Special Interest Groups

Existing SIGs

A category is used to group together a list of spaces. You can display a category's spaces by selecting a category from below:

View Spaces with Category: Sig Knowledge-bases Teams Other-groups Regional-sig

- **Accessibility**
  Collaborating with the ARL Joint Task Force on Services to Patrons with Print Disabilities,...

- **Acquisitions SIG**

- **App Interaction SIG**

- **Consortia SIG**
  The Consortia SIG works on use cases and review feature implementations for interinstitutional relationships that FOLIO ...

- **Data Migration**

- **ERM SIG**

- **Forum Facilitators**
  The Forum facilitators plan and carry out the biweekly forums/webinars on FOLIO and related projects/efforts.

- **Implementers SIG**

- **Internationalization SIG**
  Review user interface design, data storage, and OKAPI platform design for issues related to internationalization of the ...

- **Linked Data**

- **Metadata Management**
  The Metadata Management SIG works with developers to define essential bibliographic management functions: creating, edit…

- **Open Access SIG**

- **Privacy SIG**
  The Privacy SIG reviews user interface design, data storage, Okapi platform design, and intermodule communication for co…

- **Public Library SIG**

- **Reporting SIG**
  The Reporting SIG group will examine the needs of reporting in each functional area and the reporting needs of instituti…

- **Resource Access**
  The Resource Access SIG works with developers to define essential circulation functions: checking out and discharging li…

- **Resource Management**
  The Resource Management SIG works with developers to define essential functions for acquiring and managing all types of …

- **Support SIG**

- **System Operations and Management SIG**

- **User Management**
  The User Management SIG, formerly LSP Authentication/Authorizations SIG, works with developers to guide the integration …

- **Verse SIG**

- **User Onboarding SIG**

- **User Support SIG**

- **Verb SIG**

- **Virtual Library SIG**

- **Voice of the Customer SIG**

- **Work Plan SIG**
FOLIO Special Interest Groups (SIG)

Charge

FOLIO Special Interest Groups are the project’s community of subject matter experts (SMEs). SIGs serve as FOLIO’s collective authority on topics included in the scoped area of focus (e.g. metadata, sysops, resource access) with expectations for achieving certain outcomes through dedicated engagement. Guided by priorities set out in the FOLIO Vision, Strategic Objectives & Initiatives and FOLIO Roadmap, SIGs form consensus on FOLIO functionality through the creation of use cases, documents, reactions to prototypes, and code snippets. They also document existing functionality and contribute to user acceptance testing and bug identification to ensure functionality performs as specified. SIGs serve as a forum for product owners, subject matter experts, developers, and end-users to exchange ideas, develop shared goals for the FOLIO project, and research and develop new interchange standards with widely used software.

The work of a SIG is multi-focused on functionality, user-experience, and documentation. The scope of a SIG’s work includes:

- Providing a regular forum for discussion, in-depth exploration, and task or project recommendation, refinement, or prioritization for a functional domain area, including modules, apps, and related app dependencies.
- Assisting Product Owners with defining functional requirements and providing user stories to inform development.
- Providing regular consultation and collaboration with project leads, functional and technical owners, and other SIGs.
- Identifying, creating, and updating lists of workflow tasks to drive content for FOLIO documentation as well as individual apps info tips, and tricks content to benefit the project and community of end-users.
- Participating in user acceptance testing, quality assurance, regression testing, and troubleshooting issues encountered by implementers.
- Actively participating in FOLIO governance structures, project outreach and engagement including community on-boarding, progress reporting, assessment, and initiatives as requested.

There are many roles critical for the productivity of a SIG. These include:

