

2019-09-06 Resource Management Meeting Notes

MEETING STARTS at 9 AM!!!!!!

Date

05 Sep 2019

Attendees

- Kristin Martin
- Anne L. Highsmith
- Peter McCracken
- Michael Arthur
- Owen Stephens
- Caroline Schmunck
- Eric Hartnett
- Paul Trumble
- Harry Kaplanian
- Tim Whisenant
- Kristen Wilson
- Ann Crowley
- Jack Mulvaney
- Julie Brannon
- Abigail Wickes
- Jackie Gottlieb
- Nicole Trujillo
- Sara Colglazier
- Andrea Meindl
- Kirstin Kemner-Heek
- Scott Perry
- Jeremy Huff
- Ann-Marie Breaux
- @Janet Ewing
- Nancy Pelis

Discussion items

Item	Who	Notes
Minute taker?	Peter McCracken	
Reverse RFP Draft to date Call for volunteers to help expand and flesh out work already done	Harry Kaplanian	<p>Harry presented his ideas around a "Reverse RFP" - an attempt at clearly define what FOLIO <i>does</i>, rather than looking at what it <i>doesn't do</i>, which is what much of the development process is (understandably) looking at.</p> <p>Libraries generally post RFPs when they want to seek a new system, so since no one has posted an RFP for FOLIO yet, it seemed appropriate to take a different approach to this. The RFP will say "This is what FOLIO can do today; this is what FOLIO will be able to do by the end of the year."</p> <p>Harry asked for feedback from participants, and invited individuals to edit parts of document, as needed.</p> <p>Owen Stephens raised a question about the version being described in the document. Kristin Martin said that, ultimately, it's destined to describe the MVP.</p> <p>Feedback should be submitted within the next two weeks.</p>
PC Updates <ul style="list-style-type: none"> • Develop FOLIO Code of Conduct - looking for volunteers to draft • Leipzig funded Tech Writer: will be posting • Technical Debt review 	Kristin Martin	<p>Kristin raised information about an updated Code of Conduct. Peter Murray wants to create a small group to create the Code of Conduct as it currently stands - will need some additional work to make it match FOLIO better. Kristin welcomes names of anyone interested in participating. Should be just a few weeks of work, then it'll be presented to the community. Either contact Peter Murray directly, or contact Kristin Martin to get an introduction. Responses needed right away - like, by the end of the day.</p> <p>Recruiting for Tech Writer is about to begin.</p> <p>Technical Council is addressing technical debt review.</p> <p>Chalmers will offer demo next week, at both ERM Subgroup and RM SIG group. showing the work they've done so far.</p>

<p>Texas A&M Demonstration: migration and display of vendor data into FOLIO (bonus: see some POs as well!)</p>	<p>Anne L. Highsmith Jeremy Huff</p>	<p>Anne displayed how TAMU is implementing Organizations app. They use a variety of IDs and symbols in their codes. Data has been exported from Voyager to FOLIO. Mapping from Voyager for addresses was the hardest, because FOLIO contact information is a series of addresses, phone numbers, URLs, etc., but Voyager has a single address, etc. She had to figure out how to break up the pieces when going out of Vgr, and then how to bring them back together in FOLIO. Especially tricky trying to connect specific addresses with specific phones.</p> <p>She still needs to keep POs connected with appropriate vendors when POs are imported.</p> <p>Account information migrated very well. Existing account notes were also migrated. When importing to FOLIO, Country Code should be entered as ISO 3-character code, and then the system will modify for display. So she had to convert spelled-out country names in Voyager to ISO codes, and then they'd be converted back after importation into FOLIO. Also, contacts records must be created first, then org records are created last, with references to the existing contact records.</p> <p>Jeremy Rupp described their migration tools, built using Camunda as a biz process workflow engine. They used three different OKAPI modules: mod-data-extractor - creates a stream of data from a persisted query; mod-workflow - provides an abstraction of the workflow concept; and mod-camunda - a service wrapper around the Camunda WorkflowEngine. Javascript was used to write each processor task - with a different processor task for most data types - Contacts, Addresses, Phone Numbers, Emails, etc - each task is separate.</p> <p>TAMU migrated about 7700 vendors from two libraries; they didn't expect to migrate any types of businesses other than vendors. About 1600 contacts were created; after working on several points where they could increase efficiency, the process took 2 minutes to run. They have ideas of several improvements to incorporate and implement. They're making links between historic Vgr identifiers and new FOLIO identifiers.</p> <p>Jeremy responded to Harry's question about why using Camunda approach rather than a simpler scripting process. He said that they've identified two different areas where other institutions might differ from what TAMU was doing; this process isolates those points, which simplifies how other libraries will be able to use this tool. Anne mentioned that this tool could also be used on a regular basis for updated imports, if needed – though likely in other areas, such as a specific extract and upload tool.</p>
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Action items

