

Agenda July 12th 2019

FOLIO App Interaction Group

Meeting Time: 11:15 pm EST / 5:15 pm CET / 4:15 pm UK

Meeting URL: <https://global.gotomeeting.com/join/274108733>

[App Interaction Folio Wiki](#)

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Housekeeping:

- Convener and notes: Martina S.
- **Next meeting:** July 19th

Agenda items:

1. Agreements - Orders integration: [Create and link PO/POL from Agreement line](#)
 - [Minutes of related call](#) (June 7th)

Minutes:

- ★ MS: Brief introduction to the topic:

[UXPROD-1753](#)

Create and link PO/POL from Agreement line

Description

Sometimes a librarian may need to link an Agreement line to a POL, but the appropriate PO and/or POL won't already exist.

This feature is to support the process of adding the PO/POL starting from the context of an Agreement, supporting an effective and efficient workflow for the user

- ★ at the moment both AgrL and POL already need to exist before I can link them
- ★ user needs to be passed over to Orders to create the PO/POL and then come back to Agreements; seems disjoining; users would lose context
- ★ there is already a mechanism to start in Orders and trigger s.th. in Inventory; Inventory and MarcCat do it the same way
- ★ it would be good to do s.th. similar for Agreements; although there it would be more complicated, because you need to create a PO respectively agreement and a PO line respectively agreement line
- ★ we need to decide whether we want a solution just for i.e. ERM or for FOLIO; group tended to the latter
- ★ The use of plug-ins seemed like a good way to go
- ★ But: plug-ins have to be kept maintained; they need to be customizable and plug-and-playable (technical implementation vs. the user experience)
- ★ Questions are now: are there any other and/or better ideas to handle this and how much effort would there be needed for maintenance of plug-ins
- ★ OS: in addition to the just mentioned issue we would need to talk about the necessity to display more than the POL information on the agreement line, like the Vendor Name, Order Status and Order Type; those would come from the PO; at the moment an extra call is needed
- ★ FJ: why not take the user to the app where user needs to create s.th.; let the user create and save; then user will be taken back to where he/she started; system should remember where user started
- ★ MD: what about the dirty data you already edited? → storing for in-process edits will not be handled very soon; problem would need to be solved first
- ★ FJ: working with tabs will postpone but not solve the problem
- ★ **Option 1:** plug-ins
- ★ **Option 2:** user will be sent to app X, does what needs to be done and the system is smart enough to send the user back to continue what he/she was doing where he/she started → **Spike #1**

- ★ OS and FJ: the second seems to be the better option
 - ★ DB: we need to investigate whether the following is possible: save the dirty data in the form when we leave and complete a workflow in another application; then be sent back
 - ★ JC: where in the workflow is to do best such a storage; like local storage; then get the data out of the local storage again
 - ★ JC: a spike-worthy endeavor; it is worth to investigate; try to keep as simple as we can as far as maintenance is concerned
 - ★ OS: for the time of investigation users can use the tabs solution to create an order for an agreement
 - ★ JC: In the long run, we want better
 - ★ Question: How do you keep your plug-in in sync with what is going on in the module that it depends on
 - ★ **Option 3 = extended option 1:** Instead of them being separate, plug-ins might be hosted by those modules they tend to depend on; the apps that want to work with the plug-ins just make a request; would be less maintenance effort than plug-ins that are not maintained by the apps they depend on → **Spike #2**
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- ★ **Next steps:** @POs @John
 - POs will send the scenarios and workflows to John; ideally via Slack
 - John will investigate Spike #1 and Spike #2 and will
 - Define a story in JIRA
 - Tentative deadline: **July 26th** - then we will meet again with respect to this topic
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★ *Next meeting will be a follow-up meeting on the container topic*

Attendees list

Present	Name	Home Organization
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x	Ann-Marie Breaux	EBSCO
	Carole Godfrey	EBSCO
x	Craig McNally	EBSCO
regrets	Charlotte Whitt	Index Data
x	Dennis Bridges	EBSCO
	Felix Hemme	ZBW Kiel
x	Filip Jakobsen	UX lead on FOLIO, Founder of Samhæng
	Gill Osguthorpe	UX/UI Designer - K-Int
	Ian Ibbotson	Developer Lead - K-Int
	Jana Freytag	VZG, Göttingen
x	Khalilah Gambrell	EBSCO
x	Kirstin Kemner-Heek	VZG, Göttingen
X	Kristin Martin	Chicago
x	Laura Wright	University of Colorado Boulder
x	John Coburn	EBSCO - Stripes-Components Lead
regrets	Maike Osters	hbz, Cologne
x	Martina Schildt	VZG, Göttingen
x	Martina Tumulla	hbz, Cologne
	Mike Gorrell	Index Data

	Niels Erik Gilvad Nielsen	Index Data
x	Owen Stephens	Product Owner - Owen Stephens Consulting
	Sobha Duvvuri	EBSCO
x	Mark Deutsch	
x	Susan Martin	