Stacks

FOLIO

Acquisitions v.1. - Work & Data Flows

Prepared by Stacks

July 14, 2017

Agenda

1. Workplan
2. Workflow: a crash course
3. Process walkthrough:
   'Order Physical Monographs Process
   - Happy Path'
4. Providing feedback

The workplan

1. Discovery - Collecting user stories and use cases
2. Analysis - Translating the discovery into tangible deliverables
   a. Functional prototype
   b. Work and data flow diagrams
   c. Data model
3. Development - Based on the existing analysis deliverables

Workflow Diagrams

Providing Feedback

The RM SIG's feedback on the work/data flow is crucial. SIG members will be able to access the work package which lists:

- Workflow steps
- Data/information required for each step
- Contextual notes

The package also includes snapshots of major sections of the diagrams, the complete diagrams, and a notation legend.
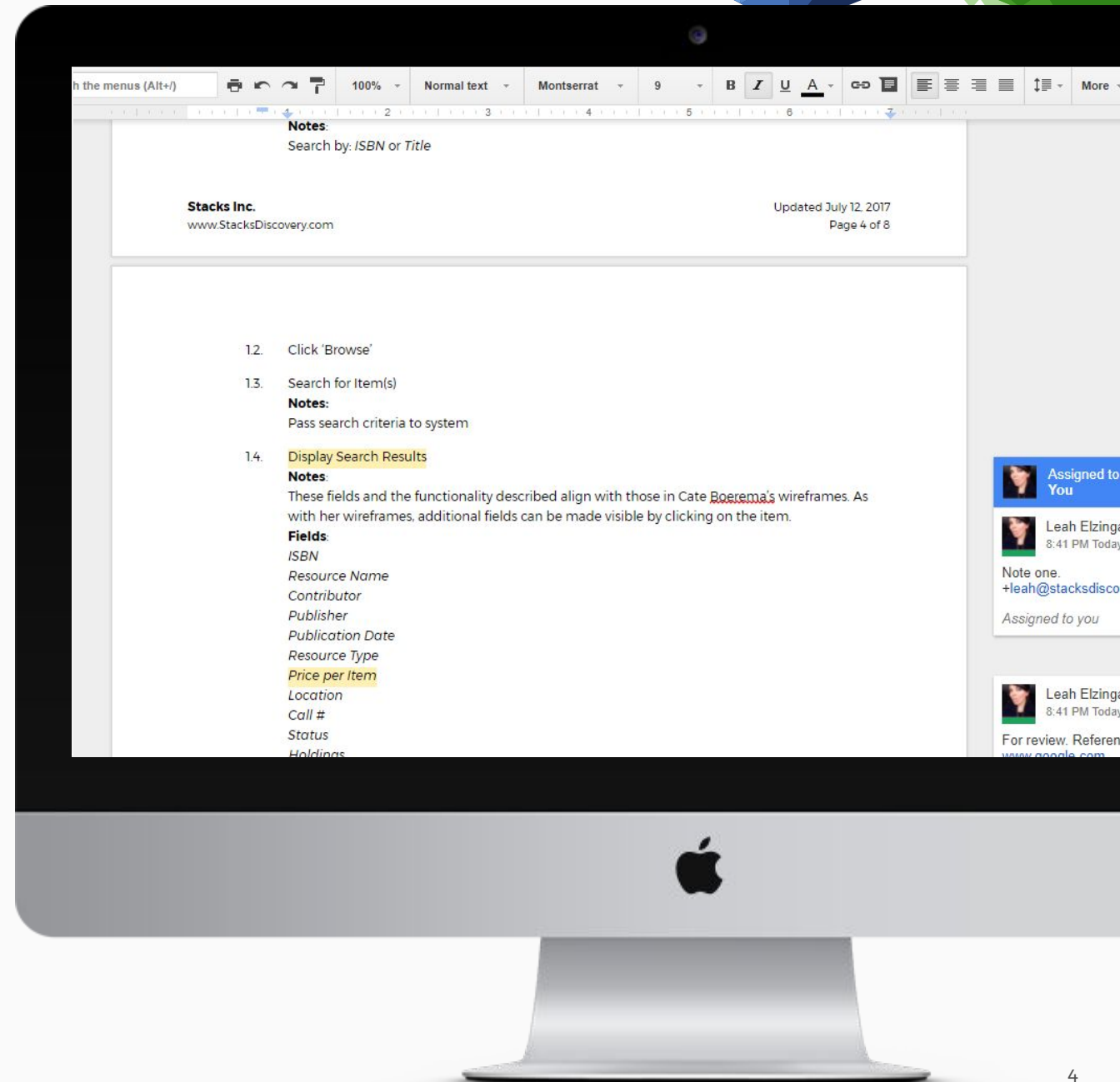
Workflow Diagrams
Providing Feedback

