RACL Executive Committee (RACL Exec)
Meeting Minutes
March 28, 2025

RACL Exec Attendees:

Joy Bolt (Chair)	Barry Robinson (for Toby Graham)
Laura Burtle (for Jeff Steely)	Leslie Sharp
Sonya Gaither	Shaundra Walker
Lucy Harrison	Brad Warren
Tamatha Lambert	Melissa Whitesell
Robert Quarles	

GALILEO/USG Staff:

Sean Boyle	John Stephens
Jeff Gallant	Jef Whatley
Seamus Narron	Josh Walker Weir
Russell Palmer	Mike White
Sean C Purcell	Joy Woodson

Agenda:
Chair Joy Bolt called the meeting to order. Lucy Harrison took roll. Shaundra Walker moved to approve the agenda, Melissa Whitesell seconded, and the agenda was approved. Shaundra Walker moved to approve the minutes from the January meeting, Melissa Whitesell seconded. Minutes were approved.

RACL Updates:
Leslie Sharp expressed that she is looking forward to hosting everyone at Georgia Tech at the end of April (for the RACL meeting) and please let her know if you have any questions. There will be an opportunity at the end of the day for a tour, including an excellent exhibit on John Portman that will be up until December.

Lucy reminded folks to register for RACL. The agenda will be drafted within the next couple of weeks, and she will send out a reminder to anyone who hasn't registered at that point. She also reminded the group that there will be a vote on new RACL Exec representatives at the full RACL meeting. Melissa Whitesell, as past chair, will start working on a slate of nominees to share.

Lucy reminded everyone that we will be moving off the statewide courier service at the end of this fiscal year. There was some discussion at last year's in-person RACL meeting about how to handle those funds, which are currently being collected as part of the GIL Resource Fee. Most likely those funds will be returned to the libraries, but we will take a formal vote on that at the April RACL meeting.

GIL Updates:
Sean Boyle reminded the group that institutional representatives and committee members are attending weekly meetings at this point, which is a lot. They're doing great, but if they need any support, Sean and Barry and the GIL team are here to help. All teams are currently working through the first round of User Acceptance Testing (UAT) and providing regular updates at Inst Leads and Imp Team. He provided updates on the work of the functional committees:

- **Acquisitions:** Attended HLM/FTF/EDS trainings; HLM org/agreement review
- **Analytics:** Collaborating with RACL LIV for Panorama session

- **Cataloging:** Evaluating bib/hldg/item loads; Boundwith evaluation/migration
- **Fulfillment:** Patron purge instructions; Working groups on Circulation Freeze plan, Courses, Requests/Staff Slips, Patron Notices, Training/Documentation
- **OPAC:** Locate Issues and Enhancements Priority Survey – created report, shared with GIL

Sean asked the group to approve the new Acq/ERM Vice-chair - Chandra Jackson (UGA). Tamatha Lambert moved to approve, Sonya Gaither seconded, and the motion passed.

There are still Committee Officer Vacancies in the following committees, so please send along the names of any interested staff:
- GKR – Vice-chair
- Special Collections – Vice-chair

FOLIO and OpenRS Project Update:
Sean Boyle then provided an update on the FOLIO project. Below is a list of deliverables that institutions should have completed by the middle of March. This list covers tasks from the start of the project.
- Complete data cleanup activities
- Create EBSCO Connect Accounts
- Create FOLIO accounts for "core staff" at library (local project team, dept heads, etc.)
- Review Circulation training
- Complete material type mapping spreadsheet
- Complete circulation policy template
- Create FOLIO accounts for all library staff
- Circ policy component configuration
- OCLC authorization account / Z39.50 config
- Data load review
- Verify local integrations
- Evaluate Lists App
- Create use cases/needs for FOLIO reporting
- Create organization categories and types
- Review loaded agreements
- Verify basic vendor info
- Alma reserves – course cleanup

Currently, institutional leads are working on the following deliverables:
- Item and patron creation for circ rule testing
- Establish Reply-To emails
- Verify Library integrations
- Acquisitions/ERM: Review HLM generated org/agreements templates
- Circulation: Review 2nd data load – Bibs/Hldgs/Items; Patron purge
- Cataloging: Review 2nd data load – Bibs/Hldgs/Items
- OPAC: Rank/organize Locate issues and enhancement requests; Locate login testing

Sean then reviewed the current high-level timeline and cutover dates, now until Go Live:
- Now - 4/4/2025 - UAT Ramsons
- 3/31 - 4/11/2025 - Sunflower Bugfest
- 4/15 - 5/28/2025 - Library faculty/staff training (EBSCO)

