

Season of Docs 2020 Project Report

Technical Writer: Lauren Gallina

Organization: [FOLIO](#)

Mentor: Marcia Borensztajn

Project: Expansion of End User Documentation of FOLIO Apps

Project proposal

For this project, I plan to work on creating and updating FOLIO documentation targeted at the end user. Since FOLIO is a library management system, the end user is library staff. Currently, the FOLIO wiki (<https://wiki.folio.org/>) contains some documentation, but it is minimal and not in a digestible format created with library staff in mind. The new documentation created out of this project will be hosted on a specific documentation knowledge base, which will be accessible from FOLIO's apps, and contain workflows relevant to the system and its library users. An initial set of documentation will be published on the site, starting with the circulation and course reserves functionality. I would like to contribute as much as I can to the documentation over the course of this "long running" project.

In looking into the FOLIO documentation project, I spoke with Marcia Borensztajn about FOLIO's needs and current documentation situation. As mentioned above, the FOLIO documentation needs to be updated, expanded, and reworked in order to successfully help its users. Documentation needs to be created to mirror standard library processes and, because FOLIO consists of different "apps" that work together, the system needs to be explained as a whole. Since I am a librarian, I am very familiar with the types of scenarios and workflows that FOLIO's users will likely be going through and need help with. Marcia is working on creating the new documentation knowledge base using markdown, Git, and Hugo. From this project, new documentation on FOLIO will be created and serve as a framework for the future.

Description of work done

As mentioned in the project proposal, no official documentation had been created when I started working on FOLIO. Since we were starting from scratch, the first thing Marcia and I did was to decide on a style guide to use for the documentation I was going to be creating, in order to have a consistent look and feel and establish a standard. After looking into a few different guides that would work for our project, we settled on using the [Google developer documentation style guide](#).

After selecting the style guide, I began working on writing the documentation. Marcia decided we should start with the resource access (circulation) documentation, and I began to document the Check in app. Since it was my first time directly working with FOLIO, I had many questions about the system. I met with the head of the Resource Access Subject Interest Group, Jana

Freytag, and she helped answer many of my questions and told me about the “bugfest” test environment and TestRail QA. These helped immensely with testing and writing about the different FOLIO apps.

After working on the Check In app, I moved to the Request app, Course Reserves app, and Circulation Log app. I proceeded similarly by working on drafts of the documentation and then meeting with the respective Product Owners, so they could answer my questions and help me make sure my documentation was correct. Marcia also helped along the way by giving me tips on refining my technical writing and keeping it consistent.

The last phase of my resource access project involved documenting circulation settings that were not necessarily captured when writing about the apps. This was the most intensive part of the project, because the settings were very intricate and detailed. Once this was completed, I reviewed and edited all of the documentation I had written, which was then reviewed by subject matter experts before being published to the [FOLIO documentation site](#).

Links to documentation

Resource access (circulation)

- [Check out](#)
- [Check in](#)
- [Requests](#)
- [Courses](#)
- [Circulation log](#)
- [Settings > Circulation](#)
- [Settings > Courses](#)

Summary of current state

After completing the resource access documentation, I began working on documentation for the Organizations app and Orders app, which are part of the acquisitions portion of apps. As of writing, I have developed detailed outlines of the apps and will continue working on them until completion.

FOLIO is very community based and relies on its members to determine the direction of the system. As a result, members are heavily involved in all aspects of FOLIO’s development, documentation included. During the last few weeks of my time working with FOLIO, a documentation working group containing community members representing different apps in the system has come together to continue the development of documentation in areas not covered by this project.

Challenges and learnings

The most challenging part of the project was getting started and learning the structure of FOLIO--figuring out who I needed to talk to about different parts of the system, what environment should I be using when documenting the system, and where to find any procedurals or definitions that would help me in creating documentation. I also encountered some challenges in the writing process with some of the more detailed apps that contained many fields that needed to be filled out, but Marcia was a great resource and provided useful guidance.

As a librarian, it was very informative and interesting for me to be a part of and contribute to an open source library management system. I learned a lot about FOLIO as a system, but also about the community of librarians and developers that are working together to create a customized software with particular library needs in mind.