Morning Glory
R2 2022
Release Digest
Who has made it

Key Morning Glory Features & Numbers
  Thunderjet
  Firebird
  Folijet
  Vega
  Spitfire
  Prokopovich
  Bienenvolk

Modules & Versions

Key Nolana Proposed Features

Useful Links
Who has made it
MEET THE TEAMS

- Spitfire
- Bienenvolk (ERM)
- Thunderjet
- Folijet
- Vega
- Leipzig
- Firebird
- Prokopovych
- Volaris
- K-Int
- BAMA
- Mjolnir
- Sif
- UNAM
- Core: Platform
- PTF
- FOLIO DevOps
- EBSCO - FSE
- Spring Force
- Stripes Force
- Leipzig
- Sif
Key Morning Glory
Features & Numbers
**BULK-EDIT**
- Users (csv)
- Item locations (in-app)
- Item statuses (in-app)

**CATALOGING**
- Delete authority records
- Export authority records
- Browse contributors
- MARC validation improvements – phase 1
  - (quickMARC) - display data field protection indicator
  - (quickMARC) - optimistic locking

**DATA IMPORT**
- Performance & stabilization
- Update inventory records by match on POL and VRN
- Add Administrative note to Instance, Holdings, and Items
- Data import log enhancements
- Data field protection improvements
- Permissions refinement

**INVENTORY APP**
- Search improvements

**ACQUISITIONS**
- Stabilization
- Export acquisitions data
- Add additional functionality to GOBI mapping profiles
- Update FOLIO<>EBSCONET order renewal logic
- Allow user to edit instance connected to POL
- Carry POL 'rush' indicator to corresponding receiving record
- Settings > Configure Organization types

**CIRCULATION / USERS**
- Title level requests

Morning Glory (R2 2022) dashboard - [https://issues.folio.org/secure/Dashboard.jspa?selectPageId=12204](https://issues.folio.org/secure/Dashboard.jspa?selectPageId=12204)
Morning Glory Features

Number of features: 91
Dev teams have created not only new deliverable features. They have been focused on quality improvements tied to integration tests development, making automated end-to-end tests, tech debt and etc.
During bug fest executed 2407 test cases – 190 in automated mode. Also 70 test cases were used for multitenant verification.
118 issues has been found while executing test cases by our testers

Morning Glory R2 2022 BugFest Issues
During bugfix period 401 issues were delivered as part of Morning Glory release: defects, stories, tasks and tech debt
MORNING GLORY FEATURES & NUMBERS

Defects in percentage at release
- DevelopmentDefects
- BugTestDefects
- BugTestRegressionDefects

Features at release
- 2019 Q3: 93
- 2019 Q4: 89
- 2020 Q1: 66
- 2020 Q2: 65
- 2020 Q3: 66
- 2020 Q4: 93
- 2021 Q1: 102
- 2021 Q2: 116
- 2021 Q3: 91

Defects count at release
- DevelopmentDefects
- BugTestDefects
- BugTestRegressionDefects

Bugfest defects per feature at release
- 2019 Q3: 0.5
- 2019 Q4: 0.6
- 2020 Q1: 0.8
- 2020 Q2: 1.7
- 2020 Q3: 2.1
- 2020 Q4: 1.6
- 2021 Q1: 1.6
- 2021 Q2: 1.2
- 2021 Q3: 1.6
- 2021 Q4: 1.1
- 2022 Q1: 1.2
- 2022 Q2: 1.2

Development defects per feature at release
- 2019 Q3: 3
- 2019 Q4: 4
- 2020 Q1: 8
- 2020 Q2: 10
- 2020 Q3: 12
- 2020 Q4: 11
- 2021 Q1: 10
- 2021 Q2: 7
- 2021 Q3: 7
- 2021 Q4: 7
- 2022 Q1: 15
- 2022 Q2: 15
Thunderjet
THUNDERJET TEAM

UXPROD-3600

Manage Voucher Export without needing to access settings

PROBLEM

1. Users must be granted access to settings area to manage voucher exports.
2. Configuration of export settings is accessible to users that only need to run or download exports.

SOLUTION

Move Voucher exports from settings to invoice UI and add separate permissions for accessing this function.

WORK

- UXNV-368 Add "Voucher export" to actions menu
- UXNV-369 Select batch group and display existing exports
- UXNV-370 Run manual export and display toast
- UXNV-371 Download batch export files from full screen view
Manage Voucher Export without needing to access settings
The GOBI integration currently provides configuration for populating limited number of Order and Order line data.

