch gears).</p> <p>Status:</p> <ul style="list-style-type: none"> Holly met with Chris and they devised a plan. Will form implementation team with Chicago and TAMU, who are both committed to implementing Summer 2019. Will open implementation team to other OLE librarians who meet certain criteria (committed to Summer 2019 implementation, able to do equal share of work, etc.). Meeting with Chicago and TAMU tomorrow to create draft of criteria and discuss steps going forward. Hope to get ideas from TAMU and Chicago as to the membership and structure of CUL's implementation team--Chicago migrated to OLE not that long ago so they should be a good source of info. Will bring ideas back to this group for discussion and decision making. Have blessing from OLE Board, Mike Winkler, and Product Council Chair--still need to discuss with Sys Ops & Mgt SIG. This implementation team will be driving the implementation process and creating the documentation. Don't share this information yet--criteria needs to be approved and then sent out to other institutions. CUL may need to contract for outside support. 	
12:30	FOLIO Fridays	Chris	<ul style="list-style-type: none"> Would like to get other people presenting. Sprint Review tomorrow will provide more new features to demo. Sharon can talk about reporting at the next one. Darcy could talk about design principles--sorting any table column, selecting columns to display, etc. Darcy and Holly have offered to help with demos. 	
12:40	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Will start meeting again in February. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> No product owner has been assigned. Reporting SIG working with developers on data link proof of concept. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<i>Holly added updates but must not have saved them...</i>	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Forming sub groups on a variety of topics to enable us to move a bit faster on pressing issue. Reserves, notifications, printing slips, overrides and permissions and fees/fines are the topics for discussion. 3 of us (including me) are meeting with MM SIG on resource and format type. This will have an impact of loan rules. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> Kirstin Kemner-Heek gave an overview of ERM proposal. Kristen Wilson gave an update on GoKB (Global Open Knowledgebase) Stacks followed up on some discuss posts to get some further clarifications, Invoice processing Anne Marie shared the Tags discussion from the Madrid meeting https://docs.google.com/document/d/1wQSF2oBQ_yiGZCRIZ4pxss65ldSz9WwGYv78vXWW5A4/edit?usp=sharing 	
	User Management SIG Update	Chris (convenor)	<ul style="list-style-type: none"> On hiatus. 	
	Sys Ops & Mgt SIG	Chris	<ul style="list-style-type: none"> We have been reviewing information/feedback/questions that came out of the Madrid DevOps breakouts. Wayne Schneider has been walking through an install of FOLIO as a demo. 	
	Product Council Update	Holly /Jesse	<ul style="list-style-type: none"> Reviewed and approved plan for ERM project. Saw summary presentation on Madrid developer meeting. Discussed ALA Mid-winter plans for FOLIO. Shared information. 	
	Development Update	Holly /Frances /Matt /Darcy	<ul style="list-style-type: none"> No updates. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> No updates. 	
12:55	Anything else?	Anyone	<ul style="list-style-type: none"> Nothing. 	

2018-03-12

Attendees

Ann, Chris, Darcy, Dean, Deb, Frances, Holly, Jesse, Kizer, Matt, Melissa, Peter, Sharon

Regrets: Jason

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> WOLFCon will be held May 7-11 in Durham, NC—official announcement should be made soon. If you missed FOLIO Forum on March 7, recommend that you watch recording. 	
12:00	OLE Board & Other Updates	Dean		
12:10	Action Items from Last Meeting	Holly	<p>Holly will send email to CU-LIB explaining how to become involved in FOLIO.</p> <ul style="list-style-type: none"> Chris will send Holly a link to the recordings.--COMPLETED Holly will then send out email to CU-LIB.--COMPLETED 	
12:40	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Doing first tests—due Wednesday. Working with Rebecca Utz on keyboard tests. 	
	Reporting SIG Update	Sharon (convener)	<ul style="list-style-type: none"> Still need PO. Chris C. from Lehigh used BIRT to create first report. Need to learn more about working with data structure. Next looking at open source reporting tools. Need a more robust test environment. Rep to Tags sub-group is Simona. 	<ul style="list-style-type: none"> Holly will check with Mike about PO.
	Privacy SIG Update	Adam/Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Jason is out. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> We have split off into several subgroups: Wendy is on reserves, Michelle Hubbell is on fees/fines, Tom Trutt is on printing slips, Joanne is on requests and I am on loans. We have once again begun meeting as a group with the sub groups reporting back. 	
	Resource Management SIG Update	Peter/Ann	<ul style="list-style-type: none"> Discussion from Madrid about Tags being it's own app has evolved into a Tags sub group - Ann Marie Breaux will be leading, Home will be RM SIG but other apps can use it - will span all apps. Tags will be used to organize data and will help with filtering and reporting. Can be both structured or open depending on need. Will be flexible and allow for future innovation. Tags should not drive functionality. Individual organization will impose structure. ERM Subgroup organized by Kirstin (GBV) is starting soon. Peter is participating in this group. Fiscal Year rollover walk through - Initially things look very manual, Dennis Bridges expressed that you should be able to upload or export data. Waiting to see this come up in Discuss. Dennis Bridges also brought up - Subscription to proto.io (prototype application) may be cancelled so prototypes may be moving to another place. Reasoning - it's clunky and slow for designers. It could break a lot of links from discuss posts/presentations/etc. 	
	User Management SIG Update	Chris (convener)	<ul style="list-style-type: none"> Spinning up again this week—dusting off bulk user import. User acceptance testing of users app. 	
	Sys Ops & Mgt SIG	Chris	<ul style="list-style-type: none"> Went through issues of operational deployment—Wayne walked through deployment with SIG. Data migration sub-group has been looking at what it will take to migrate data out of existing systems—what maps and what doesn't. 	
	Product Council Update	Jesse /Holly	<ul style="list-style-type: none"> Place for people to suggest apps or ask questions about functionality. People could vote/comment. Could be taken on by Core team or other developers. Discussed Reporting SIG's work—need for Product Owner. 	
	Development Update	Holly /Frances /Matt /Darcy	<ul style="list-style-type: none"> Frances met with ERM group before this meeting—looking at how this work fits in with what has been done and is being worked on. Darcy's check-in screen in last sprint and working as PO on print slips and patron notices. 	

			<ul style="list-style-type: none"> Holly is still working on fees/fines and patron blocks. Demo site will be updated shortly for requests. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> Not in attendance. 	
	Implementation Planning Team Update	Holly/Chris	<ul style="list-style-type: none"> Still waiting for OLE Steering Committee to approve membership criteria—after that will announce group, establish wiki presence, etc. Created first draft of task list using model from U Chicago—after we review it with cohorts need to turn it into a plan. After that we need to define roles at CUL and determine who will fill them. 	
12:55	Anything else?	Jesse	<ul style="list-style-type: none"> TS group meeting later this month to discuss what happens when Jim L. leaves, what roles people will take on, etc. 	
		Sharon	<ul style="list-style-type: none"> Ann and Sharon met with Greg and Michael about FOLIO acquisitions and reporting. 	

2018-04-09

Attendees

Darcy, Deb, Frances, Holly, Jesse, Kizer, Matt, Melissa, Sharon

Regrets: Chris, Darcy, Dean, Jason, Peter

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Stable FOLIO demo site at http://folio-snapshot-stable.aws.indexdata.com. Beta release scheduled for July has been split into three releases: Beta 1 (July), Beta 2 (Sept) and Beta 3 (Dec). Cornell will look at status of FOLIO in October to make decision about summer 2019 implementation. 	
12:01	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Dean is at CNI. 	
12:05	WOLFcon Updates	Holly	<ul style="list-style-type: none"> We need to send CUL people on development team, our PC representative, CUL people who are SIG conveners, and then one CUL person from each functional area SIG where CUL person isn't convener. We are sending Dean (OLE Board Chair), Jesse (PC Rep), Chris (UM SIG Convener + Sys Ops and Mgt SIG rep), Sharon (Rpt SIG Convener), Matt (Dev), Frances (Dev), Holly (PO), Darcy (PO/UX Designer), Peter (RM SIG LTS Rep), Ann (RM SIG Fin Rep), Jason Kovari (MM SIG Rep), Deb Lamb (RA SIG & Privacy SIG Rep). OLE is paying for Holly and Darcy to attend (given they are OLE "employees") and CUL is paying for other 10 attendees. Other folks from CUL who want to attend are welcome, but will need to be supported by department funds. The schedule is still a work in progress. The master schedule is here. There will be a website available soon. Possible SIG topics are being collected here. The final topics will be selected from this list. If you aren't a developer/PO or on the OLE Board/PC, you don't need to arrive until Monday, May 7 for the 6:30 PM "Welcome Reception" at the Durham Hotel Rooftop. (Note: Everything is within walking distance except for the "Reception at Duke" on Tuesday evening--shuttles are being arranged for that event.) Next steps: <ul style="list-style-type: none"> Arrange for your own air travel and hotel stay based on your own unique schedule. Complete your pre-travel request form ASAP, providing the CUL OLE account number you were given (except for Holly and Darcy who should indicate that OLF is paying). Don't forget to register for WOLFcon!. Registration is free, plus you get a tee-shirt! <p>Do you have questions? Please contact these people directly...</p> <ul style="list-style-type: none"> For questions about logistics, please email Kate Waldron (people are finding that if they try to stay at the hotel on May 5th or May 10th they are being charged a higher rate for the entire stay). For questions about meeting content, please email Sharon Wiles-Young (I have found direct conflicts in the schedule, such as the early implementers meeting at the same time as implementer topics are being covered by the Sys Ops & Mgt SIG). 	<ul style="list-style-type: none"> Holly will find out if Peter is attending WOLFcon or not. If not, Holly will ask Dean if we can use Peter's spot for someone else.
12:10	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> Holly will check with Mike about PO for Reporting SIG <ul style="list-style-type: none"> Several meetings held (Holly and Sharon B., Holly with OLE "management", Sharon B. with OLE "management"). Clear that this is an area of concern for only the OLE libraries, so the solution needs to come from OLE. OLE cannot come up with another .5 FTE PO--best case would be 8-10 hours a week of existing OLE PO. Sharon B. and Holly are working together to creatively plan how work will get done with a 8-10 hour a week PO and rest of work done by others--will present to PC on Thursday. 	
12:40	Group Updates	Holly		
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Met last week. Submit accessibility feedback a few weeks ago--someone reviewed the feedback and made issues. Future accessibility testing may correlate with sprints Want to work with people with actual disabilities to make sure the screen reader, etc. actually works. 	
	Reporting SIG Update	Sharon (convener)	<ul style="list-style-type: none"> Had meeting earlier today to discuss JIRA ticket OKAPI-570, which is about creating technical infrastructure to support reporting--Frances and Jeremy Huff (TAMU) attended. Need for "data river" was identified. Next they need to set up a test environment so they can test out some of their ideas. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Inventory application, notably on searching within the app. See meeting notes for details (3/22 and 3/29). Some discussion on WeCat (potential cataloging tool). Group is beginning to plan how to best use time. Discussions have started about integration between acquisitions and inventory in the ERM context, a discussion that originates in the RM group. 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> The sub-groups continue to meet with the POs assigned to the sub-group topic. The full RA SIG met on 4/2 to discuss Fines and Fees and on 4/5 to discuss Services point (circ desk) functionality, closed loan screens and patron blocks. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> The FOLIO feature backlog spreadsheet for RM from the 2017 Survey is being moved to JIRA. This will help track what is being worked on by the ERM subgroup vs RM SIG. ERM subgroup will begin meeting weekly Wed April 11th. Reviewed Inventory app Item statuses. 	
	User Management SIG Update	Chris (convener)	<ul style="list-style-type: none"> Chris is out today due to a medical emergency. 	

	Sys Ops & Mgt SIG	Chris	<ul style="list-style-type: none"> Presenting LS Tools at next meeting (was delay due to illness and vacation of convener)-hoping there will be an app developed by OLE. 	
	Product Council Update	Jesse /Holly	<ul style="list-style-type: none"> Have been discussing WOLFcon. Have identified two QA positions for 9 months. 	
	Development Update	Frances /Matt /Darcy /Holly	<ul style="list-style-type: none"> ERM development team is ramping up—don't have final specs but enough to get going. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> No update provided. 	
	OLE Implementation Planning Team Update	Holly /Chris	<ul style="list-style-type: none"> OLE Steering Committee has approved membership criteria for group. Announced formation of group and shared criteria at Product Council meeting on March 29th, with April 13th deadline for passing names of folks who want to join—EBSCO and Index Data want to have someone join. Will set up first meeting that works for people designated by PC, but announce it as an open meeting. Created first draft of task list using model from U Chicago—we need to turn this into a plan. After that we need to define roles at CUL and determine how we will fill them. 	
	CUL Implementation Planning Team	Holly /Chris	<ul style="list-style-type: none"> This is actually a reformed version of this group that will happen as we transition from a focus on development to a focus on implementation. I met with Erin, Jason, and Adam C. for a first discussion about ArchiveSpace (which I learned RMC is implementing this year) and how it will work with FOLIO. After that meeting I contacted the convener of the Special Collections and Archives Working Group and learned that this is a major topic of the working group given that AS is used by almost everyone. Someone from CUL will either join the working group or keep up with their activities at https://wiki.folio.org/pages/viewpage.action?pageId=7833640. 	
12:55	Anything else?	n/a	<ul style="list-style-type: none"> Ran out of time. 	

2018-05-21

Attendees

Chris, Darcy, Deb, Frances, Holly, Jason, Jesse, Kizer, Matt, Peter, Sharon

Regrets: Dean, Melissa

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Announcements	Holly	<ul style="list-style-type: none"> Don't forget to complete your trip reimbursement—if you need account number let me know. Nancy already has the agenda. WOLFcon was a huge success—everyone wants to do this again, but need to figure out what to do about costs. 	
12:05	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Dean is on vacation, so he will need to report back next time. 	
12:06	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> ACTION: Holly will find out if Peter is attending WOLFcon or not. If not, Holly will ask Dean if we can use Peter's spot for someone else. RESULT: Joanne Leary was allowed to attend WOLFcon using funds freed by Peter. 	
12:10	Group Updates	Holly	WOLFcon activities? Take-aways?	
	Accessibility SIG Update	Melissa /Jesse	<ul style="list-style-type: none"> Went through list of outstanding issues from first round of testing. Some new faces showed up at WOLFcon session—may end of joining. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> Did a presentation for plenary on Thursday (talked about need for data confidence, test environment, etc.). Session on building the data lake. Session on data confidence with developers attending. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. Was a presentation at WOLFcon. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Discussed "bound withs." Worked with UX designer Kimie on inventory. Discussed content carrier and media types. Had conversation about what the inventory actually is—create draft definitions of what the inventory and codex are. Need a FOLIO data dictionary/glossary—raising issue to Product Council. Marc batch-loader sub-group has formed—Gary Branch is the CUL member. June 11 deadline for getting inventory data elements defined (for MM SIG, Reporting SIG, others). 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Having developers in the room was a great benefit. Discussed Item Status—breaking it down into more than one status. Discussed calendar—not sure the developers get it. Discussed patron notices—lead by Darcy. Discussed standardizing language (e.g. check-in for patrons returning books vs. serials arriving). Discussed scrubbing loan data. Holly did fees/fines presentation at plenary. Darcy did patron notices and print slips presentation at plenary. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> See RM WOLFcon notes. Met for 2.5 days during WOLFcon. 	
	User Management SIG Update	Chris (convenor)	<ul style="list-style-type: none"> We had one joint discussion with RA-SIG about some crossover issues. 	

		r)		
	Sys Ops & Mgt SIG	Chris	<ul style="list-style-type: none"> • Several useful discussions on production deployments and data migration at WOLFconf. • FOLIO install fest held on Monday—need better documentation, clearer procedure. 	
	Product Council Update	Jesse /Holly	<ul style="list-style-type: none"> • Gap analysis needed to see what needs to be done before OLE early implementer libraries can implement FOLIO. • Discussed resource needs. • Need to get Privacy SIG back up and running—needs a convener. • Discussed formation of Technical Council. 	
	Development Update	Frances /Matt /Darcy /Holly	<ul style="list-style-type: none"> • Frances reports ERM focus currently on managing past and current subscriptions. • Matt attended two useful sessions: Helper apps and Graph QL. • Darcy mentioned Mike and Jakub asking her to take on PO role for workflow engine. • Darcy mentioned the concept of certified FOLIO apps—this would help us insure people follow our guidelines. 	
	Marketing Team	Zsuzsa	<ul style="list-style-type: none"> • New OLE logo and website unveiled at WOLFcon on Thursday afternoon. 	
	OLE Summer 2019 Implementation Cohorts Group	Chris /Holly	<ul style="list-style-type: none"> • Met with EBSCO early implementers at WOLFcon (Chalmers, Five Colleges, Alabama, Hungary). • Early stages of setting up FOLIO Early Implementers Group - <ul style="list-style-type: none"> • Slack channel: early-implementers • E-lists: folio-earlyimps • Starting with data cleanup. • FOLIO Early Adopters Panel planned at ALA on 6/23/2018 (10:30 AM -11:30 AM, MCC, Rm 214) 	
	CUL Implementation Planning Team	Holly /Chris	<ul style="list-style-type: none"> • This is actually a reformed version of this group that will happen as we transition from a focus on development to a focus on implementation. 	
12:50	Anything else?	Sharon	<ul style="list-style-type: none"> • How do we share this with CUL? 	<ul style="list-style-type: none"> • Chris will plan a FOLIO First Friday on June 1st.

