FOLIO Road and Prioritization Update

Prioritization and Roadmap Working Group

WOLFCon, August 22, 2023
Prioritization & Roadmap

Our Group/Our Charge

The 18-month Roadmap

★ Teams
★ High-level functional areas
★ Releases outlook via Dashboard

Prioritization: for the longer view

Challenges and next steps
Prioritization and Roadmap Working Group
Members

Jesse Koennecke, Cornell University, Chair
Jenn Colt, Cornell University
Debra Howell, Cornell University
Kristin Martin, University of Chicago
Martina Schildt, GBV
Charlotte Whitt, Index Data

Sharon Wiles Young, Lehigh University
Charge

Manage a holistic process for developing, reviewing, adjusting, and communicating the FOLIO Community Development Roadmap (Roadmap).

What components should this process address?

★ Feature prioritization
★ Identify themes and subthemes
★ Maintain roadmap that includes priorities
★ Clarify roadmap intersections with Release Planning, testing, and release schedule
★ Clarity on what’s targeted for development and what’s not
★ Articulate who’s responsible for identifying priorities
★ Integrate information about non-community development efforts into roadmap and priorities
★ Generate and update documentation/visualizations
18 Month Roadmap
Releases covered

- **2023-11-20** Poppy
- **2024-04** Quesnelia
- **2024-08** Ramsons
- **2024-11** Sunflower
- **2025-01** Trillium

*Release dates not set*
<table>
<thead>
<tr>
<th>EBSCO</th>
<th>Hebis + IndexData</th>
<th>Bienenvolk: GBV + Knowledge Integration</th>
<th>Sif: GBV + Index Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manages EPAM teams</td>
<td>Reminder fees</td>
<td>ERM functionality</td>
<td>Connections to union catalog</td>
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<tr>
<td>Large number of developers</td>
<td>Circulation add ons</td>
<td>ERM</td>
<td>German consortia requirements</td>
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<tr>
<td>Core ILS functionality</td>
<td></td>
<td>Dashboards</td>
<td>FOLIO Harvesting</td>
</tr>
<tr>
<td>(cataloging, acquisitions, circulation)</td>
<td></td>
<td>Dashboard Extension (1st ACQ widgets)</td>
<td></td>
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<tr>
<td>American consortial support</td>
<td></td>
<td></td>
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<tr>
<td>Institution Teams</td>
<td>Individual Developers</td>
<td>University Library Leipzig + Knowledge</td>
<td>K-Int, Duke, GBV</td>
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<tr>
<td>From American/European institutions and consortia Workflows Calendars Core ILS enhancements</td>
<td>From multiple institutions Join in teams as needed/where interested Enhance features across all functional areas</td>
<td>Usage statistics Open Access Number Generator</td>
<td>Serials Management (incl. claiming)</td>
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# 18 month outlook

<table>
<thead>
<tr>
<th>Platform</th>
<th>Acquisitions</th>
<th>Circulation</th>
<th>ERM</th>
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<tbody>
<tr>
<td>Lists app</td>
<td>Process invoices against previous FYs</td>
<td>Improvements to Requests workflow</td>
<td>GOKb synchronization re-write</td>
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<tr>
<td>Bulk edit suppression and deletion</td>
<td>Version history</td>
<td>Patron notices enhancements</td>
<td>Search implementation review</td>
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<tr>
<td>Consortia support</td>
<td>Display addl order info in inventory</td>
<td>Fees &amp; fines actual costs enhancements</td>
<td>Performance improvements</td>
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<tr>
<td>Workflow engine integration</td>
<td>Serials Mgmt/ publication patterns</td>
<td>Reminder fees</td>
<td>Tasklist/checklist support</td>
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<td>Dashboard Extension</td>
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## 18 month outlook: Metadata

<table>
<thead>
<tr>
<th>Cataloging</th>
<th>Data Import</th>
<th>Linked Data</th>
<th>Data export</th>
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<tbody>
<tr>
<td>Cataloging workflow improvements</td>
<td>Migration data improved</td>
<td>Manage BIBFRAME records</td>
<td>Performance and scaling improvements</td>
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<tr>
<td>MARC Authority control linking</td>
<td>Architectural &amp; Workflow improvements</td>
<td>Entity management for authorized access points</td>
<td>Suppressing fields from export</td>
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<tr>
<td>Search &amp; browse improvements</td>
<td>Scaling &amp; performance improvements</td>
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<tr>
<td>Improved in -app reporting</td>
<td>Improvements in business logic</td>
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Anticipated New Apps

<table>
<thead>
<tr>
<th>Lists</th>
<th>Workflows</th>
<th>Harvester</th>
<th>Service Interaction</th>
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<tbody>
<tr>
<td>Pulls together data using query parameters</td>
<td>Supports creation of workflows from FOLIO UI</td>
<td>Supports the data flow from union catalogue to Inventory Integrates with Harvester Admin functionality</td>
<td>Settings app for cross-app module settings  Provides number generator functionality</td>
</tr>
<tr>
<td>Creates lists across apps and record types</td>
<td>Supports interaction with active workflows across all FOLIO applications</td>
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<tr>
<td>Enables work and actions from lists</td>
<td>Supports multiple workflow engine provider implementations</td>
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Dashboards

Detailed dashboards (more to come!):
https://wiki.folio.org/display/PC/Roadmap+dashboards

- Feedback and suggestions on dashboards is welcome
- Dashboard requirements:
  - Minimal creation of new work for POs - use existing label list
  - Attempt to represent the “level problem” - both UXPRODs and stories/bugs are represented
  - Assigned release is entered by PO but it is an estimate until the release scope is set. Dashboards will need to be updated after each release (update filters) and ongoing communication with POs is essential
  - In addition to PC dashboards, lead PO creates release dashboards and release manager creates calendar, these are also very useful!
Prioritization for the Longer View
Prioritization

Manage the FOLIO feature prioritization process

What components should this process address?
★ SIGs priorities → empower SIGs to help set priorities
★ Institutions priorities → via synchronous and asynchronous SIG work

Steps
★ SIGs define their top priorities → will be added to JIRA as a SIG rank (new field)
★ Rank top 10 priorities for features with no dev team assigned
★ PC works with SIGs to rotate through different development areas on a regular basis and update those areas → keep roadmap up-to-date
Prioritization

Possible tools

★ Moving away from the idea of using Airtable
  ○ Status is uncertain
  ○ Each voting institution or SIG member would require a paid seat
  ○ May be too pricey for the project

★ Spreadsheets
  ○ Containing top prioritized features per SIG
  ○ Asynchronous participation is possible

★ Surveys
  ○ For institutional prioritization (if necessary)
  ○ Containing top 10 prioritized features
  ○ Asynchronous participation
Challenges and Next Steps
Challenges

★ FOLIO Project as “vendor” and “consumer” of the Roadmap
★ Distributed development: Teams and funders
★ Projecting: Assigned work, unassigned work, and undescribed work
★ Prioritization: Level of granularity
Next Steps

○ Publishing the Roadmap
○ Prioritization Process(es)
○ Ongoing updates
Discussion and Feedback