# 2020-06-05 Resource Management Meeting Notes

## Date
05 Jun 2020

## Attendees
- Kristin Martin
- Paul Trumble
- Julie Brannon
- Tracy L Patton
- Marcia Borensztajn
- Nancy Pelis
- Tracy L Patton
- Eric Hartnett
- Dwayne Swigert
- Abigail Wickes
- Mark Arnold
- Lloyd Chittenden
- Martina Tumulla
- Tim Whisenant
- Martina Schildt
- Nicole Trujillo
- Sarah Dennis
- Dennis Bridges
- Sara Colglazier
- Abigail Wickes
- Kathleen Berry
- Ann Crowley

## Discussion items

<table>
<thead>
<tr>
<th>Item</th>
<th>Who</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Minute taker</td>
<td>Julie Brannon</td>
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<tr>
<td>Announcements/Updates</td>
<td>Kristin Martin</td>
<td>Product Council Highlights</td>
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<td>Product Council, June 4, 2020</td>
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<td>• voting for chair is underway</td>
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<td>• Missouri State is going live on FOLIO on Monday on Fameflower. Tracy Patton and Mark Arnold shared the scope of their implementation</td>
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<td>◦ Financial structure is very simple setup and might do more later. Put it together very last minute.</td>
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<td>◦ Not doing anything in the finance part - not creating any new orders until July 1st or after because of FYRO concerns. Will finish out the year in Sierra.</td>
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<td>◦ ERM is up and running in FOLIO and has been for almost a month. Putting things in as they come due.</td>
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<td>◦ Organizations file - have deduplicated record and most of their records are in FOLIO now</td>
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<td>• Kristin followed up with RA SIG members about the material type discussion. Kristin Proposes moving this to the app interaction group, so Martina Schildt will add that to an agenda.</td>
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<td>◦ Owen raised the fact that material type concept is also used in internal kb of Agreements. Material Types for acquisitions and Material Types for inventory serve different purposes and use different values. It would be helpful to create a definition for each.</td>
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Documentation needs for Resource Management

Marcia Boren sztajn

Marcia’s last name is pronounced roughly as Bo-ren-shtine

- Creating an initial information plan for documentation
- Long term goal is to create a knowledgebase that is useful for current and future community members
- Google Season of Docs update - FOLIO has been accepted and the program will enable interested writers to join the effort. Marcia is beginning to screen with us. See FOLIO news items for a nice write up about this: https://www.folio.org/about/news-events/article/folio-applies-for-googles-season-of-docs-and-seeks-technical-writers/
- email Marcia at marcia1.folio@gmail.com or ping on Slack

Discussion

- Kristin mentioned finding the lists of attributes very helpful example: Acquisitions Finance Module
- Scenarios of options for how to use the system so institutions can decide what might work best for them.
- Sara C mentioned that the interapp interactions are complex and hard to keep track of - if I make this decision here how will it impact other behaviors
- Lloyd mentioned that current system (not FOLIO) will explain how to do something, but never explain what a vendor record is for, why do you need this, how does it fit into the process. Would like to see more background/eco system context documentation. Doesn’t explain why you’d want to choose one fiscal close process over another.
- Background of what this is all about, what the options are, and if you follow a certain pathway it will have these implications in other apps
- Virginia M: We will make decisions locally and we should explain why we made certain choices to help other institutions. Ex: If you decide to put your e-resources in inventory these are the implications.
- Marsha suggests development context - it would be helpful to have a help bubble or alert that is embedded in the system as it is being used.
- Owen in Chat: The other issue that is on my mind (as a product owner) is linking documentation to the version of the app in use
- Julie: Very much support embedding documentation within the system interactively