2018-06-18

Attendees

Chris, Darcy, Dean, Deb, Frances, Holly, Jesse, Kizer, Matt, Melissa, Peter, Sharon

Regrets: Jason

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> Next WOLFcon planned for October/November in Austin or Lisbon. 	
	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> OLE Board met last week—EBSCO offered us a chunk of money to significantly expand the partnership. We are considering some type of tiered membership given we can't have a huge Board, PC, etc. We need to be careful not to interrupt the work in process given we have a tight schedule. University of Leipzig is our new partner. They have added 2 ERM developers and 2 librarians. 	
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> ACTION ITEM: How do we share what we learned at WOLFcon with CUL? RESULT: Chris set up a FOLIO First Friday for June 1. 	
12:10	Gap Analysis	Jesse	<ul style="list-style-type: none"> All early implementers have been asked to complete a gap analysis exercise so we can see which FOLIO features are most important to each institution, which features are perhaps not needed right away or at all, and if any needed features are perhaps missing from our planned work list. The Product Council member for each early implementer institution is coordinating the effort, so Jesse is CUL's fearless leader. The gap analysis exercise will be used to replan v1, which isn't being called v1 anymore but doesn't appear to have another name. After the new plan is ready we will have a better idea of when what CUL needs will be ready. Jesse will be using this time to introduce the survey and its purpose, discuss the process, and possibly discuss some specific items on the lists. Jesse will send us a link to a CUL version of the feature spreadsheet after his meetings are over at 4:00 PM today. There will be a column added for the CUL person assigned to the feature. Jesse will do a first stab of the Epic prioritization tomorrow and share with the group. Jesse will send out office hours to the group. Please contact Holly if you have questions about the instructions or process. This is due on Friday. 	
Not enough time	SIG Updates			
	Accessibility SIG Update	Melissa /Jesse		
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Main concern for CUL at present: discussions of Inventory holdings data versus MFHD data in FOLIO. Concern focuses on whether FOLIO v1 will include enough granularity and expressivity of the Inventory holdings data model to suffice for the current MFHD functional requirements. If so, there will not be an issue to transform to MFHD for sharing requirements and meeting our current needs. If not, institutions may need to manage MFHD data and Inventory holdings data. A holdings data gap analysis has occurred to better understand the issue. 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> Still no Reporting Product Owner. Holly Mistlebauer acting as Interim Reporting PO until one placed. Data Warehouse proposal presented to Product Council 6/7/18 and approved. Data Warehouse now part of core FOLIO infrastructure development (end goal is a Data Warehouse, not a Data Lake). See JIRA ticket UXPROD-864. Data Warehouse needed by Sept 2018 for July 2019 Go Live. Holly working with other Product Owners to review Reporting Requirements spreadsheet, find in-app report candidates, and create JIRA tickets to have them developed as part of the functionality of a given microservice functional area. Sharon working with Gary Branch and Joanne Leary on Voyager-to-Folio data mapping for the Folio Inventory application (catalog). 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Each sub group creating list of needed reports. The Loans group would love a tool that allows us to insert different factors and create a report on the fly. Service points, fines/fee and claims returned are current topics. The Reserves group is asking for a "Ares lite" sort of a module. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> RM SIG and ERM subSIG have not met for a few weeks, because of German FOLIO Days, ALA prep, and the like. Recent RM work has continued to focus on acquisitions; ERM work has focused on wireframes for ERM module - these are being built and discussed. ERM group meets this Wednesday; RM SIG will wait until next Friday due to ALA. 	

	User Management SIG Update	Chris (convenor)	<ul style="list-style-type: none"> Continuing to refine requirements for gap analysis, etc. 	
	Sys Ops & Mgt SIG	Chris	<ul style="list-style-type: none"> Greg and Chris have begun working on local installs (within available time constraints). SIG discussions are focused around getting out Epics represented in JIRA when we have no PO. 	
Not enough time	Other Group Updates			
	Product Council Update	Jesse /Holly		
	OLE Summer 2019 Implementation Cohorts Group	Chris	<ul style="list-style-type: none"> All early implementers have been asked to complete a gap analysis exercise so we can see which FOLIO features are most important to each institution, which features are perhaps not needed right away or at all, and if any needed features are perhaps missing from our planned work list. The Product Council member for each early implementer institution is coordinating the effort, so Jesse is CUL's fearless leader. Ron Burns, our contact for EBSCO hosted early implementers, has left EBSCO. I have asked who our contact is now. 	
	CUL Implementation Planning	Chris /Holly /Jesse	<ul style="list-style-type: none"> This is actually a reformed version of this group that will happen as we transition from a focus on development to a focus on implementation. Chris, Jesse, and Holly have several working sessions set up to come up with a draft implementation plan that will then be shared with this group and fine-tuned as needed. 	
	FOLIO Development	Darcy /Frances/Holly /Matt	<ul style="list-style-type: none"> The last sprint review covered 4 sprints—watch the recorded demos here. 	
	Marketing Team	Zsuzsa		
Not enough time	Anything else?			

2018-07-30

Attendees

Chris, Darcy, Dean, Deb, Frances, Holly, Jason, Jesse, Kizer, Matt, Melissa, Peter, Sharon

Regrets:

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> No news on next WOLFcon date or location--still hearing October/November in Austin or Lisbon. 	
	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Leslie Reynolds is new Vice-Chair of OLE Board and Deborah Jacobs is Chair. Dean is now past Chair, which makes him part of the leadership team. FOLIO Stakeholders meeting in Boston September 13th. 	
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> None. 	
12:10	Gap Analysis/Capacity Planning Update	Holly	<ul style="list-style-type: none"> How do things look for a July 2019 implementation? 	
12:25	CUL Implementation Planning	Holly /Chris /Jesse	<ul style="list-style-type: none"> Discuss implementation scenarios. <ul style="list-style-type: none"> Full implementation July 2020 ERM 2019 and rest July 2020 Mid-fiscal year of full-implementation Discuss organization of team for implementation. Task list has been started--need input from rest of team now. Will turn task list into an implementation plan (Chris has installed OpenProject so we can try it out as a possible project management tool). 	
Not enough time	SIG Updates			
	Accessibility SIG Update	Melissa /Jesse		
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Continued work to assess gaps in inventory data model re: instance data required, holdings data and item data Location codes auto-generation and underlying model discussed MARCCat subgroup continuing work: https://wiki.folio.org/display/MM/MARCCat+Subgroup <ul style="list-style-type: none"> demo of WeCat provided : https://drive.google.com/file/d/1PvdNUFvSr_31y1NjGFKBZtpa_CSHrUbO/view?usp=sharing use cases for MARCCat: https://wiki.folio.org/display/MM/MARCCat+Subgroup%3A+Use+cases 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus--will spin up when needed again. 	
	Reporting SIG Update	Sharon (convenor)	<ul style="list-style-type: none"> Reporting SIG has asked Product Council to ask Technical Council to work on the technical design of the data warehouse. SIG discussed using reporting tools to access data warehouse, and options for data structures. All report requirements are being moved into the Folio JIRA, where there are 3 basic categories: "appreport," "dwreport," and "datawarehouse." SIG working on functional requirements and implementation schedule for Folio Reference Data Warehouse. Still no Reporting Product Owner, although Holly Mistlebauer helping as Interim Reporting PO Upcoming meeting topics: Consortial Reporting, Metridoc Datawarehouse, Plan for Historical Data Migration to Folio Data Warehouse 	
	Resource Access SIG Update	Deb	<ul style="list-style-type: none"> Item States (formerly known as statuses): info on availability of item at any time. What would a human have to do vs the system? Relationship between "needed for" and "processes". Lehigh has agreed to work on NCIP. We are thrilled as this is needed for several of our processes. SIP2 is still used-- will there be someone to work on this issue for us? Service points: what happens when an item is checked in in a many to many situation? Locations: Much discussion on how locations are generated and their use. Fines/Fees: who gets permissions to do what, what does the system do and what is manual.' Workflow engine: Apparently, there is a survey out there? I wasn't at this meeting, so am not sure what this means. The RA Sig is very concerned about what a workflow engine can do for us and if it will be ready for V1. Much of what we discuss is based on the concept of a workflow engine. 	

			<ul style="list-style-type: none"> • Requests: The RA SIG is very concerned about the first in, first out concept. We need to be able to define what would take precedence over other requests (reserve over a hold, for example) and be able to re-order the queue. • RA-SIG Folio Forum will be on Aug 15 at 11 am. 	
	Resource Management SIG Update	Peter /Ann	<ul style="list-style-type: none"> • Lisa Maybury participated in User Acceptance testing for the Vendor app • Acquisitions small group working on gathering order and finance data • What Kristin Martin reported back to RM SIG regarding Workflow - Workflow functionality discussed at PC, trying to figure out how to move forward with development. Workflow functionality wasn't ranked high on gap analysis/priority list. Index Data has been exploring how to incorporate workflow into FOLIO. Mike Gorrell has been exploring an open source product, Camunda. Discussion is going to continue at the next meeting. One point of discussion is what needs to happen centrally, in the workflow functionality, versus in individual apps. 	
	User Management SIG Update	Chris (convenor)	We've been working through "long tail" issues - UI requirements for password management, data migration field mappings, and other miscellany.	
	Sys Ops & Mgt SIG	Chris	We are beginning to see the start of release management, with a process for installing a consistent, (hopefully) stable release. Previous build procedures always pulled the latest code, which sometimes wouldn't work. Following the same process from day to day would yield different results.	
Not enough time	Other Group Updates			
	Product Council Update	Jesse /Holly		
	OLE Summer 2019 Implementation Cohorts Group	Chris	I will be sending out a Doodle poll to look for a time for our next meeting, now that the gap analysis is largely complete.	
	CUL Implementation Planning	Chris /Holly /Jesse	<ul style="list-style-type: none"> • Chris, Jesse, and Holly have several working sessions come up with a draft implementation plan that will will be discussing today. 	
	FOLIO Development	Darcy /Frances /Holly /Matt		
	Marketing Team	Zsuzsa		
Not enough time	Anything else?			

2018-08-13

Attendees

Chris, Darcy, Deb, Frances, Holly, Jason, Jesse, Peter, Sharon

Regrets: Dean, Melissa, Kizer, Matt

Discussion Items

Time	Item	Who	Notes	Actions
12:00	Housekeeping			
	Announcements	Holly	<ul style="list-style-type: none"> No news on next WOLFcon date or location, but told we would hear more this week. FOLIO Forum scheduled for Wednesday at 11:00am titled "What's New in Resource Access?" Register here. Should we try again for a different meeting time? Wait until "new" team together to do Doodle Poll? 	
	OLE Board & Other Updates	Dean	<ul style="list-style-type: none"> Dean out. 	
	Action Items from Last Meeting	Holly	<ul style="list-style-type: none"> None. 	
12:05	CUL Implementation Planning	Holly /Chris /Jesse	<ul style="list-style-type: none"> Implementation scenarios: <ul style="list-style-type: none"> Full implementation July 2020—for planning purposes we will focus on this scenario ERM 2019 and rest July 2020 Mid-fiscal year of full-implementation Discuss organization of team for implementation. <ul style="list-style-type: none"> We envision the implementation team having a rep from each functional area and from systems and Discovery- <ul style="list-style-type: none"> Resource Access (Deb) Finance (Ann) Acquisitions (Jesse) Serials Processing (Jesse) Metadata Management (Jason) Cataloging (Jason) eResource Management (Peter) Reporting (Sharon) Infrastructure (Chris) Discovery (TBD) The functional area rep will have a sub-team that they work with—there may even be sub-teams within the sub-teams. Working Groups will be created as needed. The new group will generate a list of staffing needs before the LEG retreat in September. The current team was called the CUL OLE Implementation team because we were supposed to implement OLE. Instead we became the CUL FOLIO Development team—we were the people on the SIGs and working as developers. It was helpful to have meetings to understand what was happening as the project ramped up. We feel there is no longer a reason for the Cornell development team (which includes SIG members) to meet separately from the other SIG members/developers. Future Monday noon meetings will be cancelled. Task list has been started—need input from rest of team now. Will turn task list into an implementation plan (Chris has installed OpenProject so we can try it out as a possible project management tool). 	<ul style="list-style-type: none"> How does CD fit in? Holly will talk to Kizer. Holly will contact Mary Beth regarding the Discovery Rep. Holly will set up a Doodle Poll for the first meeting of this group. Holly will ask Deb if RA functional area should be broken up like LTS is. Holly will cancel the CUL OLE Implementation meetings going forward.
Didn't get to this.	SIG Updates			
	Accessibility SIG Update	Melissa /Jesse		
	Internationalization SIG Update	Jesse	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Metadata Management SIG Update	Jason	<ul style="list-style-type: none"> Focus on WeCat / MARCCat – subgroup formed; Cornell has (limited) access to test WeCat environment; feedback started. Will be substantial work... Instance/Holdings/Items interface review 	
	Privacy SIG Update	Adam /Deb	<ul style="list-style-type: none"> On hiatus—will spin up when needed again. 	
	Reporting	Sharon		

	SIG Update	(conven er)	<ul style="list-style-type: none"> Reporting SIG welcomes new Product Owner, Nassib Nassar! considering OLF partnership with UPenn Metridoc to host and assist with developing the reference data warehouse Metridoc cannot provide an environment until late fall 2018, so working to set up a reference data warehouse tenant elsewhere to begin data structure development and testing continuing work on moving in-app reports into Folio JIRA for tracking exploring ways to capture information about data warehouse reports in JIRA, while keeping the detail provided on reporting requirements in the Reporting SIG Master Spreadsheet 	
	Resource Access SIG Update	Deb		
	Resource Management SIG Update	Peter /Ann	RM SIG looking at various specifics of acquisitions process. Addressing the necessary minutiae of actual development – questions about Purchase Orders and PO lines, various material types lists, etc. ERM subgroup is working through wireframes for what the ERM tool will look like. ERM eHoldings group hasn't met for several weeks.	
	User Management SIG Update	Chris (conven er)	On hiatus for August	
	Sys Ops & Mgt SIG	Chris	Looking at deployment methodologies with Kubernetes	
Didn't get to this.	Other Group Updates			
	Product Council Update	Jesse /Holly		
	OLE Summer 2019 Implementation Cohorts Group	Chris		
	CUL Implementation Planning	Chris /Holly /Jesse		
	FOLIO Development	Darcy /Franc es/Holly /Matt		
	Marketing Team	Zsuzsa		
12:55	Anything else?	Jason	Jason brought up the issue of WeCat not really doing what we want. Darcy brought up the issue of FOLIO not conducting usability tests. Jesse will work with them to bring these issues to the Product Council. At the last PC meeting we discussed the hardcoding of tables/list in Resource Management due to a complaint—the result was successful.	

