2021-07-29 Meeting notes

Date
28 Jul 2021

Attendees
- Jesse Koennecke
- Sharon Wiles-Young
- Kristin Martin
- Anya Arnold
- Brooks Travis
- Angela Zoss
- Martina Tumulla
- Philip E Schreur
- Paul Moeller
- Nassib Nassar
- Tiewei Liu
- Maura Byrne
- Harry Kaplanian
- Ian Walls
- John Ballestro
- Gang Zhou
- Christopher Spalding
- Axel Dörrer
- Kirstin Kemner-Heek
- Mike Gorrell
- Gar Sydnor
- Björn Muschall
- Paula Sullenger
- Jana Freytag
- Thomas C. Wilson
- Martina Schildt
- Maike Osters
- Mike Gorrell
- Gar Sydnor
- Björn Muschall
- Paula Sullenger
- Jana Freytag
- Thomas C. Wilson
- Martina Schildt
- Maike Osters

Goals
- Determine August meeting schedule
- Review situation regarding the LDP App - determine next steps
- Discuss process for including other apps in the FOLIO reference environment

Announcements
- Articles are welcome for the Journal of International Librarianship: call for proposals
- JIO is getting permission to open their library with FOLIO and EDS

Discussion items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Notes</th>
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<tbody>
<tr>
<td>5 min</td>
<td>August PC Meetings</td>
<td>Jesse</td>
<td>Both Jesse and Kristin are out of the office on August 12. Is preference to have no August 12 meeting?</td>
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<td>No objections to canceling August 12. All other August meetings are on. SIG convener meeting will be on August 19.</td>
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<td>How will the functions of Exec PC (e.g., agenda-setting) be accomplished with the new Product Council? Observation: the other two councils have not chosen to have an executive group. Letting the SIGs know about the function of the executive group for bringing topics to the Product Council. There is some work to do on organizing ourselves. The TC is, for example, using some of its meeting time to create a list of future agenda items.</td>
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<td>To do: the PC needs to work through its charter to decide how to prioritize its work and new items come to PC. This is especially timely because the scope of the Product Council has been reduced. Can we set the agenda using the Slack channel of the 11 elected members? As we try to move to asynchronous decision-making, it is useful to use the same technique to set meeting agendas.</td>
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<td>For the next few meetings (until a process is set), the “agenda-setting group” (co-chairs and the secretary) will set each meeting’s agenda and publish it by the end of the day on Tuesday (at least 24-hours prior to PC meeting).</td>
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<td>30 mins</td>
<td>LDP App under the FOLIO Umbrella</td>
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<td>LDP App was not included in the Juniper Release</td>
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<td>See Community Council notes (2021-07-26)</td>
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<td>See Additional Information below: email from Angela Zoss (Reporting SIG) to Capacity Planning - 2021-07-22 and the response from Capacity Planning</td>
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<td>• description of the App vs. LDP (Angela/Nassib)</td>
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<td>• PC question: Should LDP App be included as part of the standard FOLIO build?</td>
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<td>• If so, is there a way to get it in Juniper, and what is needed?</td>
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<td>• If not Juniper, what is needed to include it in Kiwi?</td>
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<td>The “LDP App” is a low-barrier way for institutions with LDP installations to query LDP data without needing to know SQL for cross-app reporting. This app is on folio-snapshot now.</td>
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<td>The TC has spun up a group for technical requirements for something to be part of the FOLIO LSP.</td>
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<td>There are some questions about how LDP will integrate with FOLIO. Is LDP “in” FOLIO? “e-holdings” is an app that talks to an external system. LDP’s goal has been to make open source reporting available to FOLIO using a broad source of funding streams (including ReShare and another project that is also looking at LDP’s technology). For those that need it, there is a question of whether apps will be maintained—not only for LDP but for other important apps. Outside of this specific question, FOLIO needs some way to answer the question of reporting capabilities for the LSP apps.</td>
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<td>The reporting SIG sees benefits to release the LDP app on the same cycle as the other apps; as the data models change, the LDP app needs to keep up; and the efforts of SIG members (bugfest, etc) match the FOLIO LSP release cycle. The TC is action on the assumption that the PC will want the LDP app to be in the release and have started the review process. PC would like to make PC aware of having this process in place in time for LDP to meet requirements to be included in Kiwi.</td>
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<td>&lt;&gt; PC endorses the inclusion of the LDP app—pending the passing of criteria from TC—in the Kiwi release. (Kiwi release schedule)</td>
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Dear Capacity Planning Team,

