MOBIUS

ReShare Working Group

2/21/2023

Agenda

- Introductions
- Your role
- Roadmap
- Where we at today
- Requirements and design fundamentals
- How we will work together

Introductions

[Working group list](#)

Your role

- First, **thank you!**
- Responsibilities
    - Participate in testing and to give feedback
    - Testing in your environment
    - Give unsolicited feedback - concerns, criticism, direction (no issue too small)
    - Requirements -- focus on "big block" capabilities down to *byte*-sized items
    - Ongoing collaboration via **Slack**, email, video conferencing, phone call, etc.
    - We will reciprocate

Product Roadmap: Increments to Launch

Timeframe	Spring	Summer	Autumn	Winter
Distribution	1	2	3	4
Distribution Goal	End-to-end data flow	Complete happy path	Handle priority exception scenarios	Apply QOL feedback
Key Features / Deliverables	- Core of Shared Index, Availability, Request Fulfilment - Sierra Integration - Documented API - Simulation mechanism - Logging and Analysis	- Library Onboarding - Admin UI - Polaris Integration - Routing - Admin Docs - Feedback mechanisms - Contributor Guidance	- FOLIO Integration - Support Operations - Collection Onboarding - LOCATE integration	- Support Docs - Performance tweaks - User interface enhancements - Training
Metrics / Deployment	Performance	Pilot	Feedback	Adoption

Distribution 1: **High Level Priorities**

DCB Functionality

- Create and Update Index
- Search and Request Item
- Loan from Lending Library
- Loan to Borrowing Library
- Loan to Patron

Enabling Tooling

- Elasticsearch Instance
- Interim Discovery System Interface
- Developer Admin UI
- Data Loads
- Sierra Mock Interface
- Sierra Test Interface
- Matching Rules UI

Out of Scope

- Patron Empowerment
- Circulation Reporting
- System Configuration

Supporting

- Documentation
- Simulation Mechanisms
- Logging and Analysis

Distribution 1: **DCB Story / Outcome Priorities**

Create and Update Index

- Get Delta Instances
- Verify Contribution Flag
- Prep for Indexing
  - *Priority Transformations*
- Match Instance
- Select Best Instance
  - *Priority Selection Rules*
- Index the Instance
  - Data Ingress (Bib, Holdings)
  - Data Egress (to ES)

Search and Request Item

- Basic Discovery System UI
  - Search for an item
  - Confirm item
  - Select pickup location
- Make Patron Request API
- Validate and Resolve Request
- Place Request in Sierra (no retry)
  - At Lender
  - At Borrower
- Handle Unresolvable Request

Loan from Lender

- Receive Item Request
  - Institutional Patron Config
- Poll for Fulfilment
- Poll for Return Check-in

Loan to Borrower

- ILS Config
- Place Request Notification
- Update / Close Request

Loan to Patron

- Poll for Item Return
- Poll for Return to Transit

Distribution 1: **Enabling and Supporting Tooling**

Data and API
- Elasticsearch Instance
  - Bibliographic Data
  - Holdings Data
- Library Directory
  - Sierra DCB -> Location Mapping
- Patron Token (Micronaut)

Services
- Clustered Index
- Availability
- Patron Request
- Scaled Polling

User Interfaces
- Interim Discovery System
- Development Admin
- Matching Rules

Sierra Integration
- Mock Interface
- Test Interface
- + interoperability test vs live instance

Supporting
- Documentation
  - ... APIs
  - Build / Deploy Guide
- Simulation Mechanisms
- Logging and Analysis
  - Audit API
  - Log Viewer

Getting Stories to Done

Peer Review **Done**

- Code for the issue written with accompanying tests
- Scripts and technical documentation updated
- All defined acceptance criteria met
- All tests pass when PR is raised
- Code reviewed successfully
- Code merged and deployed into QA environment
- Link to screen capture added to issue

QA **Done**

- Defined acceptance criteria are met by functionality
- Meets user experience, usability and UI conventions
- Business outcome is met
- Not blocked by another issue
- Performance testing completed and passed

Release **Done**

- Changelog updated
- Issue is referenced in tagged commit

Distribution **Done**

- Technical and non-technical Documentation updated
- All component parts released
- Distribution collection described and published

DCB Sprint Cycle

Day 1: **Tuesdays** 1pm-3pm (from 31 Jan)
- 2h Refinement / Sprint Planning

Day 8: **Thursdays**
- Confirm next sprint candidates (PO)

Day 9: **Fridays** 1pm-3pm (from 10 Feb)
- 2hr Parking Lot Review

Day 10: **Mondays** 1pm-3pm (from 13 Feb)
- 1hr Sprint Demo
- 1hr Retrospective

Feeding into:
Day +1: **Tuesdays** 5pm-6pm (from 14 Feb)
- Mobius Show & Tell

Daily async Slack check-in

Upcoming (also 1pm-3pm window)**:**
- Distribution 1 Dependencies and Sprint Mapping
  - Wed 25 Jan
  - Thu 26 Jan
  - Fri 27 Jan
  - Mon 30 Jan
- Tue 31 Jan: Sprint Planning
- Fri 10 Feb: Parking Lot
- Mon 13 Feb: Sprint Demo / Retrospective

Requirements and Design

- Requirements [add PDF doc to Slack channel]
  - Short version -- emulate INN-Reach
- Design
  - No new development on the ILS side (for Polaris and Sierra)
  - BUT, necessity being the mother of invention...
  - Use APIs for all three platforms (Polaris, Sierra, FOLIO)
  - **Completely** leverage circulation workflows to circulate between libraries regardless of platform
  - DCB had a bad wrap at iii. ReShare DCB, however, is playing a broker role but invisibly so.

Requirements and Design

- Requirements [add PDF doc to Slack channel]
  - Short version -- emulate INN-Reach
- Design
  - No new development on the ILS side (for Polaris and Sierra)
  - BUT, necessity being the mother of invention…
  - Use APIs for all three platforms (Polaris, Sierra, FOLIO)
  - **Completely** leverage circulation workflows to circulate between libraries regardless of platform
  - DCB had a bad wrap at iii. ReShare DCB, however, is playing a broker role but invisibly so.

Requirements and Design

- Requirements [add PDF doc to Slack channel]
  - Short version -- emulate INN-Reach
- Design
  - No new development on the ILS side (for Polaris and Sierra)
  - BUT, necessity being the mother of invention…
  - Use APIs for all three platforms (Polaris, Sierra, FOLIO)
  - **Completely** leverage circulation workflows to circulate between libraries regardless of platform
  - DCB had a bad wrap at iii. ReShare DCB, however, is playing a broker role but invisibly so.

Current progress

Just wrapping up sprint 2 and prepping for 3

Reached out to Springfield Greene to do some preliminary testing

Last week, had our inaugural demo. Ian, take it away

Demo

Working together

- Testing
- Requirements analysis
- From now through the end of beta
- Varying degrees of commitment is totally fine
- Partner profile: All three platforms + public, academic, special