Development Support for the TAMU Libraries Transition to FOLIO – A One Year Check-In

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Talk Outline

- Brief history of TAMU’s migration to FOLIO
- Data migration from the legacy Voyager ILS
- Reporting
- Spine-label printing
- The Catalog Service and its client services
- VuFind and OAI-PMH
- A time of transition for the organization
- Plans for further development
How we got here

Jurassic period through 2021 – Voyager Shop 20+ years

Late 2015 – Join Open Library Environment (OLE) & Kuali Foundation

2016 – Join Open Library Foundation

October 2018 – Collaborate with BP3 consulting to develop FOLIO’s workflow solution, mod-workflow and mod-camunda

February 2020 – Standardized on our migration methodology

October 2021 – Finalize production systems (We are self hosted)

January 2022 – Performed migration to Juniper

August 2022 – Upgrade in place from Juniper -> Kiwi -> Lotus

May 2023* – Upgrade in place from Lotus -> Morning Glory -> Nolana
Migration -

Here are some thoughts that come to our minds when thinking about our data migration:

• Grass Roots / Slow Burn / We had time
• Build Teams
• Got Involved
• Collaborate
• Build Expertise
• Rinse and Repeat
Migration - Technical Stuff

• Same process as others
  • Quickly discovered how special / different we were.
  • Harvest From Voyager via SQL / Datasets
  • Transform
  • Ingest into FOLIO
• Used a variety of process that evolved over two years and were carried forward through various FOLIO version.
• Grouped migrations by domain: Users, Vendors, Purchase Orders, Bibliographic Records, etc.
• Started off using FOLIO API’s, but had to resort to DB to DB for larger domains. Eventually was able to move some back as FOLIO API improved
• Archived / Migrated the Voyager ORACLE data to a Microsoft SQL Database.
Two big categories: **MIS Reports** and **annual reports**

Over two decades, a set of reporting services called the “MIS Reports” grew up around Voyager

- Bespoke scripts in MS Access, Perl and PHP serving different kinds of reports for specific business requirements
- In addition, extensive Perl scripting was written and enhanced over the years for annual institutional reporting, especially ARL and ACRL
To duplicate old experience, we wrote a custom PHP page to expose the new implementation of the reports.

Some multi-step processes were implemented in mod-camunda
Reporting: Annual Reports

- Instance records, Holdings records, and Item records...
- ACRL: All items
- ARL: All items sub-divided by library
- Physical Books, Physical Media, Digital Media, Physical Serials, Digital Serials, Maps, Government Docs, and more...
- Held, Added, Withdrawn
- Circulation
- Digital repository holdings, downloads
Spine Label Printing

• SpineOMatic – a desktop app from Ex Libris that works with ALMA
Spine Label Printing

• mod-spine-o-matic: A shim that runs atop our FOLIO and provides ALMA-like XML responses by barcode.
• SpineOMatic is happy enough to work with these responses!
External clients of our catalog API: MyLibrary

MyLibrary – a service for TAMU patrons to see their checked-out items, see pending requests, make renewals, check library hours, etc.
Get It For Me Button is a service for providing links to the Illiad request management system. These links are customized based on the individual item in the library catalog.
# GIFM Button in the wild

## Internet

View cover art

## Evans: Library Stacks

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Status</th>
<th>Get It</th>
</tr>
</thead>
<tbody>
<tr>
<td>PZ7.R79835 Hard 2007b</td>
<td>Available</td>
<td>Get It: 2 days</td>
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## Remote Storage

<table>
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The role of the Catalog Service

- Single API to provide easy access to some simple catalog tasks
  - Get item details
  - Get patron charges/checkouts
  - Get fines
  - Renew checkout
- When we transitioned from Voyager to FOLIO, MyLibrary and GIFM Button didn’t need to change – we just get Catalog Service to talk to FOLIO as well as it could talk to Voyager
OAI-PMH changes

For loading records into VuFind and EDS we use the `metadataPrefix=marc21_withholdings` but due to historical practices we also needed the 998 field along with the 952 to assist in building out the browse by location for VuFind.

- Added a 998 Field – Which historically for TAMU was part of the holdings record.
- Use the 952 Field – Which historically for TAMU was part of the item record.

- We have also change the OAI-PMH export so that if the 998 or 952 suppressed in FOLIO it does not export it as part of the OAI-PMH harvest.

  - 998 t – Field 0 or 1 ( 1 is suppressed )
  - 992 t – Field 0 or 1 ( 1 is suppressed )
 VuFind for catalog access

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Author(s)</th>
<th>Language</th>
<th>Location</th>
<th>Call Number</th>
<th>Year</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Harry Potter - the story of a global business phenomenon</td>
<td>J. Gourley, Susan</td>
<td>English</td>
<td>BLCC</td>
<td>HU4485 .G65 1999</td>
<td>1999</td>
<td>Available Online</td>
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<td>3</td>
<td>Harry Potter: sheet music from the complete film series</td>
<td>J. Rowling, J. K.</td>
<td>English</td>
<td>BLCC</td>
<td>M1157 .F7 2011</td>
<td>2011</td>
<td>Available Online</td>
</tr>
</tbody>
</table>
Transitions in the Organization

- MGT Consulting Group Report released October 2021
- Library no longer a “tenure home for faculty”
- Crippling exodus of expert personnel
- Coincided with the re-implementation of our reporting services
- Developers had to take on new roles
Future Work

- Workflow modules, mod-workflow and mod-camunda are making progress toward wider adoption
- TAMU now fielding a recognized FOLIO dev team
- MIS reports could transition to a new interface, and some may work better in a business intelligence tool (e.g. Superset or Power BI)
- Annual reports will settle into a better routine
- Libraries stakeholders will work to ensure the future of a development team that can support FOLIO and the rest of our critical applications