I’m reaching out as convener of the Reporting SIG to follow up on the status of the LDP app and the process for getting it included as a new FOLIO app. The Reporting SIG recently learned that our LDP app - an app that allows people to access LDP data directly from FOLIO instead of using an external database query/SQL tool - was rejected from the Juniper release. The app has been in snapshot for months now and has been getting great feedback from users, who are anxiously awaiting the ability to connect to their LDPs using a non-SQL query builder and to use FOLIO permissions features to control that access. In late June, after following the public documentation for the Juniper release, our developers heard that the app had failed to meet several deadlines and would not be included in the release.

When asked for public documentation of the extra requirements so we could be sure to be in compliance in the future, no documentation was produced. As a SIG, we’re disappointed by the delay this will cause in getting the app to institutions waiting for it, but we’re even more concerned about the process of holding new apps to timelines and standards that are not clearly documented. The Reporting community has volunteered innumerable hours to the design of reporting solutions that meet the needs of community members, and we are relying on the broader FOLIO community to facilitate incorporation of that work into the FOLIO app infrastructure.

For the sake of transparency, planning our development resources, and announcing the timeline for reporting feature availability to FOLIO community members, we ask for a review of FOLIO release procedures and the timely creation of clear, public documentation of all requirements and deadlines for new apps, specifically before any deadlines for Kiwi pass. If there is any way for the LDP app to be placed on a fast track through previously undocumented requirements in order to be approved for Juniper, the Reporting SIG members would greatly prefer that.

Please do reach out if I can help in any way or answer any additional questions!

Thanks and best regards,

Angela

Hello Angela,

The deadlines to make a release are very well documented and posted for all to see. This has proven to be very successful as all FOLIO development teams and product owners have been very aware of those deadlines and drive to those deadlines for each release. In the case of Juniper, those have been posted since February and notifications of changes have been posted to Slack when needed. You can see that schedule that the FOLIO project uses [here](#). These dates are determined in advance by the capacity planning team which include Holly Mistlebauer, Khalilah Gambrell, Oleksii Petrenko, Mark Veksler, Jakub Skoczen, Mike Gorrell and myself. These dates are generated by working towards a target release date and based on past experience of the time it takes to get through each stage for a final release.

We agree that better documentation is required that describe the process that can be used to submit an application to be included in a FOLIO release. The TC is charged with this task and has started those discussions in earnest. There is an existing process of submitting code for review that has been used for previous submissions, but this is what requires documentation. Previous submissions in some cases were rejected due to concerns about security, architecture, UI issues and test coverage based on a review provided by assigned developers. In some cases, the rejected code was changed or test coverage provided (for example) and then the submission was re-evaluated and accepted.

The LDP app was built using the FOLIO platform, but is not currently part of the FOLIO code base, it exists outside of FOLIO. The expectation is that LDP will exist as a separate project under the OLF such as Reshare an Vufind. FOLIO is not responsible for building and releasing code maintained external to FOLIO and has not done so in the past. There is a growing body of code that exists outside of FOLIO that are open source and available to any library or vendor that wishes to use it. Duke has made code available as open source specifically for FOLIO that has not been submitted, yet is in use. The LDP app is in the same situation. Libraries and vendors that wish to use it can do so. Ultimately, this model supports the original vision of what FOLIO was to bring to the market and is a positive and healthy development. The fact that the LDP app is not part of the release should not stop any organization from using it. The TC will be evaluating the technical merits of including non-FOLIO apps as part of future FOLIO releases.

Thank you for reaching out,

Capacity Planning Team

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**Action items**