

From Legacy to FOLIO:

Lessons-learned in migrating to FOLIO for Acquisitions

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Outline

- About FOLIO
- Stanford Experience
- Boulder Experience
- Lessons Learned
- Q&A

What is FOLIO?



FOLIO is:

- Open-source library service platform developed by an open community – a collaboration of libraries, developers, vendors, and consortia.



Acquisitions Related Apps

- Inventory
- Orders
- Invoices
- Receiving
- Finance
- Agreements
- Licenses
- Serials



Stanford University Migration Experience



About the libraries

- **Five library institutions**
 - Stanford University Libraries (1 main + 9 branches)
 - School of Medicine, Graduate School of Business, Law
 - Hoover Institution
- **Stanford University Libraries Acquisitions Department**
 - Ordering, Monograph receiving, Serials receiving, E-resources, Digital Licensing, Payments
- **Legacy systems**
 - SirsiDynix Symphony (1997–2023)
 - Voyager

FOLIO migration

- Stanford migrated to FOLIO in September 2023.
- We opted for a **self-hosting** model which had the advantage of having more control, but...
 - It needs sufficient and experienced in-house staff.
 - It's a big effort for Library Systems team.

Timeline

Milestone	Date
Project kickoff	January 2022
Data mapping complete	November 2022
Pre-migration data cleanup complete	December 2022
Workflow & gap analysis complete	March 2023
Development of workarounds complete	June 2023
Staff training & documentation updates	Jan-August 2023
FOLIO goes live	September 2023

Cultural challenges

Time	Staff reaction
Staff informed about the migration decision	Hesitancy, fear of the unknown, uncertainty, attachment
During FOLIO playtime	Complaints, some frustration, varying levels of technical proficiency
During training	More excitement and optimism, adaptation effort
Close to migration	Feeling of being rushed, concerns about efficiency and backlog issues
Post-migration	More confidence but the realization of the hidden complexity of the system

Providing emotional support to staff

- Open communication and transparency
- Well-structured training
- Reducing pressure on staff
 - Adopting a more flexible and lenient approach
 - Prioritizing progress over perfection
 - Not trying to do more with less

Technical challenges

Challenge	Approach
Gaps in functionality	Develop workarounds Implement workflow refinements
Documentation not specific enough	Attend SIG meetings / Contact other institutions Invest in the time to play, test, and explore
Structural complexity of the system & technical constraints	Acquire new technology skills Dedicate considerable time to programming
Time constraints	Start early Build focus groups Work with a highly skilled project manager



University of Colorado Boulder Migration Experience



About the Libraries

- **Libraries:** CU Boulder Libraries & CU Law Library in shared (multi-tenant) FOLIO system
- **Legacy System:** Innovative Interfaces' Sierra

Timeline

Milestone

Date

Decision to migrate to FOLIO as self-hosted

Fall 2020

Originally scheduled FOLIO Migration

July 2022

Decision to move to vendor-hosted & commencing work with Index Data

Summer 2022

Mapping of Acquisitions Data complete

March 2023

Last day to use Sierra

Friday June
16th Noon

Migration from Sierra to FOLIO

June 16-June
18th

FOLIO migration complete

June 19th, 2023

Cultural Challenges

- Structure of migration activity
- Decision making authority
- Overwhelm
- Answers not readily available

Structure of Migration Activity

Challenges

- Lack of strong, consistent project management
- Voluntary project groups

Approach

- Vendor Index Data brought with them project management support, tools, templates used in other FOLIO migrations
- Clarify who was responsible for functional gaps

Decision making process

Challenges

- Highly collaborative decision making culture

Approach

- Structured collaboration
- Vision and philosophy for data mapping

Overwhelm

Challenges

- Options, options, options
- Size of training needs felt daunting

Approach

- Iterative approach to workflows
- “Day One” training needs

Answers not always readily available

Challenges

- Not an out-of-the-box system
- No single source for training information

Approach

- Engaged with the FOLIO community

Lessons Learned



Stanford

- It will take time for FOLIO to evolve into what we envision.
 - It's a continuous undertaking.
 - Everything takes longer time than we anticipated.
- However, FOLIO migration was an enriching experience which made us stronger as a team.



CU Boulder

- Skillsets to cultivate in self & team
 - Iterative approach to processes, systems, and learning
 - Systems-thinking
 - Creative and solutions-oriented thinking
 - Project Management
 - Programming & technical skills

Thank You!





Resources

- [FOLIO.org](#)
- [FOLIO Community Wiki](#)
- [FOLIO Acquisitions Special Interest Group Page](#)
- [FOLIO Documentation](#)
- [CU Boulder FOLIO LibGuide](#)