- 4/28/2025 - DRESS Rehearsal - GIL to send bibs/holdings/items at EOD
- 4/30/2025 - New Order Freeze
- 5/14/2025 - DRESS Rehearsal - GIL to send circulation data EOD
- 5/21/2025 - DRESS Rehearsal "Go-Live"
- 6/01/2025 - Freeze Cataloging - GIL to send bibs/holdings/items/authorities EOD
- Early June – EBSCO training on Sunflower release features
- 6/16/2025 - Fiscal year closed in Alma, Send orders data
- 6/18/2025 - Freeze Circulation, Send circulation data
- 6/25/2025 - GO LIVE *[Note: We are proposing a change to this date; see discussion below]*

The detailed project plan for all products can be found here - https://libguides.galileo.usg.edu/GIL-FOLIO/start_here

The timeline for the Ramsons upgrade is below:
- February 14 - 24 : GIL exported data, delivered to EBSCO
- February 24 - 25 : USG Ramsons FOLIO Environments in place
- February 26 – 27 : EBSCO completes data prep
- March 10 – 17 : Data processing and loading (EBSCO) done
- Beginning March 17 - reindexing for Locate/EDS is complete. OpenRS may take longer.
- OpenRS reindexing still in progress (please refrain from using/testing that environment)
- March 31 : Critical Service Patch #1 released
- Fix known issues : Automatic blocking not working

Since the Ramsons upgrade was delayed by a few weeks, that is having an impact on the overall timeline. We are currently looking at a mid- to late-July go live and will confirm a date with Imp Team soon.

We are currently performing the first round of FOLIO / OpenRS User Acceptance Testing (UAT) in the Ramsons environment from March 17 – April 4 (additional UAT will be conducted on Sunflower environments in June). We may provide additional time depending on configuration/availability of certain products (OpenRS, FOLIO CSP #1, etc.). As a reminder, the USG FOLIO Implementation Team performs the official UAT. The EBSCO trainer 'demonstrated' UAT for the Implementation Team and those recordings will be posted shortly. A copy of the UAT spreadsheet will be provided to committees and institutional leads as a training exercise along with the recording of the UAT demonstrations. Committees and institutions will provide feedback.

Additionally, we are reviewing the second data load, testing Locate logins, reviewing HLM organizations and agreements, testing Authority record loading/linking, beginning OpenRS / request testing, doing Locate evaluation and testing, and looking at the Lists App for evaluation and use case gathering. As we move into April we will finish up Ramsons testing and begin formal training from EBSCO for all USG library faculty/staff. GUGM will take place in May, and we are still looking at June for final training, data loads, and acceptance testing on Sunflower. Go live itself will likely be delayed until July.

For OpenRS specifically, we are currently reindexing the OpenRS environment (post-Ramsons upgrade) and testing hold/request functionality internally. We expect to soon give the all clear to OPAC and Fulfillment to test.

Panorama core data sources are complete, and we continue to work with institutions on their local data sources.

For Bibliograph, 24 dashboards have been reviewed and signed off as complete by libraries. We have a walkthrough/demo planned with Bibliograph team on Friday, April 4th.

Thanks to a suggestion from Jeff Steely, we will be forming a Communications Subcommittee. This group will develop, coordinate, and distribute planned messaging around migration. They will develop a comprehensive list of communication needs, plan communications for a variety of audiences, and assist in identifying key institutional contacts for specific migration communication needs (permalink changes, etc.) Currently we have a chair (Laura Carscaddon – GSU) and one additional volunteer (Betsy Fleming – Highlands) but could use several more volunteers. The Chair will attend the next Imp Team mtg (4/1).

Lucy reminded the group that we are planning a discussion on eReserve Plus with RACL in April, including options for piloting in FY26 and general rollout. Procurement will post as sole source after that discussion.

GUGM:
Sean and Joy Woodson provided the group with information on the upcoming GIL User Group Meeting, which will take place May 12-13, 2025, in Macon. There will be pre-conference sessions for EBSCO and USG FOLIO implementation team members. [Registration](#) is now open; deadline is May 2. Day 1 is $15 and Day 2 is $45. There will not be a formal call for proposals since most of the content will be FOLIO-specific. So far we have about 100 people registered, but are anticipating there will be at least 200 attendees eventually.

Moving forward, we would like to recognize retirees briefly at GUGM. We will ask RACL for the names of any retirees for FY24-25 prior to that meeting.

RACL Spring Meeting:
Lucy Harrison and Joy Bolt provided a reminder on the Spring RACL meeting, which will take place Friday, April 25 at Georgia Tech. Registration Fee will be $35. Potential topics include:
- Legislation
- Federal concerns
- Budget Update
- GIL Resource Fees
- Strategic Initiatives Work
- GIL/Alma Updates
- FOLIO + OpenRS
- Course Reserves/CMS – decision on pilots?
- Skilltype Presentation

No other agenda topics were added at this point.

Laura Burtle moved to adjourn the meeting, Sonya Gaither seconded and the meeting was adjourned.