**SOLUTION**

- Add additional fields as potentially mappings for GOBI order data
- Add lookup translation for Account number and other necessary data points

**WORK**

- MODGGBI-129 Add acquisition unit and internal note fields to GOBI configuration mapping
- MODGGBI-132 Adjust GOBI mapping for subaccount to perform lookup
- MODGGBI-135 Allow GOBI order key to be added as a product ID so it can be mapped in GOBI orders
- MODGGBI-136 Add configuration to allow libraries to specify if a GOBI order key should be used
- MODGGBI-137 Invalid ISBN failing order line creation
- MODGGBI-152 Add additional PO/POL fields to GOBI configuration mapping
- MODGGBI-166 Move acq unit mapping logic in model to the translation object
- MODGGBI-167 Remove unusable fields from mapping

**PROBLEM**

Add additional functionality to GOBI mapping profiles
THUNDERJET TEAM

UXPROD-3257

Update FOLIO<>EBSCONET order renewal logic

PROBLEM

When users choose not to renew material FOLIO is not able to cancel those orders. Notes that users add in the EBSCONET interface are not carried over to FOLIO

SOLUTION

Mapping order type data from EBSCONET to set order line status to cancelled when needed. Adding additional data mappings to capture notes.

WORK

- MODEBSNET-19 Update logic for supporting fund expense classes
- MODEBSNET-16 Dates are being input as 01/01/0001
- MODEBSNET-22 Support canceling POL(s) through EBSCONET integration
- MODEBSNET-27 Update logic for supporting "customer note" from EBSCONET
- MODEBSNET-30 Update logic for supporting "Renewal note" from EBSCONET
- MODEBSNET-33 Update logic for supporting "customer note" from EBSCONET
- MODEBSNET-39 Renewal note is blank after update
- MODORDERS-636 Update po lines when an order is closed with the "Cancel..."
- MODORDERS-663 Update PO workflow status based on cancelation of POLs.
- MODORDERS-664 Release encumbrances when POL payment status is set t...
- MODORDERS-682 Remove Renewal date and renewal interval requirement f...
- MODORDERS-714 Fix issue with Receipt and Payment statuses when order i...
- UIOR-749 Add cancel POL action and display indication that POL is canceled.
- UIOR-889 Add cancel PO action and display indication that PO is canceled.
- UIOR-961 Renewal date and renewal interval no longer required
- UIOR-965 Display "Renewal note" field on POL
# THUNDERJET TEAM

## UXPROD-3619

Allow user to edit instance connection of POL

### PROBLEM

When a purchase orders is connected to the wrong instance there is no way to correct it. Unopening orders to do this is can cause issues with the receiving workflow and existing order<>inventory record relationships.

### SOLUTION

Add action that allows users to change connection between order line and instance. When changing connection FOLIO will update all related inventory records as needed.

<table>
<thead>
<tr>
<th>WORK</th>
<th>MODORDERS-683 Define new Business API for updating Instance Reference for Non-package orde...</th>
<th>CLOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MODORDERS-684 Implement edit instance connection logic of POL - create inventory set to Instan...</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDERS-685 Implement edit instance connection logic of POL - create inventory set to Instan...</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDERS-718 PO Line details are not updating after changing instance connection from POL</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDERS-730 Item not appearing under holdings after instance connection change</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDSFO-297 Define data model for supporting edit instance connection logic of POL</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDSFO-298 Define new Storage API for updating Instance Reference for Non-package ord...</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDSFO-299 Implement PATCH Storage API for updating Instance Reference for Non-packa...</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>MODORDSFO-311 Change instance updates POL details but not UUID and items not appearing</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>UIOR-594 Edit instance connection of POL - create inventory set to Instance, holding or Instance, h...</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>UIOR-936 Edit instance connection of POL - create inventory set to Instance or none</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>UIOR-997 Display toast when Edit instance connection of POL is successful</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>UIOR-942 Edit instance connection of POL - option to delete abandoned holdings</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>UIOR-979 Instance connection of POL (integration with back end)</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>
UXPROD-3619

THUNDERJET TEAM

Allow user to edit instance connection of POL
THUNDERJET TEAM

UXPROD-3435

Export invoice data in delimited file format

**PROBLEM**

FOLIO is unable to provide the full scope of reporting required by institutional financial auditors. Users are not able to manipulate financial data in the UI.

**SOLUTION**

Extend the ability to export data in a delimited format to the Invoices app, using the same model implemented in the Orders app to extract invoices and their related record data.