Milestone List

Milestones will be added after [Implementation Plan](#) has been generated from [Implementation Task List...](#)

Milestone	Scheduled Date	Actual Date	Comments
Implement OLE	July 1, 2017		

File	Modified 
Microsoft Word Document CHICAGOMILESTONESJun5rev.docx Chicago's Milestone List	Jan 13, 2016 by Holly L. Mistlebauer

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OLD Integrations Pages

Deprecated Integrations List

NOTE: As of 3/26/2019 this list is deprecated. The current list is at [the CUL Implementation Project's Box site](#) .

Application	Internal /External to CUL?	CUL Contact	CUL IT Contact	Responsible Person	Type of Interaction	Source Endpoint /File	Data Format	Transformations (link to details)	Target Endpoint /File	Frequency	Con
Bursar	External	Billing supervisor s, Access Services	Phil Robinson	Phil Robinson / maybe CIT Integration Team	Voyager sends fines and fees to the Bursar. Do they tell us what has been paid? Do we get anything from Bursar?						Poten Integr Dell B
KFS	External	TBD	Phil Robinson	Phil Robinson / maybe CIT Integration Team	Voyager only sends to KFS, doesn't receive anything back. We feed KFS via BBD, which is used to pay vendors for books we have purchased.						Poten Integr Dell B counts payab how w our bil
PeopleSoft	External	TBD	Phil Robinson	Phil Robinson / maybe CIT Integration Team	This is how Voyager gets a patron feed (students, staff, etc.) and ID card info. We don't get a direct feed from Workday but rather a "downstream" feed from PeopleSoft. CIT's documentation from their side: CS 9.0 - CUIF0002 Library Patron Feed						Poten Integr Dell B
Central Authentication	External	TBD	Phil Robinson	Phil Robinson / maybe CIT Integration Team	FOLIO will integrate with identify management whereas Voyager doesn't.						Poten Integr Dell B
LS Tools	Internal	Gary Branch	George Kozak	Phil Robinson	Includes any tool used to load data into Voyager.						This is projec Techr Servc Autorr Produ Softw: Devel team i Adam Chant Adam Gary I Georg Kozak Franc
Loads to Catalog Outside of LS Tools	Internal	Peter Martinez		Phil Robinson	Peter uses BatchCat. There may be others.						
Access Reports	Internal	TBD		Sharon Beltaine	Includes reports for selectors, circulation, finance, etc. We plan on switching from Access to a service-based						This is projec

					reporting tool (BIRT comes with OLE).						
ArchiveMatica	Internal		Don Smith	Michelle Paolillo's team	In development						
ArchivesSpace	Internal		Don Smith		Update scripts that send bib, holdings, item info to voyager						
Blacklight Catalogue	Internal	D&A	Adam Smith		We will need to create the SOLR index from FOLIO instead of Voyager. There are APIs that support patron requests such as holds, recalls, deliveries, etc.						Franc like a identif chang catalo recor time v messi queue push. can't c with V but hc can in
AEON	Internal	Margaret Nichols	Phil Robinson	Deb Lamb-Deans	TBD						
Annex	Internal	Cammie Wyckoff	Phil Robinson	Deb Lamb-Deans	Voyager has a bi-directional interface with the Annex's inventory control system (LAS from GFA). Voyager request for something in the Annex triggers request to LAS. When item is moved to the Annex, LAS flips its location from a library to the Annex.						
ARES	Internal	Wendy Wilcox	Phil Robinson	Deb Lamb-Deans	TBD						Acces Servic Reser shoulk testing
Borrow Direct	Internal	Catlin Finlay	Phil Robinson	Deb Lamb-Deans	TBD						
Circ notices	Internal				Circulation notifications						
Edge APIs for MyAccounts, requests, etc.	Internal										
EDI	Internal	Jesse Koennecke	Phil Robinson	Jesse Koennecke	CUL orders things from vendors that are EDI compliant and uses EDI to pay vendors. CUL gets invoices from vendor, generates an invoice in Voyager, then cuts a check via KFS. LSTools manages a lot of this.						EDI st Electr Data Intercl
ERM (Intota from SS)	Internal	Jesse Koennecke	Phil Robinson	Jesse Koennecke	Feed data from ERM into Voyager—not sure if it's bi-directional.						
ILL Systems	Internal	Interlibrary Loan									
ILLIAD	Internal	Catlin Finlay	Was Rick Silterra (via Adam Smith)	Deb Lamb-Deans	CUL has add-ons like one that searches Voyager and another that						

					allows you to do ILL from Borrow Direct.						
Intota	Internal	ERM									
Mantis	Internal	Jesse Koennecke	Matt Connolly	Jesse Koennecke	This is a standalone workflow tool with no integration with Voyager. We may be able to replace it with something from OLE.						No ch
MeeScan / Overdrive	Internal				Self-check service						
New Books	Internal	Keith Jenkins	Keith Jenkins		This is a service.						
OCLC	External				Batch import + export of bib, hold; individual import + export of bib, hold, auth. Heavily supported by I stools.						
Patron-Driven Acquisitions	Internal	Gary Branch		Naun Chew	CUL gets bill after second use (usually ebooks) then we own it—do we get Marc records from somewhere?						
Patron-Driven Print Books	Internal	Gary Branch		Naun Chew	CUL receives Marc records from COUTTS, which are processed using LS Tools.						
Patron Stat Code	External	Joanne Leary			integrate LMS stat codes with CIT systems to obtain demographics such as student major, staff or faculty member department to be used for library reporting purposes.						
POOF!	Internal	Adam Chandler	Frances Webb (via Adam Smith)	Jesse Koennecke	<ul style="list-style-type: none"> POOF output in MARC format is modified by I stools prior to loading into voyager nightly 						Rick E was re POOF Hoyt develk middle betwe UI anc loadin is tran to Fra Webb
Vendor Record Loads	Internal	n/a	n/a	n/a	This is part of LS Tools.						For ex we ge 300 M recorc week appro vends COUT These recorc to be l into O we do Voyag


Some gaps: LSTools does a lot of data cleanup in OCLC data, MARC, POOF purchase orders (online order form), etc. Not just data imports/exports but cleansing.

COUTTS = OASIS

A good source is CUL Tech Services Automation Working Group Home / Specification Documents

The Workflow tool upcoming in FOLIO may fit some of the needs. Many vendor files need to be FTPed (currently a gap: Only drag-and-drop). We'd prefer to push the files via scripts.

Plus EDI EDIFact functionality. Same issue as FTP - need more than just drag and drop.

File	Modified 
<p data-bbox="703 611 919 632">No files shared here yet.</p> <p data-bbox="631 667 1010 688">Drag and drop to upload or browse for files</p>	

Integration Details

D&A

Patron Options:

- Library Catalog (SOLR index from Voyager)
- Databases (SOLR index from Voyager)
- Articles & Full Text (Summon, maintained via Intota)
- E-Journals Titles (Summon, maintained via Intota)

ERM (Intota from SS) & Mantis

Process for acquiring a new e-resource:

1. Selector fills out an eNERF (which we made up) which populates Mantis (a workflow tool)
2. In Mantis, are prompted to review the license, actually order the item, setup the catalog records, etc.
3. Mantis does not connect to Intota or Voyager—it stands alone
4. Then check Intota to find item you want to purchase and "activate" it
5. Voyager record is created to we can pay for item
6. Serials Solutions record may overlay the initial record
7. Intota does not interface with Voyager live, rather once per month SS does a batch process that produces two file: One file of Marc for our ejournal adds/changes/deletes) for the month and one file for ebooks
8. These Marc files are loaded to Voyager using an LS Tool

Patron-Driven Print Books

- If ebook not out within 6 weeks put in order for print copy
- Checks COUTTS for availability of print
- If not available at COUTTS request goes to Amazon
- Marc record comes from COUTTS
- A local script updates the Voyager record to "on order" so no one else tries to order it

OLD Meeting Notes - CUL Team

- [2016-05-13](#)
- [2016-04-08](#)
- [2016-03-04](#)
- [2016-02-26](#)
- [2016-02-19](#)
- [2016-02-12](#)
- [2016-02-05](#)
- [2016-01-29](#)
- [2016-01-15](#)
- [2016-01-08](#)
- [2015-12-08](#)
- [2015-11-20](#)
- [2015-11-13](#)
- [2015-11-06](#)

2015-11-06

Attendees

Dean, Ann, Deb, Chris, and Holly

Agenda

1. Generate project charter.
2. Putting together your team.
 - a. Assign someone to represent a particular function, such as acquisitions, cataloging, serials check in, etc. with Jesse as the leader for all Technical Services.
 - b. Update wiki page [Staff Assignments & Responsibilities](#).
3. Release 1.6.1 [sandbox](#) is ready.
 - a. Release 2.0 is scheduled for Q3 of 2015.
 - b. Release 3.0 is scheduled for Q1 of 2016. (Release 3.0 will be full functioning.)
 - c. How does this schedule impact our "deep dive"?
4. Deep dive into OLE.
 - a. Finish requirements first, then do test plan?
 - b. Instead develop [test plan](#) from requirements as they stand?
 - c. Software has been tested, we need to test to make sure it will work for us.
 - d. Must be a controlled test.
5. Develop [project management plan](#).
 - a. How should we communicate project status and to whom?
6. Develop [project documents](#).
 - a. Stakeholder Register
 - b. RMC?
 - c. ILL, Annex, and Reserves are covered by Deb's team.
 - d. Don't forget about services like New Books—they don't need to join team but need to be notified to change their service.
 - e. Should we email cu-lib to make sure we don't overlook any area?
7. Project Schedule
 - a. Meeting with UPenn PM today (Friday).
 - b. Meeting with Duke PM Tuesday.
8. Other announcements/items for discussion.

Notes

1. We identified several changes to the project charter. Please review the updated project charter on the front page of this wiki.
2. Deb and Chris have put together their teams. Ann and Jesse will do the same.
3. We won't wait for a particular release before we start testing. Instead, we will stay up with the releases as they come out.
4. Before starting the development of test plans for the "deep dive", the [requirements](#) for each functional area need to be finalized. They are all in different states of completion. Now that we are only concerned with Cornell we can tailor the requirements to us. Please move the requirements from the old 2CUL wiki to the new OLE wiki. The due date for finalizing the requirements in December 1, 2015.
5. We will communicate with CUL via monthly email update emails to CU-LIB (more if needed) and live sessions that we will schedule through the life of the project. We need to be transparent as well as available to hear what CUL has to say. Every voice should be heard, every question answered. Dean will keep LEG up to date and Kornelia, who is a member of LEG, will keep the library directors up to date via the Managers Council meetings.
6. We need to add people from RMC and SE Asia to our group. Holly will contact Anne S. and Xin. After Ann C. and Jesse have identified their teams and we have added RMC and SE Asia folks, we will send an email to CUL asking if anyone knows of an area that is not represented. Holly will also reach out to D&A to see if any of their features are not from Voyager. Frances will be the D&A rep for the project.
7. Chris and Holly met with UPenn after this meeting. See the notes [here](#). I have bolded the major points of interest.
8. Announcements.
 - a. Classic Catalog goes away when we implement OLE. Should we turn it off earlier to see who is impacted?
 - b. D&A piece will stay the same.
 - c. LEG has reviewed a draft transition budget and approved it in principle. Ezra is evaluating it further. Holly will be 75%-80% on this project through December 2017.
 - d. This project officially starts in January 2016. What we are doing now is prep for the official start of the project.
 - e. The IT Governance Council doesn't need to review this project because the "points" for this project are under the range that requires their involvement.
 - f. Dean and Chris will meet with the Application Advisory Committee for the purpose of reviewing integration.
 - g. CUL need to sign the MOU in order to be part of the Mellon Grant, which we would like to be.
 - h. We will be part of Phase I of OLE. Phase II is post-2017 and not funded at this point.

Action Items

- Ann and Jesse need to identify their teams and document the members in the [Staff Assignments & Responsibilities](#) wiki page.
- Chris, Deb, Ann, and Jesse need to finalize their requirements and add them to the [Requirements](#) wiki section by December 1, 2015.
- Everyone should review the project charter on the front page of this wiki.
- Holly will contact RMC and SE Asia to identify how their staff will be involved in this project.

2015-11-13

Attendees

Dean, Ann, Deb, Jesse, and Holly

Agenda

1. Announcements.
 - a. Holly and Chris met with [UPenn](#) and [Duke](#).
 - b. Turn on option to watch the OLE wiki space. (*Instructions: Go to wiki home page, select **Pages** in gray left hand bar, click on "Watch this Space" in top right corner.*)
 - c. Let me know if you will be attending a meeting remotely—otherwise I won't start WebEx.
 - d. Include Holly in group meetings as a "lurker."
 - e. Others?
2. Action items from last meeting.
 - a. Ann and Jesse need to identify their teams and document the members in the [Staff Assignments & Responsibilities](#) wiki page.
 - b. Chris, Deb, Ann, and Jesse need to finalize their requirements and add them to the [Requirements](#) wiki section by December 1, 2015.
 - c. Everyone should review the project charter on the front page of this wiki.
 - d. Holly will contact RMC and SE Asia to identify how their staff will be involved in this project.
3. Updates to [project documents](#).
4. Updates to [project management plan](#).
5. What's next?
 - a. Finish [requirements](#).
 - b. Generate [test plan](#) from requirements.
7. Other items for discussion?

Notes

1. Reviewed notes from meetings with [UPenn](#) and [Duke](#). Dean made two announcements:
 - a. We are currently doing a proposal for the Applications Advisory Committee (AAC).
 - b. We are holding off on signing the MOU, but we have been included in the Mellon Grant.
 - c. He will be from tomorrow until December 2nd.
2. The teams have been created. Holly has contacted RMC and SE Asia. Xin has asked that Greg Green be copied on emails. Haven't heard back from Anne re: RMC.
3. Reviewed the latest [project documents](#).
4. Not much progress has been made with the [project management plan](#), but Holly hopes to get to it soon.
5. Updating requirements is in progress.
6. Other items for discussion:
 - a. Identify levels of security for staff
 - b. Concern about amount of mousing versus keyboard commands. Is this built into OLE? It isn't in KFS. Will probably need to set up Macro Express with keyboard commands.
 - c. Include VIVO people who have worked on journal identifiers.

Action Items

- Chris, Deb, Ann, and Jesse need to finalize their requirements and add them to the [Requirements](#) wiki section by December 1, 2015.
- Holly will meet with Jesse to discuss the [Integration List](#)—then will ask team for additional updates.
- Someone needs to talk to Kizer Walker about how to include Collection Development folks—can't remember who.