- Suggestions, clarifications, or questions should be added to the work package as comments.
- Stacks will moderate the comments
- Feedback received prior to the Wednesday before the next SIG meeting will be taken into consideration when generating the next iteration.
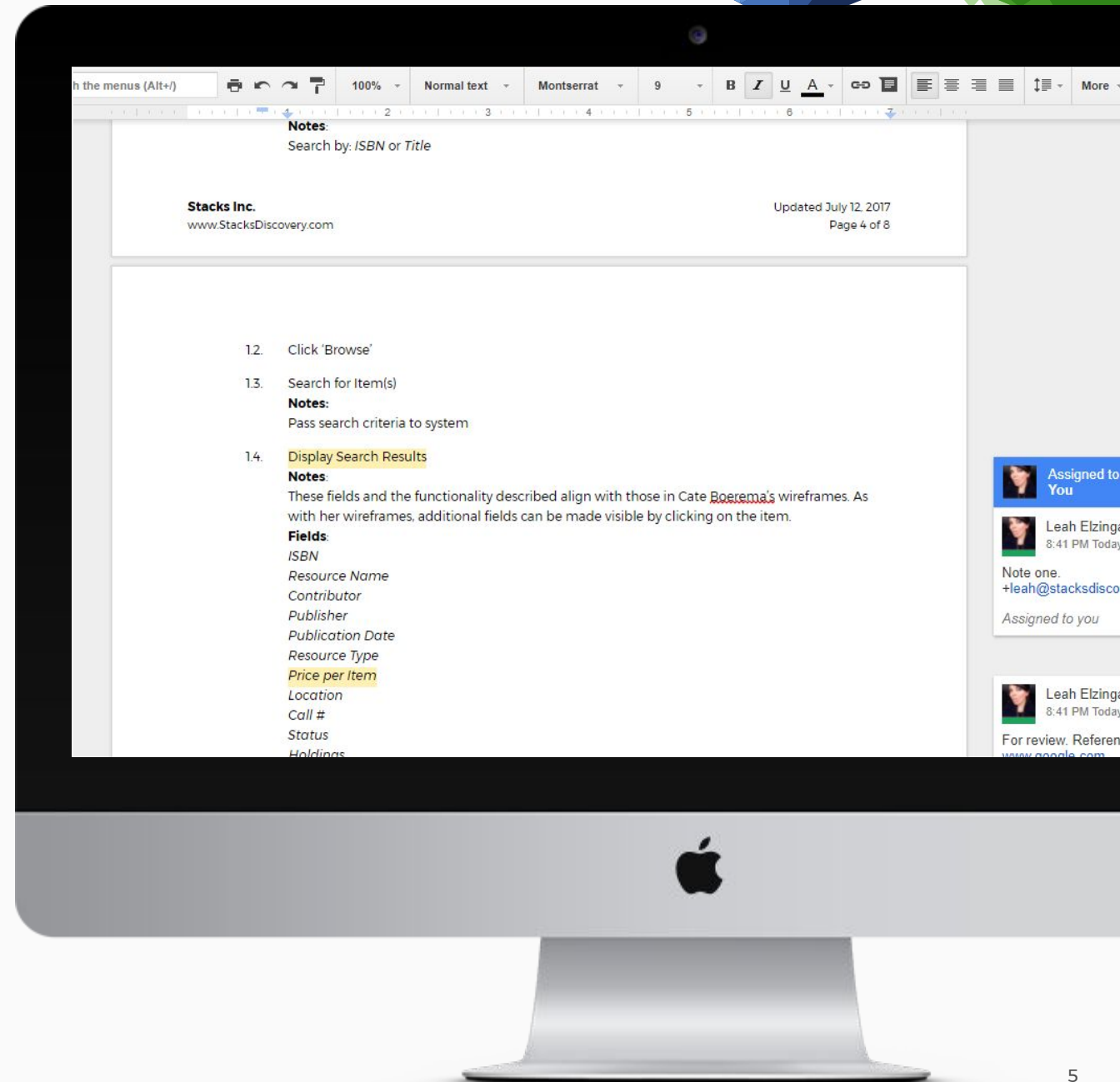
Workflow Diagrams

Workflow diagrams are drafted to illustrate key user stories/use cases.

