

# FOLIO Implementation

FIT Monthly Newsletter | Issue 2 | October 2018

## FCLC chairs meeting

All FC committee chairs & FIT

On Monday, September 10th FCLC met with the chairs of all the various Five College committees and task forces as part of the semi-annual Five College Chairs meeting. As with past meetings, each group talked about the activity and accomplishments over the previous year. However, the focus of this meeting was a bit different from past meetings.

The overriding theme looking forward was how the work of committees would be aligned with the FOLIO implementation, and how and when various FOLIO-based working groups will be formed. The FOLIO Implementation Team presented a proposed matrix of various working groups that will be needed at various points during FOLIO implementation and how some fit well with existing committees while other will need to pull membership from a diverse group of staff.

The discussion indicated an interest in keeping working groups small and nimble, while expecting those groups to issue occasional calls for consultation with large groups of people. Such an approach will, we hope, allow us to work quickly and efficiently, while still consulting with many voices when necessary.

## Module: users

User scenarios for circulation

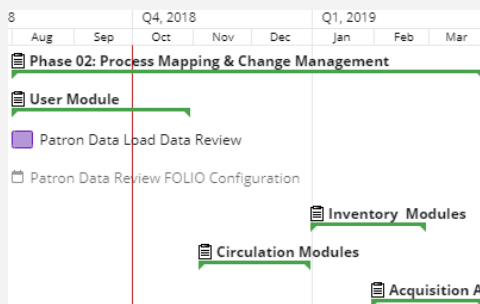
Work has begun on configuring and building the Users module in FOLIO. On September 19th, 28 members of the Five College library staff gathered at UMass to brainstorm user scenarios related to circulation functions. Over 130 scenarios were generated in the areas of loans, requests, fines & fees, communication, and user management. Thanks to everyone who participated. Next steps include clarifying and consolidating scenarios, prioritizing functions, and translating them into testable criteria. After sharing the list and receiving feedback, the resulting list will be used to guide the work of the Users, Inventory and Circulation module working groups.



Access meeting at UMass, September 2018

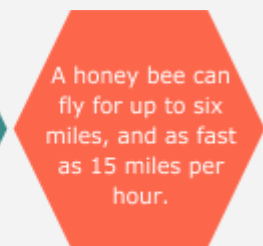
## Project timeline

Snapshot of Phase 2: Quarter 4, 2018



## Bee factual

Fun facts about bees every month



Learn more, get involved or contact FIT:

[www.fivecolleges.edu/libraries/folio](http://www.fivecolleges.edu/libraries/folio)



## Circulation workflows

Anya Arnold's September visit

Our FOLIO Implementation Consultant, Anya N. Arnold spent a week with us in September. She spent time with practitioners at each library learning about how their workflows are similar and unique within the broad topic of circulation. She learned how items were prepared for the shelf, processed for course reserve, checked in and out, and billed. She also learned about some item-level cataloging and about how equipment and other non-book items are tracked and managed within Aleph.

Over the next few weeks, Anya will be compiling her notes and creating workflow diagrams that will be shared with each person she shadowed, to ensure accuracy. Then once the diagrams are approved they will be shared with FIT to discuss where there is agreement and where there are variances. These workflows will then be mapped to a testable workflow within FOLIO. Every six to eight weeks Anya will be spending time in the Valley.

## FOLIO Forum

Highlights from the FOLIO community

[Inventory App Update](#) (YouTube)  
by the Metadata Management SIG

*Susan K. recommends this video for all staff to see how the inventory app works in FOLIO!*

## Did you know?

We're offering Slack training in October

**What:** [Slack](#) is a tool we are using to communicate and collaborate for the FOLIO project. Slack is a great way to share information with groups of people on particular topics. In this training, we will get you comfortable with the tool so you can participate in, and get regular updates about, the FOLIO Project. We will:

- Get you logged into the [FOLIO-Five Colleges Slack](#) workspace
- Tour the features and functions
- Show how to communicate, search, and share inside Slack.

**Who:** All staff of the Five College Libraries

**When:** October 11th at 2pm

**Where:** Join via [Zoom](#), Come in person to UMass, or attend remotely with a group of your peers at a Five College library near you.

- **UM:** Rm 1620 (Instructor: Kat Berry, Moral support: Steve Bischof)
- **HC:** Hill Ubina (Hosted by Abby)
- **MHC:** Rm 418 (Hosted by Erin)
- **AC:** Barker Room

**Questions:** Kat Berry ([kberry@umass.edu](mailto:kberry@umass.edu))

*This training will be recorded.*

## Principles in action: Communication

"Commitment to transparent communication throughout all stages of the project."

FIT has been working on a number of strategies to ensure transparent communication. One of them is this newsletter right here! Another is to think through how we form working groups, gather input, and make decisions. As described in the piece on the FCLC Chairs Meeting, we spent quite a bit of time discussing how best to form working groups and appropriately balance the goals of wide participation with effective and efficient group functioning. We're also discussing what we are calling an "hourglass" model for decision-making (with many thanks to Sara Colglazier/MHC for the inspiration!); we gather a large group of people together for discussion and input (see the User Scenarios segment in this newsletter), while a much smaller group has responsibility for digesting all the input and making necessary decisions, and then we float those decisions back out to the larger group for vetting, feedback, and acceptance testing. We heard good feedback on the User Scenarios meeting and we look forward to seeing how this strategy works for the Five Colleges. Let us know what you think!

**Slack:** for chatting and announcements. [Request a sign up link.](#)  
**Wrike:** project management software. [Request an account.](#)



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