- **SIG participants** are subject matter experts who make up the dedicated bulk of the group. SIG meetings are generally open to anyone regardless of their involvement in the project, though all participants are expected to abide by the FOLIO Code of Conduct. The more active the participants, the more work in a particular domain can be accomplished. Participants are highly encouraged to:
  - Set up a Confluence account and a Slack account, as detailed in FOLIO Communication Spaces.
  - Regularly attend and participate in SIG meetings, activities and discussions.
  - Complete necessary homework, supplying use cases, or performing other preparation outside of meetings as needed.
  - Participate in user acceptance, bugfest testing, regression testing, documentation writing, and other activities as needed.
  - Serve as an institutional representative SME by providing input on the ranking of features, supplying feedback on development, and reporting bugs.
  - Leading or serving on ad hoc subgroups or taking on time-limited roles, as needs arise.
- **SIG convener** is a person(s) selected by the group participants to facilitate, and to some extent moderate, the group’s discussions and activities. SIGs can have a single convener or up to three co-conveners. Conveners have the following responsibilities, which can also be delegated to others as appropriate:
  - Coordinate meeting agendas and ensure that minutes are posted to the SIG’s wiki space.
  - Help guide discussion at meetings and determine at what point rough consensus has been reached and therefore the discussion should move on to another topic.
  - Communicate SIG activities to the Product Council to promote inter-SIG communication and coordination.
  - Onboard new participants as needed.
- **Product Owner(s)** is the person or people who work with the SIG subject matter experts to understand requirements in the SIG’s particular area, translate them into user stories for FOLIO development for their product team, and manages the feature backlog, following the FOLIO Product Owner guidelines as detailed on the Product Owners page. A SIG may work with one or more Product Owner and a Product Owner may work with one or more SIGs. SIGs that lack a specific functional area (e.g., Implementation or App Interaction/Cross App) may not regularly work with a Product Owner.
- **SIG liaison/rep**: someone who volunteers or is designated by the convener(s) to represent the SIG in a separate group and responsible for communicating, advocating, and coordinating specific activities or areas of work as assigned to achieve good utilization of resources (e.g. Documentation Working Group).
- **Note taker** is the person responsible for taking rough, but organized meeting minutes that capture significant updates, agenda discussion, decisions, and links to related documents, action items or follow-ups. Meeting notes provide an important record of decisions made and actions taken by the SIG. Decisions made by the SIG should be documented in such a way that they can be found and referred to. This can be a dedicated role or done by rotation.
- **Product Council Liaison** is the person, generally a Product Council member, who serves as the contact person for the SIG for questions and issues. The PC Liaison should do the following:
  - Ensure there is information transfer from PC to SIG to make sure the group is up-to-date.
  - Help make connections between SIG or development as needed.
  - Help SIG understand how development falls in line with Roadmap and larger product development.
  - Provide periodic “health checks” with SIG, check on status, developer resources, etc.
  - Review monthly SIG reports for issues.
  - Be part of relevant Slack channels, attends SIG meetings or follows minutes and recordings.
Although SIG meetings are generally organized by a SIG convener(s) in regular consultation with product owners and on rare occasions developers in the particular area of expertise, all participants of the SIG are encouraged to be active contributors. Decisions are made by lazy consensus (see Product Council charge for a fuller definition), and will be recorded within meeting notes. Meetings are generally recorded as well, and SIG participants can review materials in case of missed meetings. While time contributions may vary depending on the activities of the SIG, active participants can anticipate a contribution of around 2 hours a week on SIG-related work.

SIG Working Groups

In lieu of a regular ongoing SIG, or as a time-bound separate group examining a specific topical area, SIGs may form working groups. Working groups can be formed from the desires of the subject matter experts on the SIG or at the behest of a Product Owner working in a particular functional area. Working groups lacking Product Owner involvement or development connection may serve as a discussion groups to take up a subject of interest and provide general recommendations for future development on that topic. Working groups led by Product Owners may serve many of the same functions as a SIG, but may cover a more narrow functional area and lack a separate convener. Working groups are typically time-bound as opposed to indefinite. Working groups may choose to develop into SIGs, depending on the needs of the software and length of time of development.

SIG Creation and Review

Priority SIGs will be generated from goals and deliverables outlined in the FOLIO Roadmap. A SIG is created by way of a proposal to the Product Council with a specific charge for the SIG. The proposal should contain the name of the SIG, a paragraph describing the purpose of the SIG, contact information for the convener, connections with Product Owners as appropriate, the names of other interested participants for the group, and (when appropriate) expectations for outcomes from the SIG. New SIG proposals are reviewed by the Product Council to ensure any overlap with other SIGs is intentional and that related SIGs know about each other’s work. SIGs may revise their charge at any time, and SIGs automatically renew each year when there is substantial activity in the preceding 12 months. SIGs that do not meet this requirement may be retired and archived by decision of the Product Council.

⚠️ SIG Setup Checklist

Check the SIG Setup Checklist for setting up communications resources for your team.