The models are drafted using a modified version of the Business Process Modelling Notation (BPMN 2.0).

These models allow the development team to identify key components such as: navigation, data flows, required fields, validation, the relationships between activities, triggers and endpoints.

Workflow Diagrams

Stacks will be engaging with the SIG to validate the triggers, endpoints, workflow, naming conventions, validation, and data exchanges.

SIG members will be able to comment on a work package (shared through Google docs) that thoroughly details each workflow in question.

In general, simpler worklflows will be tackled first. This establishes a solid foundation upon which to build more complicated workflows soon after.

Workflow Diagrams

Legend

⬤	A step in the process. Each step is numbered (1., 1.1, 1.1.1). This number corresponds to the step in the list.
◆	A decision point. The process can go down one only one of the paths connected to this decision.
→	Move to the next step in the process.
- - - ▸	Move to the next step in the process, passing along some data or a communication.
✉	A communication. Implies that the next step cannot proceed unless data is passed along. Ex. The search cannot begin until the search criteria are passed to FOLIO.
🕐	A temporal condition; do not continue on to the next step until the condition is met.
◯	The process end state or condition.

Order Physical Monographs

Happy Path

Order Physical Monographs v1.0 - Happy Path
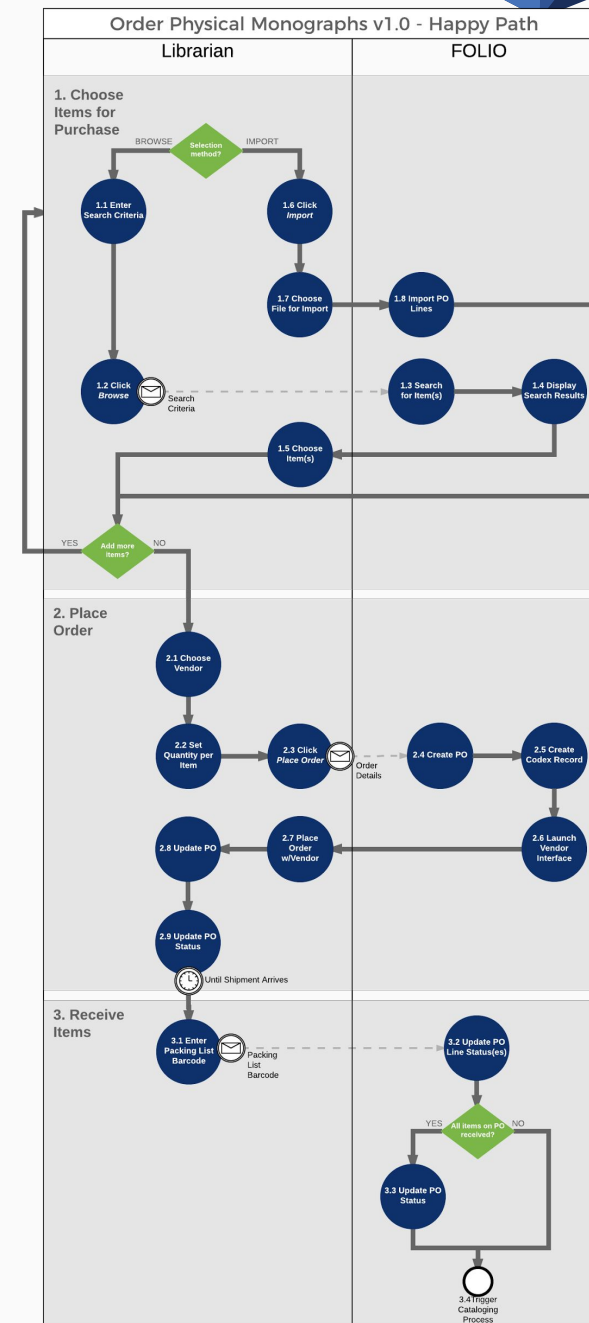
Order Physical Monographs

Happy Path

Three key subprocesses:

1. Choose Items for Purchase
2. Place Order
3. Receive Items

1. Choose Items for Purchase

◆ *Selection Method = Browse*

  1.1. Enter Search Criteria
  1.2. Click *Browse*
  1.3. Search for Item(s)
  1.4. Display Search Results
  1.5. Choose Items

◆ *Add more items?*

  IF yes, repeat Step 1.

