FOLIO Product Council, Technical Council, and the SIGs

Keeping the Big Picture in Mind

Paula Sullenger, Assoc. Dean for Information Resources
Texas A&M University Libraries
psullenger@tamu.edu

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EBSCO Information Services

FOLIO Partners
OLE Community

- Academic Libraries and Consortia
- Committed to Open Source Solutions
- Collaborative partners providing support as projects become ready to be implemented.

Duke University
HBZ
University of Chicago
SOAS University of London
Texas A&M University
University of Colorado Boulder
Auburn University
Lehigh University
GBV/VZG
Leipzig University
Cornell University
University of Alabama
Collaboration & Communication

Zoom

https://wiki.folio.org/
https://discuss.folio.org/
https://folio-project.slack.com/
https://issues.folio.org/ - requires sign-in
https://www.youtube.com/ - Open Library Foundation channel for FOLIO Forum archives
Special Interest Group (SIG)

Roles and Opportunities
A Special Interest Group (SIG) consists of practitioners from libraries and services providers that are interested in contributing to a specific functional area of the FOLIO platform.

https://wiki.folio.org/

• Accessibility
• Consortia
• Metadata Management
• Reporting
• Resource Access
• Resource Management
• User Management
• System Operations and Management
Resource Management subgroups

• Acquisitions
  • Credits
  • Finance
  • Invoice
  • Orders
  • Receiving
  • Vendor

• Selection
  • Workflow app & ToDo app
  • eHoldings
  • ERM
  • Tags
Roles within a SIG

FUNCTIONAL EXPERTS

- Provide real-world expertise, answer specific questions, examine work processes and provide feedback, help shape direction of development

CONVENER

- Keeps the SIG functioning, set agendas, listen to concerns, coordinate effort across multiple areas; Report activities on FOLIO Project Report and report to the Product Council

PRODUCT OWNER

- Document needs of SIG, manage feature backlog in JIRA, quarterly release reviews, serve as bridge between developers and functional experts

UX DESIGNER

- Converts functional needs expressed by experts into a visual interface, using mock-ups and wireframes
Benefits of the SIG model

SIG involvement gives librarians the opportunity to

• Rethink everything we do, every step in the process
• Have input on each aspect – design, workflow, functionality

SIG involvement by librarians gives designers and coders

• Input from libraries of different sizes and purposes
• Insight into the shortcomings of existing library systems
• Insight into what future purposes FOLIO could serve
Product Council: SIG of SIGs

Governance

- Guide strategic development
- Review roadmap progress
- Assist with resourcing the project
- Liaison to SIGs
- Meet with SIG conveners once a month for reports
Membership

Representatives from key stakeholders in FOLIO

- EBSCO
- Index Data
- Official representative from each participating library

Work by consensus
Primary Functions

• Synthesize roadmap, establish priorities in the roadmap, assess strategic developments for impact on the roadmap;
• Identify functional gaps in the roadmap and act to ensure the gaps are filled
• Charter Special Interest Groups (SIGs)
• Coordinate the work of FOLIO community development partners
• *Coordinate and encourage community engagement in FOLIO*
• *Coordinate migration and implementation*
• Prioritize post-v1 development
Charge: To support the PC and to assist with creating the weekly PC agenda. The PC should refer SIG concerns to the Executive Committee if the concerns require more information, more analysis, and consultation with other groups.

Membership:

Chair of the Product Council
Chair-elect of the Product Council
Past Chair of the Product Council
EBSCO FOLIO Project Manager
EBSCO FOLIO Project Owner
Index Data representative
Technical Council chair
SIG Conveners & SIG Liaisons

SIG Conveners are ex-officio members of the Product Council

One PC meeting a month is dedicated to SIG concerns and reports

Most PC members are assigned as liaison to a SIG and often attend most meetings
Technical Council

The role of the Tech Council is to:

• Set general technical direction, carefully abiding by our ‘local decision making where possible’ guiding principle.
• Define processes, procedures and standards required for contributing code to the project
• Mediate technical conflicts between collaborators or foundation projects
• Proactively advise the Product Council on technical issues that will require effort and prioritization
• Respond to requests from the Product Council on technical issues
Recent Tech Council work:

- Conducted the Proof-of-Concept review for the Workflow app
- Reviewed and responded to the outside review of FOLIO
- [https://wiki.folio.org/display/TC/OTS+Project+Health+Report](https://wiki.folio.org/display/TC/OTS+Project+Health+Report)
- Reviewed the underlying Stripes architecture
Questions?