2015-11-20

Attendees

Ann, Chris, Jesse, and Holly

Agenda

1. Announcements.
2. Kual Days updates:
 - a. Overview from Chris.
 - b. Highlights from [Jim's report](#).
 - i. If you don't have one already, build and nurture a good relationship with your IT office.
 - ii. Reduce the number of rules and policies you plan to support as configuring these options is hard, complicated work.
 - iii. For University of Chicago, performance has been the biggest hindrance to productivity.
 - iv. There isn't a predictive check-in for serials not is there an automated claiming feature (will there be?)
 - v. University of London practiced the data migration several times—in the end it took 8 days.
 - vi. Many meeting participants stated that the migration to and implementation of OLE is painful, but that is true of any new ILS.
 - vii. Additional good notes related to Technical Services for Jesse to look at.
3. Action items from last meeting.
 - a. Holly will contact RMC and SE Asia to identify how their staff will be involved in this project. **Update: Xin wants Deb to include Greg Green in emails. Anne wants Margaret Nichols in the TS group.**
 - b. Chris, Deb, Ann, and Jesse need to finalize their requirements and add them to the [Requirements](#) wiki section by December 1, 2015.
 - c. Holly has meeting scheduled with Jesse to discuss the [Integration List](#)—then Holly will ask team for additional updates. **Update: Met with Jesse yesterday afternoon. Holly updating Integration List per that meeting.**
 - d. Someone needs to talk to Kizer Walker about how to include Collection Development folks—can't remember who. **Update: Ann has talked to Kizer about updating the fund structure. Holly will contact him to see how CD should be involved.**
4. Updates to [project documents](#).
5. Updates to [project management plan](#).
6. What's next?
 - a. Finish [requirements](#).
 - b. Generate [test plan](#) from requirements.
7. Other items for discussion?

Notes

Most of the meeting was spent discussing Kual Days. Chris will be writing up his notes and attaching them to the [2015-11-11 & 12 Kual Days 2015](#) page where Jim's notes are.

See the updates for Action Items above.

Action Items

- Chris, Deb, Ann, and Jesse need to finalize their requirements and add them to the [Requirements](#) wiki section by December 1, 2015.
- Holly will talk to Kizer to find out what role Collection Development should play in this project.

2015-12-08

Attendees

Ann, Chris, Dean, Deb, Jesse, and Holly

Agenda

1. Announcements.
2. Action Items from last meeting:
 - a. Chris, Deb, Ann, and Jesse need to finalize their requirements and add them to the [Requirements](#) wiki section by December 1, 2015.—*WILL DISCUSS AS PART OF ITEM #4 BELOW*
 - b. Holly will talk to Kizer to find out what role Collection Development should play in this project.—*WILL DISCUSS AS PART OF ITEM #3 BELOW*
3. Change team structure to match OLE modules?
 - a. [Select & Acquire](#) covers financial, selection, acquisitions, receiving, payment/invoicing, licensing, and ERM. **(Ann, Jesse, and Kizer)**
 - b. [Describe & Manage](#) covers creating and editing bibliographic data, summary holdings, item, and authority data. **(Jesse or someone else?)**
 - c. [Deliver](#) covers patron, checkin/checkout, fines, requests, holds, and electronic access **(Deb)**
 - d. Duke also has Systems Team and Data Team (Chris)
4. Status of [requirements](#):
 - a. Ann - [Finance](#)
 - b. Chris - [Information Technology](#)
 - c. Deb - [Public Services](#)
 - d. Jesse - [Technical Services](#)
6. Updates to [project documents](#):
 - a. Ready for use:
 - i. [Assumptions & Constraints Log](#)
 - ii. [Change Log](#)
 - iii. [Communications Log](#)
 - iv. [Contacts List](#)
 - v. [Issue Log](#)
 - vi. [Proposals & Agreements](#)
 - vii. [Requirements](#)
 - viii. [Risk Register](#)
 - ix. [Staff Assignments & Responsibilities](#)
 - x. [Status Reports](#)
 - b. Under construction:
 - i. [Budget](#)
 - ii. [Integration List](#)
 - iii. [Milestone List](#)
 - iv. [Project Schedule](#)
 - v. [Stakeholder Register](#)
 - vi. [Test Plans](#)
 - vii. [User Documentation Plan](#)
 - viii. [User Training Plan](#)
7. [Project management plan](#) is under construction except for [Change Management Plan](#), which is done.
8. What's next?
 - a. Start generating [test plans](#) from requirements.
 - b. Further work by Holly on [project management plan](#) and [project documents](#).
9. Other items for discussion?

Notes

Announcements from Dean

- Our proposal was accepted by the Applications Advisory Committee (AAC) and was to be submitted to the IT Advisory Council (ITAC). Dean learned that we don't need ITAC approval because we aren't using capital funds. The IT Governance Council (ITGC) is doing their approval via email with a deadline of today at 5:00pm. The OLE MOU was created by Dean and given to Anne for her signature. This means that we will make the cutoff to be part of the new grant. We may be OLE partners by the end of today. **(Update: ITGC did approve OLE)**
- Dean has a meeting with Ken Putman and Ezra to go over the budget. It is key that we stop paying for Voyager in July 2017, when we are scheduled to implement OLE.

Organization of Team

- We have agreed to switch to the OLE model, which means we have the following four teams: Select & Acquire, Describe & Manage, Deliver, and Systems Integration. The team leaders are as described in the agenda.
- Jesse will check with Naun to see who should be the lead on the Describe & Manage part.
- Holly will check with Kizer to see who from Collection Development will be joining the Select & Acquire team.
- Holly will update the wiki to reflect this new organization.
- Jesse needs to split his Technical Services requirements into two parts: Select & Acquire and Describe & Manage.

Status of Requirements

- Ann: The basic requirements were finished last week. At tomorrow's staff meeting she will review the requirements. This group helped develop the requirements, so they should be fine.
- Jesse: He updated the original Google doc to remove Columbia's requirements. Now he needs to split the Google doc in two parts (Select & Acquire and Describe & Manage).
- Chris: IT requirements are at a high-level. Lydia is doing an inventory of Access reports and Pete is doing the same for LS Tools. Reports being run by others are being logged to see what is used and therefore needed in OLE.
- Deb: She took the original list of requirements and pulled out Columbia. She is meeting with her committee on Friday to review the requirements.

Project Documents

- Unable to review project documents due to not having projection available.

Project Management Plan

- Unable to review project management plan due to not having projection available.

What's next?

- Finalize requirements by January 4th.
- Start working on test plans in new year.
- Cancel meetings for the rest of this year.

Other Items

- Jesse has requested that we add a sub-section to the wiki for each area for discussion items, etc.
- Adam C. asked Jesse about tools for non-IT folks who engage with OLE. Too soon to discuss.
- We need to make sure we don't overlook Linda Miller's annual report work. This is included in Lydia's report work.
- Chris recommended that we do sprints for the testing. One week we could test a particular feature/module and make sure all of the players are available to focus on this. We will be taking this approach.

Action Items

- Everyone will finalize their requirements by January 4th.
- Jesse will check with Naun to see who should be the lead on the Describe & Manage part.
- Holly will check with Kizer to see who from Collection Development will be joining the Select & Acquire team.
- Holly will update the wiki to reflect this new organization.
- Jesse needs to split his Technical Services requirements into two parts: Select & Acquire and Describe & Manage.
- Holly will add a sub-section to the wiki for each area.

2016-01-08

Attendees

Ann, Chris, Dean, Jesse, Holly, and Kizer

Regrets: Naun (ALA Midwinter) and Deb

Agenda

1. Announcements.
2. Action Items from last meeting:
 - a. Everyone will finalize their requirements by January 4th.
 - b. Jesse will check with Naun to see who should be the lead on the Describe & Manage part.--DONE
 - c. Holly will check with Kizer to see who from Collection Development will be joining the Select & Acquire team.--DONE
 - d. Holly will update the wiki to reflect this new organization.--DONE
 - e. Jesse needs to split his Technical Services requirements into two parts: Select & Acquire and Describe & Manage.
 - f. Holly will add a sub-section to the wiki for each area.--DONE
3. OLE group updates:
 - a. OLE Board (Dean)
 - b. OLE Functional Council (Xin, with Jim as backup)
 - c. OLE Technical Council (Chris, with Holly as backup)
4. How do we put our ideas forth regarding the direction of OLE? For example, Naun wants to have input about authority control. We have different ideas about it than other libraries. OLE 3.0 includes phase 1 of authority control, so we should get involved now. Should Naun work with Xin on this?
5. Review [Project Management Plan](#):
 - a. Ready for review:
 - i. [Change Management Plan](#)
 - ii. [Communication Management Plan](#)
 - iii. [Cost Management Plan](#)
 - iv. [Human Resource Management Plan](#)
 - v. [Issue Management Plan](#)
 - vi. [Procurement Management Plan](#)
 - vii. [Quality Management Plan](#)
 - viii. [Risk Management Plan](#)
 - ix. [Scope Management Plan](#)
 - x. [Scope Statement](#)
 - xi. [Stakeholder Management Plan](#)
 - xii. [Time Management Plan](#)
 - b. Not started:
 - i. [Cost Baseline](#)
 - ii. [Schedule Baseline](#)
6. Identify additional [stakeholders](#) using the [Stakeholder Management Plan](#).
7. Identify additional [project risks](#) using the [Risk Management Plan](#).
8. Review [project documents](#):
 - a. Ready for use:
 - i. [Assumptions & Constraints Log](#)
 - ii. [Change Log](#)
 - iii. [Communications Log](#)
 - iv. [Contacts List](#)
 - v. [Issue Log](#)
 - vi. [Requirements](#)
 - vii. [Risk Register](#)
 - viii. [Staff Assignments & Responsibilities](#)
 - ix. [Status Reports](#)
 - b. Under construction:
 - i. [Budget](#)
 - ii. [Integration List](#)
 - iii. [Milestone List](#)
 - iv. [Project Schedule](#)
 - v. [Stakeholder Register](#)
 - vi. [Test Plans](#)
 - c. Not started:
 - i. [User Documentation Plan](#)
 - ii. [User Training Plan](#)
9. What's next?
 - a. Start generating [test plans](#) from requirements.
 - b. Further work by Holly on [project documents](#).
10. Other items for discussion?

Notes

1. Welcomed Kizer and Naun to group.

2. The open action items from the last meeting need to be completed by our next meeting. Jesse will work with Kizer on the CD requirements and with Naun to split up the TS requirements.
3. The various OLE group meeting notes will be available on the [OLE Groups](#) wiki page. Some of the information is confidential so it will not be available on this wiki.
4. Chris pointed out that there is a SME team for authority control. Holly has contacted Heather Beery, the project manager for OLE, to see if Naun may join this group. The list of OLE SME teams is available on the [OLE SME Teams--ceased](#) wiki page. Please let Holly know if you are interested in joining one of the teams.
5. We reviewed the first five [Project Manager Plan](#) sections in the list above.
 - a. The [Communication Management Plan](#) requires changes to add the Managers Council, Library Directors Group, CD Exec, PSEC, and LTS Senior Management Team. Holly has made the changes so please check the [Communication Management Plan](#) to confirm the groups you have been assigned to communicate with. Let me know if I have misrepresented anything.
 - b. The [Human Resource Management Plan](#) requires changes to the Project Sponsor role to clarify how the decision making will be handled and to the Module Coordinator role to clarify that this role is not responsible for the documentation and training, but rather will contribute to and evaluate the documentation and training.
 - c. At the next meeting we will review more sections.
6. This agenda item has been moved to the next meeting.
7. This agenda item has been moved to the next meeting.
8. This agenda item has been moved to the next meeting.
9. After all of the requirements are ready, we will start working on test plans. Holly also hopes to have the project documents all ready for use next week.
10. Should we involve the usability group in this project? We most like don't have the ability to change the usability of OLE for the version we will implement, but perhaps we can get help from our excellent usability group for future releases of OLE.

Action Items

- Jesse will work with Kizer to finalize the CD requirements.
- Jesse will work with Naun to split the TS requirements.
- Everyone else will confirm that their requirements are complete.
- Holly will update the [Communication Management Plan](#) and [Human Resource Management Plan](#) per input from the team.
- Everyone should review the [Communication Management Plan](#) to confirm that they are assigned to the correct groups.
- Everyone should review the [Human Resource Management Plan](#) to confirm that their role is defined properly.
- Holly will contact Heather Beery to arrange for Naun to join the Describe - Authority SME team.

2016-01-15

Attendees

Ann, Chris, Dean, Deb, Jesse, Holly, Kizer, and Naun

Regrets: None

Agenda

1. Announcements.
 - a. Welcome Naun.
 - b. Watch space.
3. Action Items from last meeting:
 - a. Jesse will work with Kizer to finalize the CD requirements.--WILL DO NEXT WEEK
 - b. Jesse will work with Naun to split the TS requirements.--DONE
 - c. Everyone else will confirm that their requirements are complete.--DONE
 - d. Holly will update the [Communication Management Plan](#) and [Human Resource Management Plan](#) per input from the team.--DONE
 - e. Everyone should review the [Communication Management Plan](#) to confirm that they are assigned to the correct groups.
 - f. Everyone should review the [Human Resource Management Plan](#) to confirm that their role is defined properly.
 - g. Holly will contact Heather Beery to arrange for Naun to join the Describe - Authority SME team.--DONE
4. OLE partnership updates:
 - a. OLE Board (Dean)
 - b. OLE Functional Council (Xin, with Jim as backup)
 - c. OLE Technical Council (Chris, with Holly as backup)
5. Who should join [SME teams](#)?
6. Review [Stakeholder Register](#).
7. Review [Integration List](#).
8. Review remaining [Project Management Plan](#):
 - a. Ready for review:
 - i. [Procurement Management Plan](#)
 - ii. [Quality Management Plan](#)
 - iii. [Risk Management Plan](#)
 - iv. [Scope Management Plan](#)
 - v. [Scope Statement](#)
 - vi. [Stakeholder Management Plan](#)
 - vii. [Time Management Plan](#)
 - b. Not started:
 - i. [Cost Baseline](#)
 - ii. [Schedule Baseline](#)
9. Review [project documents](#):
 - a. Ready for use:
 - i. [Assumptions & Constraints Log](#)
 - ii. [Change Log](#)
 - iii. [Communications Log](#)
 - iv. [Contacts List](#)
 - v. [Integration List](#)
 - vi. [Issue Log](#)
 - vii. [Requirements](#)
 - viii. [Risk Register](#)
 - ix. [Staff Assignments & Responsibilities](#)
 - x. [Stakeholder Register](#)
 - xi. [Status Reports](#)
 - b. Under construction:
 - i. [Budget](#)
 - ii. [Milestone List](#)
 - iii. [Project Schedule](#)
 - iv. [Test Plans](#)
 - c. Not started:
 - i. [User Documentation Plan](#)
 - ii. [User Training Plan](#)
10. What's next?
 - a. Start generating [test plans](#) from requirements--will discuss process at next meeting.
 - b. Finish list of high-level tasks needed for schedule.
11. Other items for discussion?

Notes

Announcements: See Agenda above.

Action Items: See Agenda above.

OLE partnership updates:

- OLE Board: No updates—the board meets monthly.
- OLE Functional Council: No updates this week.
- OLE Technical Council: This week's meeting was a closed session of voting members to discuss future of OLE Technical Council. Councils are covering the same material.