  IF no, continue to Step 2.

1. Choose Items for Purchase
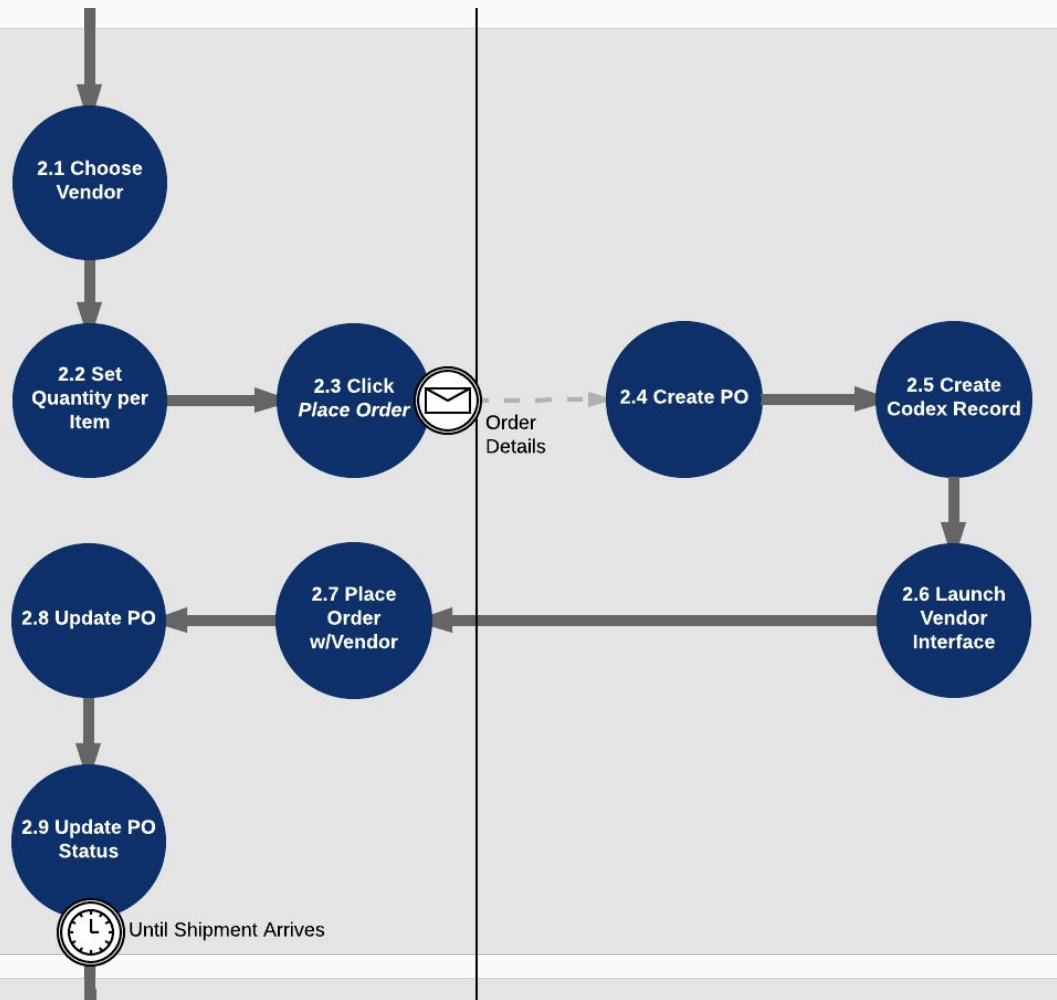
🔷 *Selection Method = Import*

- 1.1. Click *Import*
- 1.2. Choose file for import
- 1.3. Import PO Lines

🔷 *Add more items*?
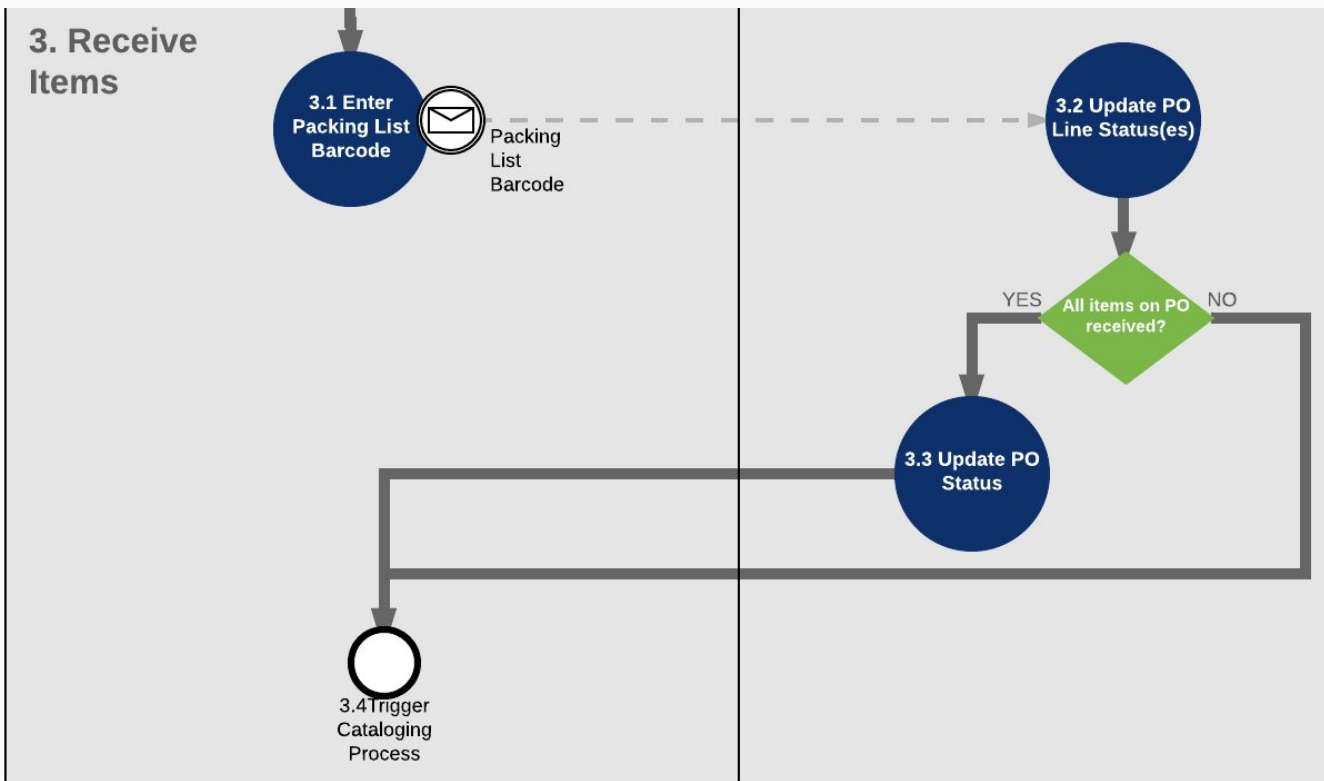
IF yes, repeat Step 1.

IF no, continue to Step 2.

2. Choose Items for Purchase

2.1. Choose Vendor

2.2. Set Quantity per Item

2.3. Click *Place Order*

2.4. Create PO

2.5. Create Codex Record

2.6. Launch Vendor Interface

2.7. Place Order w/Vendor

2.8. Update PO

2.9. Update PO Status

🕐 Wait until shipment arrives…

3. Receive Items

   3.1.   Enter Packing List Barcode
   3.2.   Update PO Line Status(es)

◆ *All items on PO received?*

   IF Yes continue to Step 3.3

   IF No skip to Step 3.4

   3.3.   Update PO Status
   3.4.   Trigger Cataloging Process

Next Steps

- Stacks to publish work package and slide deck
- SIG to provide feedback prior to next Thursday (July 20)
  Only feedback provided prior to this date will be considered for the next iteration

THANK YOU