folio

future of libraries is open

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

FOLIO Days
Bremen, Germany
April 11, 2019

folio

FOLIO Partners

Universidad Nacional Autónoma de México
UNAM

EBSCO
Information Services

CHALMERS
UNIVERSITY OF TECHNOLOGY

FIVE COLLEGE CONSORTIUM

INDEXI NDEXIN DEXIND EXINDE X DATA

OLE
OPEN LIBRARY ENVIRONMENT

folio

OPEN LIBRARY ENVIRONMENT

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

folio

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

folio

Special Interest Groups (SIGs)

- Accessibility

- Consortia

- Metadata Management

- Reporting

- Resource Access

- Resource Management

- User Management

- System Operations and Management

https://wiki.folio.org/

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.

folio

Resource Management subgroups

- Acquisitions
  - Credits
  - Finance
  - Invoice
  - Orders
  - Receiving
  - Vendor

- Selection
- Workflow app & ToDo app
- eHoldings
- ERM
- Tags

Roles within a SIG

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

FUNCTIONAL EXPERTS

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

CONVENER

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

PRODUCT OWNER

Converts functional needs expressed by experts into a visual interface, using mock-ups and wireframes

UX DESIGNER

folio

Benefits of the SIG model

SIG involvement gives librarians the opportunity to

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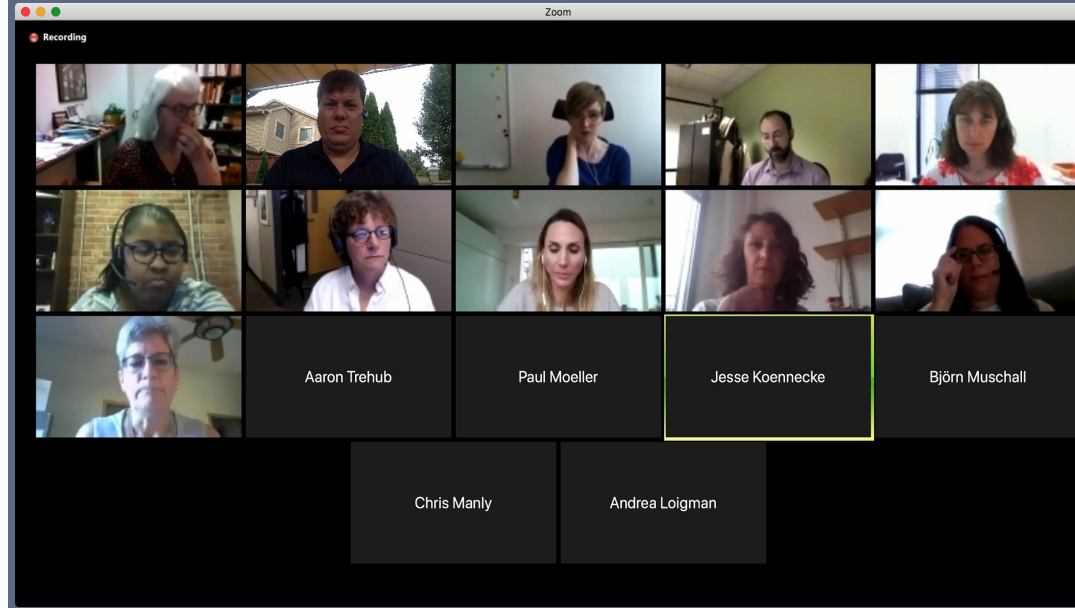- Have input on each aspect – design, workflow, functionality

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

folio

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

folio

Membership

Representatives from key stakeholders in FOLIO
- EBSCO
- Index Data
- Official representative from each participating library

Work by consensus

folio

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

folio

PC Executive Committee

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

folio

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

folio

Technical Council

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
- Reviewed the underlying Stripes architecture

folio

Questions?

Paula Sullenger
psullenger@tamu.edu

UX Product / **UXPROD-1146**

Receiving and Checking-in Materials based on Purchase Orders

Edit | Comment | Agile Board | More ▾

Issues in Epic

✔	MODORDERS-72	Define receiving endpoints in RAML
	UXPROD-186	Checkin Item(s) and update details regarding availability
	UXPROD-187	Receive Item and update details regarding availability
	UXPROD-192	Receive Physical Item(s) and update inventory record(s)
	UXPROD-693	Ability to update item record with Barcode
	UXPROD-193	Checkin Electronic Item(s)
	UXPROD-194	Checkin Maintenance (Adjust the pattern of expected items)
	UXPROD-689	Ability to update item record with call number when receiving
	UXPROD-690	Ability to update item record with location when receiving
	UXPROD-691	Allow Item status to be set during receiving process
✔	MODORDERS-135	Update Physical schema: Add expectedReceiptDate

folio

Ability to update item record with Barcode

Edit   **Comment**   **Agile Board**   **More ▾**

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 imput 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

folio

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-1405
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:	crossrmapps 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: 5Colleges:	can wait until Fiscal year rollover
Rank: Lehigh:	can wait - up to 1 year
Rank: Bremen:	go-live

folio

FOLIO 2019-2020

Clovis July 2019
Acq & ERM, some Cat

Daisy Oct 2019
Same, + Circ refinements

Edelweiss Jan 2020

Fameflower April 2020

Goldenrod July 2020

Honeysuckle Oct 2020

ERM only implementations: Chalmers Bremen

Early implementers begin intense testing

Libraries in Production

folio