Joining [SME teams](#): Everyone will give this some thought and recommend folks for the SMEs at our next meeting. So far we have Naun on the Describe SME.

Reviewed [Stakeholder Register](#):

- Deb will be the "Relationship Owner" for Kornelia (and her Library Director's group).
- Change "Relationship Owner" for New Books and both Patron-Driven options.
- Holly will be the "Relationship Owner" for PSEC.
- We need to add D&A, Reference,RMS, SE Asia, KFS, IT Security, faculty, students, CUL Communications (Zsu Zsa), and various interfaces.
- Change Deb's area of responsibility to Access Services (rather than Public Services).

Reviewed [Integration List](#): Deb's area of responsibility is Access Services (rather than Public Services)—make changes as needed.

Reviewed [Project Management Plan](#):

- Finished reviewing the [Project Management Plan](#).
- Need to update the [Scope Statement](#) to include a running system as a deliverable.

Review [project documents](#): Ran out of time—will do this next time.

What's next?

- Start creating [test plans](#) from the requirements—we will discuss the process further at our next meeting.
- Holly will continue working on the project schedule—with something to review at our next meeting.

Other items for discussion:

- Lyndia recommended that we have a project kickoff meeting for the extended project team. Holly will plan this.
- We also need to have a face-to-face kickoff with all CUL staff—best to wait until we have the project schedule ready.
- When is Texas A&M implementing OLE? They are migrating from Voyager as well.

Action Items

- Kizer should review requirements to make sure CD is correct.
- Everyone should "watch" this space—instructions available at <https://confluence.atlassian.com/conf51/watching-a-space-336169116.html>.
- Everyone should start creating [test plans](#) from the requirements.
- Everyone should be prepared to recommend folks for the [SME teams](#) at our next meeting.
- Holly will continue working on the project schedule.
- Holly will update the Project Management Plan and project documents as described in the notes.
- Holly will plan a project kickoff get together for the extended project team.

2016-01-29

Attendees

Ann, Deb, Jesse, Holly, and Kizer

Regrets: Chris, Dean, and Naun

Agenda

1. Announcements.
2. Action Items from last meeting:
 - a. Kizer should review requirements to make sure CD is correct.–KIZER HAS LOOKED OVER THE REQUIREMENTS AND WILL GIVE HIS INPUT TO JESSE
 - b. Everyone should "watch" this space–instructions available at <https://confluence.atlassian.com/conf51/watching-a-space-336169116.html>.
 - c. Everyone should start creating [test plans](#) from the requirements.
 - d. Everyone should be prepared to recommend folks for the [SME teams](#) at our next meeting.
 - e. Holly will continue working on the project schedule.–PRESENTING FIRST DRAFT AT TODAY'S MEETING
 - f. Holly will update the Project Management Plan and project documents as described in the notes.–DONE
 - g. Holly will plan a project kickoff get together for the extended project team.–SCHEDULED 2/22;NEED TO INVITE FOLKS, PLAN AGENDA, ETC.
3. OLE partnership updates:
 - a. OLE Board (Dean)
 - b. OLE Functional Council (Xin, with Jim as backup)
 - c. OLE Technical Council (Chris, with Holly as backup)
4. Who should join [SME teams](#)?
5. Discuss [test plans](#) progress.
6. Review first draft of [schedule task list](#).
7. Plan agenda for project kickoff meeting.
8. Review [project documents](#):
 - a. Ready for use:
 - i. [Assumptions & Constraints Log](#)
 - ii. [Budget](#)
 - iii. [Change Log](#)
 - iv. [Communications Log](#)
 - v. [Contacts List](#)
 - vi. [Integration List](#)
 - vii. [Issue Log](#)
 - viii. [Requirements](#)
 - ix. [Risk Register](#)
 - x. [Staff Assignments & Responsibilities](#)
 - xi. [Stakeholder Register](#)
 - xii. [Status Reports](#)
 - b. Under construction:
 - i. [Milestone List](#)
 - ii. [Project Schedule](#)
 - iii. [Test Plans](#)
 - c. Not started:
 - i. [User Documentation Plan](#)
 - ii. [User Training Plan](#)
9. Other items for discussion?
 - a. At a future meeting we will discuss what Agile sprints are all about.
 - b. For those who do not know how to use JIRA (an issue tracking application) I will hold a training session soon.
11. What's next?
 - a. Continue generating [test plans](#) from requirements.
 - b. Assign dates to [schedule task list](#).

Notes

Announcements: None.

Action Item Status: See notes for Agenda item 2.

OLE Partnership Updates: None.

SME Teams:

- Deliver - Deb and Joanne, with Cammie and Caitlin as backups.
- Describe - Naun only for now.
- Select & Acquire - Jesse (he will share agenda with Kizer and Ann to see if they should attend particular meeting)
- Systems Integration - Check with Chris
- Import/Load Records - Should include Adam or Gary and someone from Chris's team.

Test Plans:

- Deb has started working on the Deliver test plans, but ran into a snag because we need to have the circ rules done before she can complete the test plans. We also need to do the sign on rules. Chris wasn't at this meeting, so Holly will put both on the agenda for the next meeting.
- Ann and Jesse have test plans from Voyager that will be used as a starting point for OLE testing.

Schedule Task List Review: Really need Chris here for that, so will cover this at the next meeting. Everyone has a copy to review in advance of that meeting.

Kickoff Meeting Agenda: We will introduce the team, give a status, discuss the schedule, and then open the floor for questions.

Project Documents: Holly walked through the project documents and discussed what the purpose of each is.

Other Items for Discussion:

Deb mentioned that UPenn might not implement this summer due to slipping of 3.0 release date.

Deb discussed Classic Catalog's demise with Korneila. Korneila emphasized that we need to come up with a communication plan that gives plenty of notice for those non-staff members who are still using Classic Catalog. Holly will contact D&A to see what is still missing from the patron interface. Frances mentioned to Holly a feature she is working on that should help Classic Catalog users. We should time the shutting down of Classic Catalog to be after the new feature is in.

Action Items

- Everyone will review the [schedule task list](#) for discussion at next meeting.
- Everyone will continue working on the test plans for their functional area.
- Deb will contact the OLE Deliver SME team leader to arrange for Deb and Joanne to join the SME.
- Jesse will contact the OLE Describe & Select SME team leader to arrange for Jesse to join the SME.
- Chris should determine who should be part of the Systems Integration SME team and arrange for them to join the SME.
- Chris and Jesse will work together to determine who should join the Import/Load Records SME team.
- Chris will come to the next meeting prepared to discuss how circ rules and sign on rules are entered into OLE.
- Holly will finish setting up the project kickoff meeting.
- Holly will add a Circ Rules section to the Deliver team space.--DONE
- Holly will find out how to get an account to have access to the SME wiki.
- Holly will check with D&A to see what is missing that is in Classic Catalog.
- Holly will create a communication plan for the demise of Classic Catalog.

2016-02-05

Attendees

Ann, Chris, Dean, Deb, Jesse, Holly, Kizer, and Naun

Regrets: None

Agenda

1. Announcements.
2. Action Items from last meeting:
 - a. Everyone will review the [schedule task list](#) for discussion at next meeting.–WILL DISCUSS FURTHER DOWN IN AGENDA
 - b. Everyone will continue working on the test plans for their functional area.–WILL DISCUSS FURTHER DOWN IN AGENDA
 - c. Deb will contact the OLE Deliver SME team leader to arrange for Deb and Joanne to join the SME.–DONE
 - d. Jesse will contact the OLE Describe & Select SME team leader to arrange for Jesse to join the SME.–DONE
 - e. Chris should determine who should be part of the Systems Integration SME team and arrange for them to join the SME.–WILL BE CHRIS AND ALAN
 - f. Chris and Jesse will work together to determine who should join the Import/Load Records SME team.–NOT SURE SME ACTUALLY EXIST–CHRIS WILL FIND OUT
 - g. Chris will come to the next meeting prepared to discuss how circ rules and sign on rules are entered into OLE.–WILL DISCUSS FURTHER DOWN IN AGENDA
 - h. Holly will finish setting up the project kickoff meeting.–WILL DO TODAY
 - i. Holly will add a Circ Rules section to the Deliver team space.–DONE
 - j. Holly will find out how to get an account to have access to the SME wiki.–DONE
 - k. Holly will check with D&A to see what is missing that is in Classic Catalog.–ON HOLLY'S TO DO LIST
 - l. Holly will create a communication plan for the demise of Classic Catalog.–ON HOLLY'S TO DO LIST
3. OLE partnership updates:
 - a. OLE Board (Dean)
 - b. OLE Functional Council (Xin, with Jim as backup)
 - c. OLE Technical Council (Chris, with Holly as backup)
4. Discuss creation of Circ Rules.
5. Discuss creation of Sign On Rules.
6. Discuss [test plans](#) progress.
7. Review first draft of [schedule task list](#).
8. Other items for discussion?
9. What's next?
 - a. Continue generating [test plans](#) from requirements.
 - b. Assign dates to [schedule task list](#).
 - c. Agile and JIRA "training."

Notes

Announcements

- Official press release went out for Mellon grant.
- OLE putting a hold on ERM work for now. Not a big deal for us—we will continue on with external tools we use now. Naun, Adam, and Jesse is meeting with OLE folks next week to discuss what we do and what our expectations are.
- UPenn has postponed their summer 2016 implementation of OLE due to the delay in release 3.0 availability.
- The Describe & Manage SME discussed Authority Control files, which many institutions don't. Looking at a more forward thinking authority control process. Naun will send out the "functional matrix" that EBSCO/IndexData are using to solicit contacts on various functional issues.
- Deb and Joanne will be added to the Deliver SME (with Cammie and Caitlin as backups).

Action Items from last meeting: See status in Agenda above.

OLE partnership updates

- Technology Council didn't meet this week, but did meet last week. Most of the discussion was what happens to the Technical Council due to changes in OLE. Decided to meet every other week.

Creation of Circ Rules

- Implement with system called Drools.
- Deb and her sub-team will create Circ Rules in plain English and someone in IT will code the Rules in Drools. The plain English will become comments in the Drools code.
- Drools is used for check in and check out, fines and fees, etc.
- Deb will be focusing on Circ Rules since they need to be set before she finishes the test plans.

Creation of Sign On Rules

- Use Shibboleth. Set up rolls and then assign people a roll. When people leave they will be pulled out automatically when their netid quits working.
- Chicago does individual logins at Circ Desk, rather than using a shared account for students. We need to find out from Chicago how painful this has been.
- There is an interface to manage this.

Test Plans progress

- By the end of February Chris will have an idea of when the test instance with CUL data will be available.
- Right now our test instance of 2.0 is broken.
- Ann is going over basic test plan with staff today.
- Jesse and Naun have test plans to use but need to pull everything together.
- Kizer will work with Select & Acquire team.
- Deb needs Circ Rules before she can finish test plans.

Review schedule task list

- Need to redo testing when new versions of OLE are installed.
- Will be some development work for integrations—not sure which ones and how much yet.
- At some point we need to identify the version of OLE we will go live with and stick to it.
- Need to setup Sign On Rules.
- Chris will further review the plan and give input to Holly.

Other items for discussion?

- From now on those of us on SME teams will send our status info before the start of the meeting. Only questions will be discussed at the meetings.

Action Items

- Chris will find out if Import/Load Records SME team actually exists.
- Chris will have himself and Alan added to Systems Integration SME team.
- Chris will review the schedule tasks list and pass his changes on to Holly.
- Deb will work with her sub-team to determine the new Circ Rules.
- Holly will finish setting up project kickoff meeting.
- Holly will update the project schedule per input from team.
- Naun will send out the “functional matrix” that EBSCO/IndexData are using to solicit contacts on various functional issues.
- Members of SME teams will send status to group prior to meeting.
- Everyone will continue working on test plans.

2016-02-12

Attendees

Ann, Chris, Dean, Deb, Jesse, Holly, and Naun

Regrets: Kizer

Agenda

1. Announcements.
2. Action Items from last meeting:
 - Chris will find out if Import/Load Records SME team actually exists.–**DOES NOT EXIST**
 - Chris will have himself and Alan added to Systems Integration SME team.–**CHRIS HAS BEEN ADDED & ALAN WILL ADD HIMSELF**
 - Chris will review the schedule tasks list and pass his changes on to Holly.–**CHRIS & HOLLY WILL MEET TODAY**
 - Deb will work with her sub-team to determine the new Circ Rules.–**ON GOING PROCESS**
 - Holly will finish setting up project kickoff meeting.–**DEAN, CHRIS, & HOLLY WILL MEET NEXT WEEK TO PLAN PRESENTATION**
 - Holly will update the project schedule per input from team.–**SEE CHANGES TO [SCHEDULE TASK LIST](#)**
 - Naun will send out the "[functional matrix](#)" that EBSCO/IndexData are using to solicit contacts on various functional issues.–**NAUN SENT THIS OUT**
 - Members of SME teams will send status to group prior to meeting.–**DEB & NAUN SENT OUT A SUMMARY, JESSE DIDN'T HAVE ANY NEWS**
 - Everyone will continue working on test plans.–**JESSE WILL ASK HOLLY FOR HELP IS NEEDED**
 - Holly will check with D&A to see what is missing that is in Classic Catalog.–**KEN BOLTON HAS BEEN CHARGED TO HANDLE SHUTTING DOWN THE CLASSIC CATALOG**
 - Holly will create a communication plan for the demise of Classic Catalog.–**MEETING WITH SEPARATELY ZSUZSA AND PSEC TODAY TO DISCUSS COMMUNICATIONS WITH OLE PROJECT**
3. OLE partnership updates:
 - a. OLE Board (Dean)
 - b. OLE Functional Council (Xin, with Jim as backup)
 - c. OLE Technical Council (Chris, with Holly as backup)
4. Any questions related to SME team notes from Deb and Naun? Anything to add?
5. Discuss [test plans](#) progress.
6. Review second draft of schedule task list.
7. Other items for discussion?
8. What's next?
 - a. Continue generating [test plans](#) from requirements.
 - b. Assign dates to [schedule task list](#).
 - c. Agile and JIRA "training."

Notes

Announcements

Naun, Adam, and Jesse met with Kristen in Chicago regarding the ceasing of ERM functionality in OLE—don't want to develop now and then do it all over again.

Action Items

See comments above in AGENDA.

OLE Partnership Updates

The OLE Board and OLE Technical Council have not met since our last OLE team meeting. The OLE Functional Council met last week for a demo of GOBI API (which several of us attended). They also discussed housekeeping issues such as when to meet, empty committee positions, etc.

SME Team Status

Deb sent a summary of the Deliver SME Team meeting.

Naun sent out a summary if the Describe SME Team meeting.

Test Plans Progress

Deb needs to focus on Circ Rules first.

Ann has her test plan together—she will post it on the wiki.

Jesse needs to pull the two Voyager test plans together—Holly offered to help his sub-team do that.

Schedule Task List.Second Draft

Not ready, but Chris and Holly are meeting today to work on this.

Other Discussion Items

Chris demoed some aspects of OLE, including accounts and roles.

Next

See comments above in AGENDA.

Action Items

- Deb will keep working on Circ Rules with her sub-team.
- Jesse will start combining the existing Voyager test plans to produce one that covers everything.
- Holly will meet with Chris to update the schedule task list.
- Holly will create a project schedule using the schedule task list.
- Dean, Chris, and Holly will prepare a combined presentation for the OLE kickoff meeting.
- Holly will plan Agile and JIRA "training."