From scolglaz@mtholyoke.edu to Everyone: 09:05 AM
+1 to Julie

- Lloyd agrees that context-sensitive support is very important
- Marsha - it will be interesting to see how much of that we need - she’ll need to know what areas of the system need that contextual info to find the right balance
- Kristin - what is the timeframe for how you’re imagining your work
  - Need about a month or so to plan initially and can then come back to the SIGs to look at the infrastructure, then document first app (background, to-dos, app interactions, meet with Product Owners, define level of specificity, etc).
- Kristin - what is the length of your contract
  - Until the end of the year at least and only half-time
  - Lloyd - current system employs 6 people for documentation and their documentation is horrible. Seems like this is more than one half-time position could handle. Would you be more of a coordinator
  - Marcia - yes, there is much to do. Her role is to establish a foundation

From Owen Stephens to Everyone: 09:12 AM

As a PO I’m keen to improve documentation available - the challenges are time & how we structure
- Without an approach for embedding a document into the code/UI it gets captured in various places. Having a structure - knowing where to put content - will be helpful.
- Dennis (PO) - Have you identified parts of the process where there is overlap. TestRail contains a good deal of “how-to”. Are you seeing parts of the process that we could tie into improving documentation
  - Marcia - there are definitely pieces in slack, Tips and Tricks, Test Rail, wiki, etc. Its about pulling those who know where those sources are together.
  - Dennis - some of this might be a recommendation about how we can make better use of our time documenting what we do document
  - Marcia - we need a style guide to standardize as we pull together content from all those various places so they have a common style and voice - they’ll need to be “translated”
Dennis Bridges

- Templates created in order settings to be used by any user when messaging a vendor
- A separate feature deals with the bulk version - many orders at a time

**Proposed workflow:**
- Create the message template in Settings (similar to patron notices functionality)
- Tokens are available to embed purchase order number, title, for example
  - Within the order, in Actions menu the user could choose “Message Vendor”
    - Popup modal requires user to specify which email address to send to since Organization
      can have several email addresses and the associated category (shipping/sales/billing
      etc.) OR be able to directly type the email address.
      - Virginia - would the email address for particular contact people associated with an
        organization be accessible? Dennis - yes, and we might want to show the person's
        name in addition to the category since that might help users find what they're looking
        for
      - Dennis - could we have more than 100 email addresses for a vendor - no, don't think
        so
    - Choose message template using search and filter - the number of templates could
      approach over 100 due to multiple libraries etc. Current thinking is to avoid having a type
      since that would require another click on the search and filter screen.
    - Token Selection - displays list of fields to customize your message (this is the same
      modal that users will see when creating templates)
  - Order message template tokens
  - Sara C - Can I copy the message to me or to cc other staff into the message?
    - Dennis: That's something to consider
  - Kristin: When the vendor receives the email, who appears in the "from" field?
    - Dennis: This would be an email address of your choice - you could repopulate it in
      the template or you add it each time
    - The email will then be in the sent folder.
    - Sara likes having it sent directly to her since its not as burdensome for her to find it
      in her inbox rather than a group email sent box
    - From ERM perspective for troubleshooting using the token to describe or associate
      troubleshooting with a particular resource in question
  - User will have the option to send the message and or save a PDF version of the
    message they crafted for use elsewhere (and could then fax or send by hardcopy, for
    example).
  - Message log on Purchase order will show history of messages sent (subject, date, sent to
    address, status of success/failure)
  - Note functionality on order could be used to capture
    - Sara - send email to a vendor and vendor replies back to her. Could she come into
      FOLIO and send a new message? Dennis: If you use the same subject line then it might
      be included in the email thread. Or you could use the notes to paste their
      response. Downside is that you end up with info in two places - in the message log and
      over in notes.
    - Kristin: I sent an email and I see some notes, let me see what's going on. Dennis - The
      subject and time stamp should help.
    - Sara - can I click on the log and see the original message? Dennis - I think it would be
      worth doing that. We've talked about a resend functionality which will require us to store
      the message contents anyway, so if we're going to store them we might as well allow you
      to click on it and see what the original message was. And Dennis can see use cases for
      wanting to see the original message contents. We just haven't gotten that far yet, but it
      makes sense to do that.

Dennis: Everyone please take a moment, if you're interested, to look at Order message template tokens
and provide input