Paula Sullenger
psullenger@tamu.edu
## Epic Roadmap

<table>
<thead>
<tr>
<th>TYPE</th>
<th>KEY</th>
<th>SUMMARY</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>UXPROD-1146</td>
<td>Receiving and Checking-in Materials based on Purchase Orders and Purch</td>
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<tr>
<td></td>
<td>UXPROD-1150</td>
<td>Exporting and importing finance record details via CSV - Building the me</td>
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<tr>
<td></td>
<td>UXPROD-1147</td>
<td>CRUD for Teams and addition of teams assignment to objects in various FO</td>
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<tr>
<td></td>
<td>UXPROD-1140</td>
<td>CRUD Payment and Credit Vouchers Manually and automatically when invoic</td>
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<tr>
<td></td>
<td>UXPROD-1142</td>
<td>Managing Claims, Claim Responses, and Status Reports for Materials - Buil</td>
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<td></td>
<td>UXPROD-1148</td>
<td>Developing and providing access to basic support content for Vendors, Fin</td>
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<tr>
<td></td>
<td>UXPROD-1253</td>
<td>E-Resource usage data: Calculate and visualize statistics - This Epic is</td>
</tr>
<tr>
<td></td>
<td>UXPROD-1319</td>
<td>Reporting: Data Warehouse Reports - This EPIC is for the building and test</td>
</tr>
<tr>
<td></td>
<td>UXPROD-1321</td>
<td>Item states (status) - Item states comprises stories on about items' availa</td>
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</tbody>
</table>
### Receiving and Checking-in Materials based on Purchase Orders

<table>
<thead>
<tr>
<th>Issue</th>
<th>Description</th>
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<tbody>
<tr>
<td>MODORDERS-72</td>
<td>Define receiving endpoints in RAML</td>
</tr>
<tr>
<td>UXPROD-186</td>
<td>Checkin Item(s) and update details regarding availability</td>
</tr>
<tr>
<td>UXPROD-187</td>
<td>Receive Item and update details regarding availability</td>
</tr>
<tr>
<td>UXPROD-192</td>
<td>Receive Physical Item(s) and update inventory record(s)</td>
</tr>
<tr>
<td>UXPROD-893</td>
<td>Ability to update item record with Barcode</td>
</tr>
<tr>
<td>UXPROD-193</td>
<td>Checkin Electronic Item(s)</td>
</tr>
<tr>
<td>UXPROD-194</td>
<td>Checkin Maintenance (Adjust the pattern of expected items)</td>
</tr>
<tr>
<td>UXPROD-689</td>
<td>Ability to update item record with call number when receiving</td>
</tr>
<tr>
<td>UXPROD-690</td>
<td>Ability to update item record with location when receiving</td>
</tr>
<tr>
<td>UXPROD-891</td>
<td>Allow Item status to be set during receiving process</td>
</tr>
<tr>
<td>MODORDERS-135</td>
<td>Update Physical schema: Add expectedReceiptDate</td>
</tr>
</tbody>
</table>
Ability to update item record with Barcode

Assumptions:
- Development Team: Stacks
- Rank: Chalmers: can wait - up to a quarter after go-live
- Rank: Chicago: go-live
- Rank: Cornell: go-live
- Rank: 5Colleges: go-live
- Rank: Lehigh: go-live
- Rank: TAMU: go-live
- Rank: U of AL: go-live
- Rank: Bremen: go-live

Description

**Purpose:** When receiving a physical item the system will prompt you to input the Barcode and attach that to its corresponding item record in inventory.

**High-Level Requirements:**
- GET barcode data from inventory record
- display barcode field in receiving screen for each item record
- POST update to barcode data from value input in receiving screen
Texas A&M's unranked features

Order by Epic Link ▼
- UXPROD-1383
  Ability to roll back a load if problems
- UXPROD-1379
  CRUD for Action Profiles
- UXPROD-1382
  CRUD for Delimited Data Mapping Profiles
- UXPROD-1381
  CRUD for EDIFACT Data Mapping Profiles
- UXPROD-1376
  CRUD for File Extensions
- UXPROD-1377
  CRUD for Job Profiles
- UXPROD-1380
  CRUD for MARC Data Mapping Profiles
- UXPROD-1378
  CRUD for Match Profiles
- UXPROD-1406
  Data Import (Batch Importer for Bib Acq) - M...
- UXPROD-1384
  Data Import permissions

Details
- Type: New Feature
- Status: OPEN [View Workflow]
- Priority: P3
- Resolution: Unresolved
- Affects Version/s: None
- Fix Version/s: Q3 2019
- Labels: crossmapps, data-import, delimited_files, marcimport, post-v1
- Epic Link: Batch Importer (Bib/Acq)
- Analysis Estimate: Large < 10 days
- Front End Estimate: Medium < 5 days
- Back End Estimate: XXL < 30 days
- Confidence factor: Low
- Estimation Notes and Assumptions:
  I think this is two distinct requirements, a test load and a rollback of a real load being very different things.

  It's not clear if any analysis work has been done already, but a sound estimate would definitely need such an analysis, including thorough considerations about possible technical solutions.

  Given the time constraint, the immediate estimates here are not based on any such serious analysis of the two requirements, so confidence is low.

Development Team: Folijet
- Rank: Chicago: can wait - up to 1 year
- Rank: 5 Colleges: can wait until Fiscal year rollover
- Rank: Lehigh: can wait - up to 1 year
- Rank: Bremen: go-live
ERM only implementations:
- Chalmers
- Bremen

Early implementers begin intense testing:
- Clovis July 2019
- Daisy Oct 2019
- Edelweiss Jan 2020
- Fameflower April 2020
- Goldenrod July 2020
- Honeysuckle Oct 2020

Libraries in Production:
- Acq & ERM, some Cat
- July 2019
- Oct 2019
- Jan 2020
- April 2020
- July 2020
- Oct 2020