2016-02-19

Attendees

Ann, Chris, Dean, Deb, Jesse, Holly, Kizer, and Naun

Regrets: None

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Announcements	Holly	None	None
9:05	Action Items from last meeting: <ul style="list-style-type: none"> • Deb will keep working on Circ Rules with her sub-team.–IN PROGRESS • Jesse will start combining the existing Voyager test plans to produce one that covers everything.– JUST UPLOADED BEGINNING EFFORT • Holly will meet with Chris to update the schedule task list.– WILL DISCUSS LATER IN AGENDA • Holly will create a project schedule using the schedule task list.–WILL DISCUSS LATER IN AGENDA • Dean, Chris, and Holly will prepare a combined presentation for the OLE kickoff meeting.– MEETING AT 10AM • Holly will plan Agile and JIRA "training."– NOT STARTED 	Holly	See comments at end of action items. Circ Rules turning out to be even more complicated than we thought–taking a philosophical approach. They looked at both the Chicago and Duke models. Trying to get away from Circ Rules by type of item (e.g. book, tape).. Use loan periods instead, such as "regular loan." Kornelia is supportive of this approach. Jesse uploaded start of test plans earlier today.	Deb and her team will continue working on Circ Rules.
9:10	OLE partnership updates: <ul style="list-style-type: none"> • OLE Board (Dean) • OLE Functional Council (Xin, with Jim as backup) • OLE Technical Council (Chris, with Holly as backup) 	Dean, Holly, and Chris	Dean: Mike Winkler recently met with IndexData, EBSCO, and GOKb in Copenhagen. They discussed the planned architecture and how OLE partnership will participate. Mike will be sending more supporting document. Holly: Nothing to report from Xin. Chris: Learned at a high level what IndexData is doing now. Discussed what would make building an new LMS worthwhile. Build LMS in modules so that others can build "apps" that would integrate easily with the LMS modules. Plan to have a prototype this summer that other developers could use to build functions on. By 2017 will have a functional proof of concept system. Probability of us being able to deploy this in 2017 is very low. We would need to wait a year or possible two. Their team consists of 12 developers, 2 librarians, 2 UX people, a project manager, and a product owner. Talk about having APIs to use brought up the issue of needed direct access to the data. They were receptive to this.	None
9:20	Any questions related to SME team emails? Anything to add?	Holly	Email reports were sent out by all 4 representatives on SME Teams. Jesse brought up issue of slowness of tools–a second per record. Some batch processing has sped up.	None
9:25	Discuss plans for Monday's project kickoff meeting	Holly	Dean, Chris, and Holly will do a joint presentation. Meeting after this meeting to plan out presentation.	Dean and Chris will add slides to the PowerPoint Holly started.
9:30	Discuss project schedule approach	Holly	Dean: need to add that the backlog that has built up needs to be processed during the Post-Implementation Phase. Chris: 3.0 will be released this spring.This should give us a good amount of time to test, even if 3.0 slips a bit.	Holly will add backlog to Post-Implementation Phase.
9:45	Discuss test plans progress and questions	Holly	See comments above from Jesse.	Everyone will

			<p>Deb is talking about starting some testing now rather than waiting for Circ Rules to be done. She will get the steering group together to talk about this.</p> <p>Naun hasn't posted anything but he is taking a similar approach to Jesse. He is doing more of a gap analysis at this time.</p> <p>Ann had test plan reviewed by her team and will post it on our wiki.</p>	<p>continue working on test plans for their module.</p>
9:50	Other items for discussion?	Holly	<p>Naun asked about state of test instance. Chris said that it is pretty much out of the box. Testers should report errors to Chris so he can figure out why it's not working.</p>	None
9:55	<p>What's next?</p> <ul style="list-style-type: none"> • Continue generating test plans from requirements. • Assign dates to Implementation Phase. • Agile and JIRA "training." 	Holly	None	None

2016-02-26

Attendees

Ann, Chris, Dean, Holly, Kizer, and Naun

Regrets: Deb and Jesse

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Announcements	Holly	None	
9:05	<p>Action Items from last meeting:</p> <ul style="list-style-type: none"> • Deb will keep working on Circ Rules with her sub-team.--IN PROGRESS • Everyone will continue working on test plans for their module.--IN PROGRESS • Dean and Chris will add slides to the PowerPoint Holly started.--COMPLETED • Holly will plan Agile and JIRA "training."--NOT STARTED • Holly will add backlog to Post-Implementation Phase.--COMPLETED • Assign dates to Implementation Phase tasks.--WILL DISCUSS LATER IN MEETING 	Holly	See comments at end of action items.	
9:10	<p>OLE partnership updates:</p> <ul style="list-style-type: none"> • OLE Board (Dean) • OLE Functional Council (Xin, with Jim as backup) • OLE Technical Council (Chris, with Holly as backup) 	Dean, Holly (for Xin), and Chris	<p>Dean: OLE Board is meeting face-to-face on Monday and Tuesday.</p> <p>Holly:</p> <ul style="list-style-type: none"> • E-Acq recommends suspending work on ERM functionality, including work on e-resources and platform record. Licensing functionality for 3.0 would not be coded. • SOAS has reviewed the essentials for the functionality by 3.0. These are: (1) hold details of license and access arrangements per resource/database (2) allow better management of payments to vendors (invoice status links) (3) allow reporting on, upcoming license renewals, payment status, funds available, among others. • Motion to suspend ERM functionality work with the exception of OLE 5666 and OLE 2700 as needed by SOAS. FC approves motion. • Why does Functional Matrix not include Cornell people? <p>Chris: Discussed IndexData presentation from previous week. Everyone is in agreement that it is goodness.</p>	Everyone should look at Functional Matrix and sign up for appropriate areas,
9:20	Any questions related to SME team emails? Anything to add?	Holly	<p>Email reports were sent out by Deb and Naun.</p> <p>The System Integration SME Team did not meet this week.</p>	Jesse will send his out shortly.
9:25	Discuss test plans progress and questions	Holly	<p>Ann: Done, just need to be put on wiki.</p> <p>Deb: Not in attendance.</p> <p>Jesse: Not in attendance.</p> <p>Kaiser: Will just be adding some annotations to Jesse's plan.</p> <p>Naun: Went through high-level requirements and started thinking about work flows that will be needed.</p>	
9:30	Review implementation schedule	Holly	In summary, would need to start Implementation Phase in August 2016 to implement in July 2017. This will be returned by one or two months when the schedule is changed to make the integration testing happen at the same time as the functional testing.	Change Integration testing to be simultaneous to functional testing.
9:40	Other items for discussion?	Holly	None	
9:50	<p>What's next?</p> <ul style="list-style-type: none"> • Continue generating test plans from requirements. • Continue working on Circ Rules. 	Holly	None	

- Conduct Agile and JIRA "training."

2016-03-04

Attendees

Ann, Chris, Dean, Deb, Holly, Jesse, and Kizer

Regrets: Naun

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Announcements	Dean	See Dean's comments below with the OLE partnership updates..	
9:05	Action Items from last meeting: <ul style="list-style-type: none"> Everyone should look at Functional Matrix and signup for appropriate areas. 	Holly	We have decided to back off on this due to the recent changes in the OLE partnership. Right now that SME Team leads are the contacts and that is fine for now.	
9:15	OLE partnership updates: <ul style="list-style-type: none"> OLE Board (Dean) OLE Functional Council (Xin, with Jim as backup) OLE Technical Council (Chris, with Holly as backup) 	Dean, Holly (for Xin), and Chris	<p>Dean: OLE Board met face-to-face on Monday and Tuesday. Went well. Everyone agreed on direction to go in. IndexData has started development and will have the base ready in July of this year. MOU is being generated at this time. Cornell, UPenn, Duke, and Texas A&M will be cohorts implementing in July 2018. HTC will focus on fixing pain points for those libraries already use OLE rather than development for the larger libraries. IndexData has 12 developers and there will be 12 more from the partners.</p> <p>Holly: Nothing to report.</p> <p>Chris: Talked about reaction to Duke decision. IndexData called in again to talk about their plans. Discussed various database options, etc.</p>	
9:25	Any questions related to SME team emails? Anything to add?	Holly	None	
9:30	Any questions or updates related to test plans ?	Holly	None	
9:35	Review new implementation schedule	Holly	In summary, CUL would need to start Implementation Phase in October 2017 to implement in July 2018. This assumes the current staffing level and no advanced testing (since we cannot currently plan for this). Given that the OLE developers will be using the Agile approach there will be modules to test over the months of development leading up to the final December 2017 release of OLE Phase 2. We will keep up with the testing and start the documentation so that we are ready to move forward with final testing and conducting training during the January to June 2017 time frame.	
9:40	Introduction to Agile approach	Holly	<p>Holly went through a brief PowerPoint presentation,</p> <p>Dean read the Agile points discussed at the OLE Board meeting. Development team needs to be empowered. Finish a function before moving on, but don't try to perfect what is created (80/20 rule).</p>	
9:45	Other items for discussion?	Holly	<p>We discussed how the recent OLE changes impact CUL.</p> <ul style="list-style-type: none"> The CUL OLE project team will meet every other week instead of weekly. We will mostly need to keep up on what is happening within the SME Teams and how the development is going. CUL's involvement with the development of OLE Phase 2 will be determined after the partnership has a chance to reorganize. CUL will need to run Voyage for an extra year. This means paying for a year of Voyager maintenance and upgrading to Voyager 9. 	

			Overall this the recent developments are positive.	
9:50	<p>What's next?</p> <ul style="list-style-type: none"> • Continue generating test plans from requirements. • Continue working on Clrc Rules. • Conduct JIRA "training." 	Holly	<ul style="list-style-type: none"> • Deb's group will continue working on the Circ Rules, Sign On Rules, etc. Luckily they will have more time now. • The test plans are at a good point for right now. As Jesse said, we can try them out on the Voyager 9 upgrade. • We will hold off on the JIRA training until we are closer to using it (unless someone is anxious to learn about it now).. 	

2016-04-08

Attendees

Ann, Chris, Dean, Deb, Holly, Jesse, Kizer, and Naun

Regrets: None

Discussion Items

Time	Item	Who	Notes	Actions
9:00	Announcements	Holly	None.	
9:05	OLE Board Update	Dean	<ul style="list-style-type: none"> OLE Board met on Tuesday and approved the budget going forward. The MOU is in EBSCOS hands. The Mellon Grant will be re-purposed. A group of SME Leads is heading to Copenhagen to meet with IndexData. 	
9:15	SMEs for New Project <ul style="list-style-type: none"> Jesse & Adam: E-Resource Management/Aquisitions Deb: Deliver Naun: Authority Any developments?	Jesse, Deb, Naun	Naun reports that there have been two Authority meetings, but not part of any "official" group.	
9:20	What is status of Open Forum? (SME Team Leads met 3/30 to plan Open Forum.)	Holly	Don't know—we are still working on how to best form a relationship with EBSCO and IndexData.	Holly has emailed Mike Winkler to find out about this.
9:30	What is status of request to Mike Winkler regarding upcoming EBSCO User Group?	Holly	See email provided as third comment below. Dean hasn't received a response.	Holly has emailed Mike Winkler to find out about this.
9:40	How does OLE get its voice into what gets produced?	Holly	See emails provided as first and second comments below. Until the MOU is signed, not much can be publicly said about OLE's partnership with EBSCO and, therefore, IndexData.	
9:50	Other items for discussion?	Holly	None.	

2016-05-13

Attendees

Ann, Chris, Dean, Deb, Holly, Jesse, Kizer, and Naun

Regrets: None

Discussion Items

Time	Item	Who	Notes	Actions
3:00	Announcements	Holly	Skipped.	None.
3:05	OLE Board Update	Dean	Not able to document.	None.
3:10	EBSCO User Group meeting information	Jesse	<p>Highlights:</p> <p>60+ LMS in world—only 3 in US now.</p> <p>EBSCO will help smaller libraries who can't host the LMS themselves.</p> <p>TEND will be offering up different Open Source modules that hook in—no info on the specific modules yet.</p> <p>TEND already has a module for Research Data Management, Institutional Repository Tool. etc.</p> <p>Texas A&M talked about need for new tools.</p> <p>Chicago has been a major player in ERM.</p> <p>Basic platform will be available in August.</p> <p>Talk about open metadata sources as replacement to how we make copies of catalog records now.</p> <p>Will be managed open source, with people qualified to make changes.</p> <p>Commercial vendors will be able to plug their apps in. That is whole idea.</p> <p>Behavior Bureau ran two workshops with goal to tease out where they should go beyond the LMS. What do we and our users want that LMS can't provide? People are looking for flexibility and interoperability. Want to take advantage of linked data. Allow for cataloging in other than Marc. Kristin Martin will offer a similar session for the OLE team.</p>	<p>Jesse will write up his notes.</p> <p>Jesse will find out when Kristin Martin's workshop will be.</p>
3:30	Does anyone have information about the Community Forum? (It is tentatively scheduled for May 25th.)	Holly	Will be May 19 at 10am. Mike Winkler is leading meeting.	None.
3:40	Other items for discussion?	Holly		None.

OLD Meeting Notes - Other

- [2015-11-06 Meeting with UPenn](#)
- [2015-11-10 Meeting with Duke](#)
- [2015-11-11 & 12 Kualii Days 2015](#)
- [2016-03-09 Code4Lib IndexData Presentation](#)
- [2016-05-12 Project Manager Overview Meeting with Mike Winkler](#)
- [2016-05-16 Project Manager Transition Meeting](#)
- [2016-05-19 OLE Status Update By Mike Winkler](#)

File

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2015-11-06 Meeting with UPenn

Attendees

Cornell: Chris Manly and Holly Mistlebauer

UPenn: Mike Winkler and Bob Pershing

Questions

1. Where is UPenn in process?
2. When is 2.0 coming out? What about 3.0?
3. Is CUL's implementation date reasonable?
4. What help can they provide in migration from Voyager to Ole?
5. What documents do they have to share with us? Project schedule? Test plans?
6. Anything else?

Answers

1. UPenn is implementing Summer of 2016.
2. Roadmap doesn't reflect current reality.
 - a. 1.6.2 was tagged this week.
 - b. 2.0 is tagged for this month.
 - c. 3.0 release code will be available to UPenn in January so that they will have 6 months to test prior to implementation.
3. **Yes, our date is reasonable.** One challenge we will encounter is that the documentation isn't like it would be for a vendor product.
4. Migration help:
 - a. They will be sharing a spreadsheet that describes what to do in what order with regard to the data. They also will give Chris access to Kettle files that were written for migration from Voyager to OLE. They are in a BOX folder.
 - b. There are decisions we need to make/things we need to know:
 - i. **Have to decide what we are going to do with patrons. In OLE you can have two groups: patrons and persons.** The distinction is between patron activities and staff activities. Staff would have one account for doing staff-related work and another for when they are patrons. Or could have everyone as a patron and give staff special privileges within that group. If staff end up as patrons and persons, be aware that the accounts are not connected. One institution decided to go with everyone being a patron. UPenn hasn't decided yet. OLE does allow for shared accounts that aren't authenticated through the campus system.
 - ii. **OLE allows for tiered locations, although you can elect to remain with one.** Need to decide what we want to do.
 - iii. Fund accounting includes reused code from Kualii accounting system. This is much more robust than the average LMS.
 - iv. **Can't migrate Circ Rules from Voyager to OLE, will need to re-enter everything.** UPenn sees this as a good opportunity to re-visit the rules. How have they worked?
 - v. Bibno starts at 10000000 for OLE. If you want to preserve the Bibids from Voyagers, make sure you do that from the start. It will be too late after you have loaded some records.
5. As mentioned above, UPenn will be sharing a spreadsheet that describes what to do in what order with regard to the data. They will also share:
 - a. JIRA Structure
 - b. Wiki
 - c. Test Plans (when they are ready in a month or two)
 - d. Project Structure
 - e. Time Line
 - f. Anything else they come up with
6. Other stuff:
 - a. **Everything we create should be created with sharing in mind.**
 - b. **We need to have a fully loaded OLE database 6 months before implementation to use for testing and training.**
 - c. One of our contributions could be helping with fine-tuning and debugging.
 - d. We should speak up if we have any recommendations for OLE.
 - e. Fiscal rollover takes about an hour.

