Kickoff Meeting, 2023-08-11

Attendees:

- Rob Roose - Spokane Public
- Jeremy Huff - Texas A&M, Workflow PM
- Autumn Faulkner - Michigan State
- Christine Tobias - Michigan State
- Jenn Colt - Cornell
- Jeremy Nelson - Stanford
- Martina Schildt - VZG
- Amanda Ros - Texas A&M
- Robert Heaton - EBSCO
- Joanna Cerro - Cornell
- Scott Peterson - Mobius
- Ian Walls - ByWater, Workflow SIG convener

Agenda:

- define workflows

“powerful automation of a chain of tasks”

differentiating between internal business processes of our institutions from what the SIG is building towards.

“Super macros”

Enabled users to do tasks without having them hardwired/developed into the FOLIO code. "user defined", "local", "customized"

automated series of tasks v. user-defined series of manual tasks.

Bringing together people, records and tasks

Workflow: “a persistent, user-defined series of automated tasks and manual steps that satisfy a local business process, across FOLIO modules and Apps, in an efficient and powerful way that is executable by a Workflow Engine”

Workflow App: “A user interface that allows for creation, maintenance and completion of Workflows within FOLIO”

Workflow Engine: “the underlying software that executes Workflows”

- gather up requirements/use cases for WolfCon meeting

Requirements

- ability to have humans manually complete workflow steps
- ability to start workflows based on:
  - human action
  - schedule
  - internal FOLIO event
  - external event
- Error reporting and debugging support for workflow development
- ability to share workflows between institutions (standard import/export format)
  - Metadata about workflow objects, include description and step-by-step notes
- Credentials/permissions for individual workflow steps
  - big topic!
- “script” step/node to allow for locally developed code to be added when needed

Use Cases

- report creation
- integration with external systems
  - OCLC integration
  - HathiTrust integration
- instance creation from purchase orders
- patron creation, synced from institutional identity provider
- data migration
- bulk edits on records not fully integrated with Bulk Edit App
- Book withdrawal procedure
• define meeting frequency

at least monthly at this point
more frequent meetings to get things kicked off. easier to cancel.
biweekly. Not Mondays. Could alternate by week. Will coordinate in Slack

Spokane has some resources for a Developer for a 2 year appointment that could be directed towards this effort.