Fund Code Configuration

Information in italics is intended to provide guidance while writing documentation and in general should be removed when a doc is at a v. 1 stage. The italics are suggestions to help guide what might go in a particular section. If you feel a section does not apply to the app or feature, please keep the section but just add that it does not apply. If you feel it makes more sense for your documentation, you can move sections up and down.

Purpose

Describe the intended use of the app or part of FOLIO. This may be short or long, depending. You could describe things like common workflows that take place in the app; configuration options; whether an app has specific integrations with outside vendors.

Permissions

Describe permissions that apply to the app or section you are outlining. Include default permissions and permission sets; dependencies that exist with permissions in other apps/parts of FOLIO.

Describe action-based permissions (if any) that apply to the app or section you are outlining, including permission dependencies and associated functional workflows.

Describe what each permission does, in language accessible to non-IT library staff.

UX/UI

Describe out of the box fields, including designed purpose, data requirements and validation, dependencies between fields.

Describe out of the box accordion menus, including purpose of the menus, customization options, and associated permission controls (if any)

Describe any workflows available through navigation menus, including purpose of the workflow, customization options, and associated permission controls.

Searching

Describe pathways for searching in the app/feature through the UI.

Describe fields that are indexed in the back end specifically for searching

Describe any advanced searching features and how they would work.

Functional workflows

Describe available tasks that can be conducted in the app. To document those tasks, create a new page and link it to this page.

Describe action-based permissions that are connected to these functional workflows, if any.

Reporting

Describe available in-app reports, including parameters for the reports, and associated permissions.

If there are developed LDP reports/queries for this app / area of FOLIO, describe those reports as well.

List any fields that may not be available in the LDP (e.g., for privacy reasons.)

Integrations

Describe any APIs that interact with the app. Provide links to the API / module information in Github.

Describe integrations that individual libraries may wish to develop for this app / area of FOLIO, if relevant.

If existing integrations have been developed by adopting libraries, provide links to the integration in Github or wherever the information can be found.

Describe and include any permanent links such as a link structure to records, searches, etc

Considerations for Implementation

Set encumbrance and allocation % values to "null" (Goldenrod has a display bug where it outputs as 0%) in order to deficit spend (or otherwise approve invoices prior to official university budget numbers).