Action Items

- Holly will give Mike and Bob read access to our wiki.
- Bob will send me documentation, give us access to their wiki, etc.
- Holly and Chris will meet with them again in 2 weeks or so after we have reviewed material from UPenn.

2015-11-10 Meeting with Duke

Attendees

Cornell: Chris Manly and Holly Mistlebauer

Duke: Tim McGeary (had conflict) and Mohamed El Quirdi

Questions

1. Where is Duke in process? Which release are they implementing?
2. What documents do they have to share with us? Project schedule? Test plans?
3. Any advice, got yours, etc. to share with us?
4. Anything else?

Answers

1. Currently using Ex Libris Aleph. July 2016 they plan to go live with OLE 3.0 (different from what is listed on the Roadmap). In the end they will have spent 18 months. Originally planned on doing a staggered implementation but that didn't work out too well. They could go live with the Delivery module but decided to wait for 3.0.
2. Mohamed took approach that is a mix of regular project management and Agile. They have a milestone list that they maintain. They had to manage risks very closely. Each functional area has done their own scheduling in the way they want. Mohamed will send us their milestone list and risk register, plus he will give us access to BaseCamp so we can see their tasks. Mohamed also mentioned that there is installation information within the 1.6 documentation. They are doing the minimal documentation but will go back while training documentation is being put together.
3. Advice:
 - a. Buy-in from functional staff is critical—it's a different mindset.
 - b. Being familiar with KFS is a big plus, but there are still some differences--this was a struggle for Duke.
 - c. They had an 18 month implementation as well. Our plan is reasonable.
 - d. They are attempting to migrate the data the "right way", using the APIs. They struggled a lot, but eventually it worked out.
 - e. We are concerned about performance--Mohamed says that Chicago has had performance issues.
 - f. Duke still needs to learn more about SOLR--we should be o.k. there.
 - g. Duke reserves physical items too--Chicago is using ARES for this. Chris didn't realize ARES does this. Do they?
 - h. **Make sure resources have time to do the testing.**
 - i. **Load data ASAP into a test instance so staff can see how this will work--do dog-and-pony shows on different parts.**
 - j. Be flexible!
 - k. **Find lacking functionality ASAP.**
4. Other:
 - a. Using Docker to create local environment--easier to deploy.

Action Items

2015-11-11 & 12 Kuali Days 2015

File

Modified 

Microsoft Word Document KualiDays_2015_Report.docx
Jim's Report

Nov 18, 2015 by Holly L.
Mistlebauer

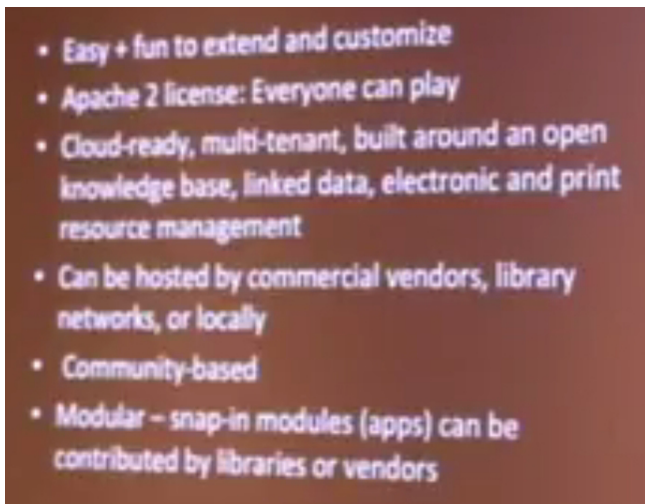
Drag and drop to upload or [browse for files](#)

2016-03-09 Code4Lib IndexData Presentation

Talk should be available at https://www.youtube.com/results?search_query=code4lib

Key points from Sebastian Hammer's presentation...

- 1) Announced that IndexData is working with EBSCO—if it was a secret it isn't anymore.
- 2) Mentioned that Quali OLE started out with a new approach and ended up developing just another ILS.
- 3) This time around we will use more current technologies and more aggressively engineer OLE.
- 4) Initial focus will be on research libraries.
- 5) IndexData had difficulty deciding what programming language to use so they went to EBSCO—EBSCO told them to figure it out (good sign).
- 6) What is being developed is not an ILS—it's a Library Platform.
- 7) Signup at futureisopen.org to be notified when website is available—they don't know what to call it right now.
- 8) Never mentioned the libraries involved except to say at the very end that Mike Winkler was his partner—I don't think he even said who Mike represents.
- 9) Key considerations:



2016-05-12 Project Manager Overview Meeting with Mike Winkler

Attendees: Mike Winkler and Holly Mistlebauer

Purpose

Holly has been asked to step in as a temporary project manager of the overall OLE effort. The purpose of this meeting was for Mike to explain what I will need to do.

Notes

Like University of Pennsylvania, Indiana University is pulling back on partnership.

Four IU employees are signed employees to the partnerships (they have PSAs):

- Heather (Project Manager)
- Megan (Operations Manager)
- Rick (Quality Assurance)
- Nora (Business Analyst)

Per their agreement, IU gave 30 days notice on May 10th. Rick will stay on until he retires on June 30th. Nora will probably stay until June 30th as well. Mike hopes to negotiate to keep Megan until June 30th and allow Heather to leave earlier.

Development contract with HTC ends on June 30th. The implementation is scheduled for June 13th. After June 30th, we will have a support contract with HTC in order to get bugs fixed. There will be no more development after that. HTC has 5 developers working full-time on OLE 3.0. They have 900+ hours of work left (each task is padded with 10 hours to cover corrections resulting from QA). The developers are managed by Harry, an HTC employee who works out of Boston.

OLE 3.0 will be implemented by:

- Lehigh University
- University of Chicago
- SOAS (London)

(Note: They are all using OLE already--will migrate to 3.0.)

Will start hiring developers shortly. It is estimated that we will hire 3-9 developers, which Mike thinks will end up being 7. The developers will be paid from the Mellon Grant/Partner Fees. They will be located all over. Any of the partners could hire someone and get paid back by Duke.

I will meet with Heather on Monday (May 16th) to learn what I need to do. Then I will shadow her until she leaves. Finish OLE 3.0 will require about 50% of my time. The other time I have available will be used to help with the transition to EBSCO/IndexData.

2016-05-16 Project Manager Transition Meeting

Attendees: Mike, Heather, and Holly

Notes

2016-05-19 OLE Status Update By Mike Winkler

Listen to meeting recording at <https://meetings.webex.com/collabs/url/u097paRlbwo5jjOqVqDailoVQXt4OmDxTKfzdHhOE0C0000>

or read the meetings notes [here](#).


OLD OLE Documentation

Partnership

- [OLE Partner Local System Information](#)
- [OLE Published Documentation](#)
- [OLE Functionality By Module](#)
- [OLE Roadmap](#)
- [OLE Test Drive](#)


Implementers

- [Duke University Documents](#)
- [University of Chicago Documents](#)
- [University of Pennsylvania Documents](#)

File	Modified 
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Duke University Documents

Going live with FOLIO in July 2018!

File	Modified 
Microsoft Word Document Duke OLE critical functionality.docx	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document Duke OLE Fit-Gap Report.docx	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document Duke Local Test Instance planning.docx	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document ToDos from BaseCamp.docx	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word 97 Document OLE Project Management Plan.doc	Jan 13, 2016 by Holly L. Mistlebauer


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University of Chicago Documents

Went live with OLE 1.5 in July 2014!

Go to <http://www.lib.uchicago.edu/staffweb/depts/ils/kuali/index.html> to see all Chicago documentation

File	Modified 
Microsoft Word Document Talking points for OLE.docx Information about when they implemented, etc.	Jan 13, 2016 by Holly L. Mistlebauer
PDF File ChicagoCataloging Requirements.pdf Cataloging Requirements	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word 97 Document ChicagoAcqSerialsRequirments.doc Serials Acquisitions Requirements	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word 97 Document ChicagoAuthorityRequirements.doc Authority Requirements	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word 97 Document ChicagoCirculationRequirements.doc Circulation Requirements	Jan 13, 2016 by Holly L. Mistlebauer
File Chicago - Current Dataloads that need to be replicated in OLE.url This is the URL to the content	Jan 13, 2016 by Holly L. Mistlebauer
File Chicago - Initial testing of migration.url This is the URL to the content	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document Chicago - Kuali Circulation Migration Transition Planning Report final.docx Circulation Migration Plan	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document Chicago - HorizonOLEFieldMappingcopyitemserials.docx Serials Field Mapping	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document ChicagoOLEtrainingplan.docx Training Plan	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Word Document CHICAGOMILESTONESJun5rev.docx Milestones	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Excel Spreadsheet OLEProjectPlanUCHICMay2014.xlsx Project Plan	Jan 13, 2016 by Holly L. Mistlebauer

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University of Pennsylvania Documents

Dropped out of partnership in 2016!

Waiting for receipt of documents from UPenn...

OLD OLE Groups


- OLE Functional Council--ceased
- OLE SME Teams--ceased
- OLE Technical Council--ceased

OLE Functional Council--ceased

CEASED MARCH 2016

Primary Representative: Xin Li

Backup Representative: Jim LeBlanc

File	Modified 
PDF File OLECommunicationsSMEGroup-Charge.pdf	Jan 06, 2016 by Holly L. Mistlebauer
PDF File MinutesKualiOLEFC2016-02-01.pdf	Feb 23, 2016 by Holly L. Mistlebauer
PDF File MinutesKualiOLEFC2016-02-08.pdf	Feb 23, 2016 by Holly L. Mistlebauer
PDF File MinutesKualiOLEFC2016-01-04.pdf	Mar 02, 2016 by Holly L. Mistlebauer
Microsoft Word Document FCOrientation.docx Orientation document given to Xin	Mar 02, 2016 by Holly L. Mistlebauer
PDF File KualiOLE FC2016-03-07 min.pdf	Mar 25, 2016 by Holly L. Mistlebauer
PDF File KualiOLE FC2016-03-21 draft minutes.pdf	Mar 25, 2016 by Holly L. Mistlebauer

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OLE SME Teams--ceased

CEASED MARCH 2016

OLE SME Team List

Subject-Matter Expert (SME) teams for CUL to join:

- Deliver *Deb and Joanne (with Cammie and Caitlin as backups)*
- Describe (has a sub-group for Authority Control) *Naun (we are allowed to have two people)*
- Select/Acquire (has sub-groups for Serials, Licensing, and E-Acquisitions) *Jesse (we are allowed to have two people)*
- Systems Integration *Chris and Alan*


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OLE Technical Council--ceased

CEASED MARCH 2016

Primary Representative: Chris Manly

Backup Representative: Holly Mistlebauer

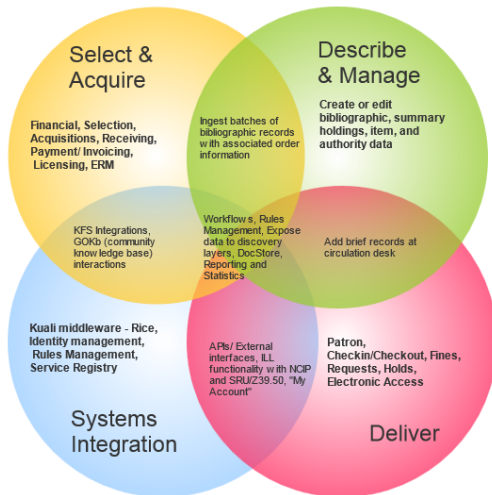
File	Modified 
<p>No files shared here yet.</p> <p>Drag and drop to upload or browse for files</p>	

OLD Presentations Given By CUL Staff

File	Modified 
Microsoft Powerpoint Presentation OLE Implementation Project Overview_2016-02-08.pptx Presentation to CUL IT at "All Hands" meeting on 2/8/2016	Feb 08, 2016 by Holly L. Mistlebauer

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OLD Team Spaces




- Select & Acquire Team
- Describe & Manage Team
- Deliver Team
- Systems Integration Team
- Who is doing what on the FOLIO project?

Deliver Team

Related Material

- [Circ Rules](#)
- [Patron Blocks](#)
- [Description](#)
- [Requirements](#)
- [Staffing](#)
- [Test Plan](#)

File	Modified 
Microsoft Word Document Chicago - Kual Circulation Migration Transition Planning Report final.docx	Jan 13, 2016 by Holly L. Mistlebauer

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Circ Rules

File

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Patron BlocksJL

Patron Blocks

- Faculty/Staff/Students are blocked for:
- One overdue recall
- \$300 in unpaid fines
- Three lost items
- 100 overdue items

- Library Card, Privilege Card, SUNY Card Holders
- One overdue recall
- \$150 in unpaid overdue fines
- One lost item
- 20 items borrowed
- 20 overdue items

CU Partners (BD +, 2CUL)


- One overdue recall
- \$300 in unpaid fines
- Three lost items
- 100 overdue items

Describe & Manage Team

Related Material

- [Description](#)
- [Requirements](#)
- [Staffing](#)
- [Test Plan](#)

Sub-Sections

File	Modified 
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Select & Acquire Team

Related Material

- [Description](#)
- [Requirements](#)
- [Staffing](#)
- [Test Plan](#)

Sub-Sections


File	Modified ▲
<p>No files shared here yet.</p> <p>Drag and drop to upload or browse for files</p>	

Systems Integration Team

Related Material

- [Description](#)
- [Requirements](#)
- [Staffing](#)
- [Test Plan](#)

Sub-Sections

File	Modified 
Microsoft Word Document Chicago - HorizonOLEFieldMappingcopyitemserials.docx	Jan 13, 2016 by Holly L. Mistlebauer
File Chicago - Current Dataloads that need to be replicated in OLE.url	Jan 13, 2016 by Holly L. Mistlebauer

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Who is doing what on the FOLIO project?

