

# Metadb Rollout Plan

Status
Complete
On Track
Caution

Instance /Data Source	Target Date	Actual Date	Stage	Activities
1. LDP Production DB with FOLIO Production data  2. Metadb Test DB with FOLIO Test data	October 2023	January 2024	Test and configuration for initial connections to reporting database	<ul style="list-style-type: none"><li>• Hosting Team has Metadb Test reporting database successfully synchronizing data with FOLIO Test application server</li><li>• hosting team sets up accounts on Metadb Test for reporting team members</li><li>• reporting team members verify their connections to Metadb Test through DBeaver EE</li></ul>
	January 2024	January 2024	Announcement to CUL staff about reporting requests	<ul style="list-style-type: none"><li>• Announcement to CUL that Reporting Team will be working on transition to Metadb, so only critical LDP queries or dashboards should be requested</li></ul>
	January 2024	February 2024	Schema setups	<ul style="list-style-type: none"><li>• hosting team sets up accounts for reporting users of specialized <a href="#">local schemas</a> and those users test and verify their connections to Metadb Test</li><li>• hosting team sets up <a href="#">local schemas</a> on Metadb Test, providing access to each of the users for those schemas</li><li>• schema users test access and writing data to their local schemas</li></ul>
	January 2024	March 2024	Voyager Schema for LDP	<ul style="list-style-type: none"><li>• additional Voyager tables are added to LDP Production</li></ul>
	January 2024	February 2024	Metadb Internal Training developed	<ul style="list-style-type: none"><li>• subset of reporting team creates training materials on Metadb to deliver to reporting users</li><li>• Metadb training delivered to reporting team</li></ul>
	January 2024	March 2024	Metadb Test moves to Metadb v1.2.0	<ul style="list-style-type: none"><li>• Hosting team upgrades Metadb Test instance to Metadb v1.2.0 software version, which includes 1.7 Poppy version of Folio Analytics derived tables</li><li>• Reporting Team tests Metadb Test after new version of Metadb software is installed and reports any issues to hosting team</li></ul>
	January 2024	February 2024	Critical Queries for Metadb identified	<ul style="list-style-type: none"><li>• Reporting Team identifies most critical reports to transition from LDP to Metadb first and sets up query development schedule, as well as queries that dashboards depend on</li></ul>
	February 2024	February 2024	Initial User Accounts for Metadb Test	<ul style="list-style-type: none"><li>• Virtual DBeaver and CloudBeaver connection configurations for Metadb are researched and tested</li><li>• Metadb Test setup for initial reporting users researched, tested, and delivered</li></ul>
	February 2024	March 2024	Metadb Training Delivered	<ul style="list-style-type: none"><li>• Metadb training delivered to FOLIO Reporting Users Group</li><li>• Metadb training delivered to all CUL reporting users</li></ul>
	February 2024	May 2024	Poppy Implementation for both FOLIO and Metadb Test	<ul style="list-style-type: none"><li>• FOLIO Production moves to Poppy</li></ul>

	February 2024	Unknown	Voyager Schema for Metadb Test	<ul style="list-style-type: none"> <li>hosting team creates VGER schema and moves legacy system Voyager tables from LDP to Metadb</li> <li>reporting team tests tables in VGER schema on Metadb</li> </ul>
	February 2024	April 2024	First phase of Critical Queries and Dashboard for Metadb completed	<ul style="list-style-type: none"> <li>first phase of critical queries for Metadb are created and tested against Metadb Test with test data</li> <li>first phase of Tableau dashboards for Metadb are created and tested against Metadb Test with test data</li> </ul>
1. LDP Production DB with FOLIO Production data  2. Metadb Test DB with FOLIO Production data	March 2024	May 2024	Metadb Test gets FOLIO Production Data	<ul style="list-style-type: none"> <li>Hosting Team has Metadb Test reporting database successfully synchronizing data with FOLIO Production application server</li> <li>Reporting Team tests Metadb Test with data from FOLIO Production against data from LDP Production to verify accuracy and communicates any issues to hosting team</li> <li>All reporting user accounts in Metadb Test created and distributed</li> </ul>
	March 2024		Second phase of Critical Queries and Dashboards for Metadb completed	<ul style="list-style-type: none"> <li>first phase of critical queries for Metadb are created and tested against Metadb test with production data</li> <li>second phase of critical queries for Metadb are created and tested against Metadb Test with production data</li> <li>first phase of critical dashboards for Metadb are created and tested against Metadb test with production data</li> <li>second phase of critical dashboards for Metadb are created and tested against Metadb Test with production data</li> </ul>
	April - May 2024	October 2024	Final Phase of Critical Queries and Dashboards Completed	<ul style="list-style-type: none"> <li>final phase of critical queries for Metadb are created and tested against Metadb test with production data</li> <li>final phase of critical dashboards for Metadb are created and tested against Metadb Test with production data</li> <li>Reporting Team adds Reporting Tips and Tricks pages in <a href="#">FOLIO Reporting</a> web site to cover Metadb</li> </ul>
	June 2024	September 2024	Reporting App Test	<ul style="list-style-type: none"> <li>Reporting Team configures FOLIO Reporting App to run basic reports against Metadb Test</li> <li>Reporting Team configures FOLIO Reporting App to run reports with parameters against Metadb Test</li> </ul>
1. LDP Production DB with FOLIO Production data  2. Metadb Production DB with FOLIO Production data	July 2024	November 15 2024	Metadb Production Rollout	<ul style="list-style-type: none"> <li>Metadb Test reporting database is cloned from Metadb Production, set up to use FOLIO Production as its data source, and tested by Reporting Team</li> <li>Reporting Team tests queries and dashboards on Metadb Production</li> <li>Metadb Production Go Live is announced to all CU Library staff</li> <li>All critical queries and dashboards use Metadb Production reporting database</li> </ul>
	July 2024	November 2024	Reporting App Rollout	<ul style="list-style-type: none"> <li>Reporting Team configures FOLIO Reporting App to run basic reports against Metadb Production</li> <li>Reporting Team configures FOLIO Reporting App to run reports with parameters against Metadb Production</li> <li>Reporting Users are trained in using Reporting App</li> </ul>
	August 2024	October 18 2024	FOLIO Production moves to Quesnalia	<ul style="list-style-type: none"> <li>impact of Quesnalia changes unknown</li> </ul>
1. Metadb Production DB with FOLIO Production data  2. Metadb Test DB with FOLIO Test data	October 2024	November 30 2024	LDP Production is retired	<ul style="list-style-type: none"> <li>LDP Production is retired</li> <li>Important: Avoid Oct 1<sup>st</sup> due to ADC counts for DFS</li> </ul>

#### Questions and Notes

- What is the cutoff date for CUL staff to ask the reporting team to create LDP queries for them?

- CUL to go to Poppy in February
- Need to determine how long to keep up LDP Production after move from Metadb Test to Metadb Production and who would have access to LDP Production?
- In July, should we have LDP Production remain as our second instance through September 1st instead of have Metadb Test as our second instance?
- If there is a Metadb outage, what happens to the data as synchronization is restarted? (Question for Nassib)

#### Priorities

- queries will be updated for Metadb based on criticality for functional area, candidacy for Report App, and dependencies from dashboards

#### Dependencies

- Automation team needs early access to Metadb Test for automation work and Prefect access
- Annual Data Collection needs a failsafe of LDP Production access through through August 1 to create reports
- FBO needs failsafe of LDP Production access through August 1 to create reports around fiscal year rollover

#### Documentation

- Revise tips and tricks for Metadb