Contact	Roles	Areas of Knowledge/Responsibility	Comments
Sharon Beltaine	Reporting SIG Convener; Data Migration Sub-Group member	reporting, data migration, data warehouse, data model, reporting applications	
Gary Branch	Batch Loader subgroup	migration, data import and export	Retiring prior to implementation?
Darcy Branchini	UX/UI Designer; Product Owner		
Zak Burke	OLE Developer on the Core Functional Team		Paid by OLE and administered by Cornell—works remotely
Adam Chandler	Privacy SIG member		
Jenn Colt	Metadata Management SIG member	metadata operations	
Matt Connolly	Core Functional Team Developer		
Ann Crowley	Resource Management SIG member, Acquisitions small group	finance, acquisitions small group	
Greg Delisle	Sys Ops & Management SIG member		
Robbie Douglas	Sys Ops & Management SIG member		
Erin Faulder	Special Collections and Archives Working Group member		
John Ferreira	ERM Developer		
Debra Howell	FOLIO Implementation Project Director/Project Manager	project management	As of March 2019
Jesse Koennecke	Product Council Vice-Chair (as Cornell Representative)		
Zsuzsa Koltay	OLE Marketing Team member		
Jason Kovari	Metadata Management SIG member	metadata, cataloging	
Michal Kuklis	OLE Developer on Core Functional Team		Paid by OLE and administered by Cornell—works remotely
Deb Lamb	Resource Access SIG member; Privacy SIG member; User Management SIG Member	circulation, security/permissions,	Retiring June 1, 2019
Joanne Leary	Resource Access SIG member; Reporting SIG member	circulation, sysadmin (circ, security), reporting	
Peter McCracken	Resource Management SIG member	e-resources management; member of RM SIG, RM SIG eHoldings subgroup, RM SIG ERM subgroup	
Mary Beth Martini-Lyons	Discovery representative to project		
Holly Mistlebauer	OLE Steering Committee member; FOLIO Product Owner; OLE Project Manager; Product Council member (as OLE Project Manager); Member of FOLIO Capacity Planning Group; FOLIO Gap Analysis/Feature Prioritization Coordinator	project management, gap analysis, capacity planning, development, communication, planning, fees/fines. resource access apps	
Phil Robinson	User Management SIG member, Sys Ops and Management SIG member, CUL integration implementation lead	integrations. supervisory responsibility for test instance deployment work and reporting /warehouse work	
Sarah Ross	Metadata Management SIG member, MARCcat subgroup	cataloging	Retired, October 2019
Pam Stansbury	MARCcat subgroup	cataloging	
Melissa Wallace	Accessibility SIG member		

Frances Webb	ERM Developer		
Wendy Wilcox	Resource Access SIG member; Course Reserves SIG member		
Laura Wright	Metadata Management SIG convener; Forum Facilitators Group member	cataloging	at Cornell as of July 1, 2019

Project Management Transition to Debra

Housekeeping

- Everything you need to know about the FOLIO and the implementation at CUL is available on [this wiki](#)
- The CUL FOLIO Implementation Team e-list is cul-folio-implementation-l@cornell.edu
- The CUL FOLIO Implementation Slack channel is [#folio-implementation](#)
- The CUL FOLIO Implementation team has been meeting at 9:00 AM on Tuesdays
 - The current Outlook meeting runs out on March 12, 2019
 - This time doesn't work for Darcy, who recently joined the team, so a new time needs to be found
 - Holly will no longer attend the meetings unless invited by Debra, which should open up available meetings times
- Should Debra and Holly have regular meetings? Holly is the OLE Project Manager, so she is on the OLE Steering Committee and FOLIO Gap Analysis/Capacity Planning Team and often has valuable information to share (Holly is also on the FOLIO Product Council, but so is Jesse)
- Account numbers
 - Endowed Account: L853735
 - Statutory Account: L833735

Orientation

Become familiar with the...

- [CUL FOLIO Implementation Project wiki](#) (this one)
- [FOLIO project wiki](#)
- [FOLIO Implementation Group wiki](#) (new group Debra will be member of)

FOLIO Implementation-Related Activities

The larger FOLIO project has several implementation-related activities that CUL participates in, including:

- **Systems Operations & Management SIG**
 - Greg Delilse and Robbie Douglas (who both report to Phil) are members
 - Read the SIG's charge [here](#)
- Systems Operations & Management SIG's **Data Migration Sub-Group**
 - Sharon Beltaine (who reports to Phil) is a member
- **FOLIO Implementation Group**
 - This is a new group that Debra will be CUL's rep on (with Jesse's help initially)
 - Read [About the Group](#)
 - Follow these [on-boarding steps](#)

CUL FOLIO Implementation Status

The following activities need to be picked up by Debra as the new Project Manager:

- **Staffing Details** : Holly has made updates per the recent additions of Debra and Phil and passed these changes to Ezra. Now need to generate alternate plan that reflects the impact of using EBSCO implementation services (as started in [columns G & H](#)) and get estimates from EBSCO. Check into Indexdata and others as well? This part will wait for Debra. Also, we asked for a 1.0 FTE project manager and Debra is .5 FTE. Holly updated the plan to ask for an additional .5 FTE project management assistant for Debra. Tahir is interested in this position, but Debra should decide what she really needs.
- **Implementation Plan**: Right now we have a list of [implementation tasks](#) that Holly planned to load into Open Project and turn into an implementation plan. This has been on the back burner because of the high priority given to Staffing Details. Holly is concerned about doing this before Debra arrives because as a Project Manager she know that every PM has their own way of doing plans--Debra may even have a template she uses or she may have access to a better tool through her CIT connections.
- **EBSCO/Indexdata Migration Services**: Debra should spearhead the evaluation of whether we use some or all of EBSCO's/Indexdata's migration services.
- **EBSCO/Indexdata Hosting Services**: Debra and Phil should work together, with the Library Systems team, to determine if EBSCO/Indexdata hosting is a viable solution for CUL.
- **Monthly Report to CUL**: Holly has been waiting for the new Community Newsletter to be available (it was due in early January) to create a monthly report to CUL that included the Community Newsletter for overall project news along with a CUL status report. Dean requested that Holly talk to Gerald and Zsuzsa first. Debra can kick off this process--in fact it will be a nice transition to her leadership.
- **Sandbox Release**: We want to have a second project kickoff when we release the sandbox to CUL. As part of the kickoff we would like to have Gerald speak on the importance of the project and it will be a good opportunity to introduce Debra to CUL. Before this happens, we need to have a plan in place for loading CUL data into the Sandbox.
- **Redesign of LStools**: LStools should be redeveloped as a FOLIO app. Rather than replace all of the "tools", we need to determine which are still needed after we migrate to FOLIO. FOLIO will hopefully make the need for some of the "tools" obsolete. Nick, who is in Darcy's group, has been assigned as a .8 FTE to work on LStools. Darcy and Simeon feel that this work should wait until Debra is on-board.
- **Integration Work**: Originally we planned to hire a 1.0 FTE dev to work on both data migration and integration. Instead, we assigned existing CUL IT dev Frances Webb to work .5 FTE on data migration. This means that we still need a .5 FTE dev for integration. Phil has some good ideas for how to address integrations that he will discuss with Debra.
- **User Management SIG**: Need to replace Deb Lamb with CUL-IT person as Cornell rep on this SIG. The rep used to be Chris Manly, so it might make sense for this to be Phil Robinson.

Project Schedule


See [Time Management Plan](#) or [Schedule Baseline](#)

This is what we have been calling the Implementation Plan, which will be built from the [Implementation Task List...](#)

Project Phases

- [Discovery Phase](#)
- [Implementation Phase](#)
- [Post-Implementation Phase](#)

Related Documents

File	Modified 
Microsoft Word Document ToDos from BaseCamp.docx Duke's To Dos from BaseCamp	Nov 30, 2015 by Holly L. Mistlebauer
Microsoft Word Document University of Chicago Implementation.docx Chicago's Implementation Milestones	Jan 12, 2016 by Holly L. Mistlebauer
Microsoft Word Document POSSIBLE TASKS.docx First cut at possible task list	Jan 13, 2016 by Holly L. Mistlebauer
Microsoft Excel Spreadsheet OLEProjectPlanUCHICMay2014.xlsx Chicago's Project Plan	Jan 13, 2016 by Holly L. Mistlebauer
PDF File OLE_Task_List_2016-01-28.pdf First draft of task list for review at 1/29/2016 meeting	Jan 28, 2016 by Holly L. Mistlebauer
PDF File OLE_Task_List_2016-02-05.pdf Second cut at possible task list	Feb 05, 2016 by Holly L. Mistlebauer
File OLE.mpp First attempt at schedule--need MS Project to open this file	Feb 24, 2016 by Holly L. Mistlebauer
Microsoft Word Document OLE_Systems_Integration_2016-02-12.docx Working document from Chris Manly	Feb 24, 2016 by Holly L. Mistlebauer

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Discovery Phase

Overview

The purpose of the **Discovery Phase** is for the project team to become familiar with OLE. This includes both OLE the partnership and OLE the product. This phase will prepare us for the **Implementation Phase**.

Tasks

- Installing test version of OLE
- Reviewing OLE documentation
- Trying out various functions of OLE to become familiar with the product as well as spot glaring issues
- Documenting and communicating discovered issues with OLE
- Identifying representatives to the OLE Functional Council and OLE Technical Council and attending meetings
- Identifying representatives of the OLE Subject Matter Expert (SME) teams and attending meetings
- Identifying Voyager interfaces that need to be modified to interface with OLE
- Identifying project team members to be liaisons with various CUL groups
- Opening lines of communication with various CUL groups as well as CUL as a whole
- Developing test plans to be used in testing the selected version for implementation
- Developing process for migration of Voyager data to OLE
- Becoming familiar with various customized settings such as Circ Rules, Sign On Rules, tables, etc.
- Working with CUL staff to identify reporting needs
- Working with CUL staff to identify "LS Tools" needs

Deliverables

- Test plans
- Data migration plan
- Customization plan
- Reporting needs
- "LS Tools" needs
- OLE issues list

Implementation Phase

Overview


The purpose of the **Implementation Phase** is to fully test the version of OLE to be implemented and to implement it.

Tasks

- Installing version of OLE to be implemented using full CUL data
- Controlled testing of each module and across modules using test plans
- Documenting and communicating discovered issues with OLE
- Developing, testing, and implementing "LS Tools" replacement
- Developing, testing, and implementing reporting replacement
- Developing, testing, and implementing interface system changes
- Identifying and implementing work flow changes
- Conducting system security scan
- Conducting performance testing
- Creating, reviewing, and distributing documentation
- Creating, reviewing, and conducting training
- Creating plans for launch, backup, recovery, maintenance, and support
- Final migration of Voyager data for implementation

Deliverables

- OLE application (scanned and performance tested)
- Data migration
- "LS Tools" replacement
- Reporting replacement
- Work flow changes
- Documentation
- Training
- Launch plan
- Backup and recovery plan
- Maintenance plan
- Support plan
- OLE issues list

File	Modified 
PDF File OLE_Implementation_Phase_Schedule_2016-02-25.pdf	Feb 25, 2016 by Holly L. Mistlebauer
PDF File OLE_Implementation_Phase_Schedule_2016-02-26.pdf	Feb 26, 2016 by Holly L. Mistlebauer
File OLE.mpp Need MS Project to open this file	Feb 26, 2016 by Holly L. Mistlebauer

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Post-Implementation Phase

Overview

The purpose of the **Post-Implementation Phase** is to fully integrate OLE as a production system within CUL.

Tasks

- Processing backlog from freeze period
- Implementing maintenance and support plans
- Monitoring performance
- Identifying on-going training needs
- Documenting and communicating discovered issues with OLE
- Wrapping up project

Deliverables

- OLE functioning properly
- Ongoing training plan
- OLE issues list
- Project end party


Test Plans

We will be using the [Scrum Methodology](#) for much of the testing.

Haven't started test plans for FOLIO...

Old OLE Test Plans

- [Deliver Test Plan](#)
- [Describe & Manage Test Plan](#)
- [Select & Acquire Test Plan](#)
- [Systems Integration Test Plan](#)

File	Modified 
Microsoft Word Document Duke Local Test Instance planning.docx Duke's steps for creating local test instance of OLE	Nov 30, 2015 by Holly L. Mistlebauer
PNG File Modules.png	Dec 09, 2015 by Holly L. Mistlebauer
File Chicago - Initial testing of migration.url	Jan 13, 2016 by Holly L. Mistlebauer

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Test Plan Example

Test No.	Test Type	Test Name	Purpose of Test	Test Data/Situation	Expected Results	Actual Results	Required Actions
1	Notices	Issue Recall	To show that borrower is notified to return book by a specific date	<ul style="list-style-type: none"> • Check out bibid 123456 for patron 123456789 • Issue recall for patron 987654321 of same item 	Patron 123456789 receives email instructing them to return bibid 123456 in X days		
2	Notices	Recalled Item Returned By Due Date	To show that when book is returned, the recaller is email to pickup book	<ul style="list-style-type: none"> • Check in bibid 123456 by patron 123456789 	Patron 987654321 receives email instructing them to pickup bibid 123456 in Y days		
3	Notices	Recalled Item Not Returned By Due Date	To show that when book is not returned, the borrower is contacted again to bring book in	<ul style="list-style-type: none"> • Need to move date forward X days 	Patron 123456789 receives past due notice for bibid 123456		
4	Notices	Hold Item Picked Up	To show that when item is picked up hold goes away	<ul style="list-style-type: none"> • Check out bibid 123456 for patron 987654321 	Catalog shows bibid 123456 no longer on hold—instead it is checked out to patron 987654321		
5	Notices	Hold Item Not Picked Up	To show that when item isn't picked up during specified period patron is notified that hold is cancelled.	<ul style="list-style-type: none"> • Need to move date forward Y days • Patron 987654321 fails to pick up book 	Patron 987654321 receives notice that hold on bibid 123456 has been cancelled		

Deliver Test Plan

File

Modified 

Microsoft Excel Spreadsheet delivertestingplandraft.xlsx

Jan 28, 2016 by Debra Sue
Lamb-Deans

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Describe & Manage Test Plan

File

Modified 

Microsoft Excel Spreadsheet Describe testing outline - high level.xlsx

Feb 24, 2016 by Disabled Account Chiat Naun Chew

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Select & Acquire Test Plan

File

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Microsoft Excel Spreadsheet Kualiti OLE Select and Acquire_TestingDraft.xlsx

Feb 19, 2016 by Jesse T. Koennecke

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Systems Integration Test Plan

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Topics for Future Meetings

Status	Date Proposed	Proposed By	Possible Date of Topic	Topic Description	Topic Presenter(s)	Notes
New						
New						
New						
New						
New						
New						
New						
New						

User Documentation Plan

The FOLIO Community is supposed to produce end-user documentation, but we will need some CUL-specific documentation...

Types of Documentation Needed

Item Purpose	Audience	Writer/Owner	SME Contact	Start Date	Pub Date	Notes
User Guide						
Quick-Start Guide						
Online Help						
Training Courses						

Instructions for Using Table

- List all of the user and support documentation items for this project.
- Spell out the **purpose** and **audience** for each item. These two elements will have critical impacts on how much has to be written, in what style, at what level of detail; and will also help determine who needs to be involved in documentation reviews.
- Assign both a writer as **Writer/Owner** and a team person as **Subject Matter Expert (SME) Contact**.
 - The Writer/Owner is responsible for driving the writing tasks. They may also design the documentation and write and editing the content; or those tasks may be delegated, depending on the size and nature of the documentation. Regardless, the Writer/Owner is responsible for executing the schedule and ensuring the publications are being created according to spec.
 - The SME Contact is responsible for providing information for the writer through interviews and relevant marketing and product/service /application information. The SME Contact is also responsible for reviewing documentation drafts. The SME Contact may involve other SMEs as needed for all the content to be developed; but the SME is the single-point contact and responsible pto be developed; but the SME is the single-point contact and responsible person.
- Use the **Pub Date** column to indicate when initial printed quantities of the finished item are needed.
- Use the **Start Date** as an estimate when actual work must begin on the item in order to achieve the Pub Date. This will help the publications group identify the overall scope of work and do initial resource planning.
- Use the **Notes** field to call out any special requirements or schedule dependencies for the item that you don't want to forget during detailed planning.

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User Training Plan

Will work on this later in project...

Types of Training Needed

Person/Group	Benefits to Person/Group	Key Features of Training	Scheduled Dates	Comments
All of CUL	Basic general knowledge of FOLIO	FOLIO 101		

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Microsoft Word Document ChicagoOLEtrainingplan.docx
Chicago's Training Plan

Jan 13, 2016 by Holly L.
Mistlebauer

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October FOLIO Friday



October Folio Friday.pdf