**WORK**

<table>
<thead>
<tr>
<th>Work Item</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>UINV-366</td>
<td>CLOSED</td>
</tr>
<tr>
<td>UINV-367</td>
<td>CLOSED</td>
</tr>
<tr>
<td>UINV-393</td>
<td>CLOSED</td>
</tr>
<tr>
<td>UINV-384</td>
<td>CLOSED</td>
</tr>
<tr>
<td>UINV-385</td>
<td>CLOSED</td>
</tr>
<tr>
<td>UPFFPOL-41</td>
<td>CLOSED</td>
</tr>
<tr>
<td>URSSQCGOMP-84</td>
<td>CLOSED</td>
</tr>
<tr>
<td>URSSQCGOMP-88</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>
Export invoice data in delimited file format
UXPROD-3662

Export piece data in delimited file format

**PROBLEM**

Users are not able to review piece data for multiple titles at once in the UI. Receiving data cannot be printed easily from the UI.

**SOLUTION**

Extend the ability to export data in a delimited format to the Receiving app, using the same model implemented in the Orders app.

**WORK**

- UIREG-339 Add "Export results (CSV)" action to receiving app [CLOSED]
- UIREG-384 Allow user to select data points for Export results to CSV [CLOSED]
- UIREG-225 Export pieces functionality - FE approach [CLOSED]
UXPROD-3662

Export piece data in delimited file format
UXPROD-3620

The ability to EXPORT fund detail via csv file

PROBLEM

Users are not able to manipulate financial data in the UI. It is also difficult to print and share this data with colleagues who may not have access to FOLIO.

SOLUTION

Extend the ability to export data in a delimited format to the Finance app, using a slightly modified workflow to meet the unique requirements of Finance users.
UXPROD-3620

The ability to EXPORT fund detail via csv file
Firebird
**PROBLEM**

FOLIO does not support bulk edit of the records and any changes in them need to happen for each record separately. [UXPROD-868](#)

**SOLUTION**

New FOLIO module called “Bulk edit” where users can perform bulk edit operations with support of 2 approaches: CSV approach for User records and In-app approach for item records. CSV approach is powerful, but designed for power users familiar with FOLIO's data structure. In-app approach, preferred by the community, guides users through the bulk edit process.
Find records video
Currently all location changes need to be made one by one and the changes of the items locations are very frequent as the items are being taken on or off reserve, display or new books.

SOLUTION

- Have the ability to scan a bunch of materials (maybe during check-in) and then perform a batch change on all the item records (e.g. change location, change item status, or update damaged field)
- Have the ability to identify a batch of item records with the same characteristic (e.g. temporary location = course reserve) and change them (e.g. remove the temp location)

IN SCOPE

- Identify records that will be updated based on item barcode, current location, etc
- Identify records that will be updated based on the query
- Add, remove and modify items temporary and permanent locations
- Provide a feedback about encountered errors
- Provide ways to address the errors
Problem
Currently all status transitions need to be made one by one and the changes of the items statuses are frequent as the items can be moved to another location, included in the exhibition, etc.

Solution
• Have the ability to change status to "Unavailable" when the books are being included in the exhibition
• Have the ability to change status to "Restricted" when the items were moved to remote location

In Scope
• Identify records that will be updated based on item barcode, current location, etc
• Add, remove and modify items temporary and permanent locations
• Provide a feedback about encountered errors
• Provide ways to address the errors
Edit inventory video

[Image of a computer screen showing a web interface with a bulk edit tool for managing inventory items. The interface includes a table with columns for barcode, status, item effective location, effective call number, item HIN, material type, permanent loan type, and temporary loan type. Additionally, there is a section for errors with a list of records matched versus errors.]
FOLIO does not support bulk edit of the user records and any changes in them need to happen for each record separately.

**SOLUTION**

- Change e-mail address for all affected users when the institution domain changes
- Bulk edit expiration date for users. Criteria: Patron group, current expiration date, Blocking status, Department, Custom fields, etc.
- Bulk edit Patron blocks based on a list/file of users to be uploaded.
- Etc.

**IN SCOPE**

- Save the file with the records that match the search criteria
- Upload the modified file so that the changes are posted
- Handle exceptions
- Notify user about the exceptions
Edit users video
Folijet
UXPROD-3623

Refine Data Import Field protection

PROBLEM

1. MARC field protection settings are honored only when there is an explicit Update SRS MARC Bib action
2. Overriding of field protections don’t work

SOLUTION

• Honor settings when the profile has Update Instance action
• Account for repeatable and non-repeatable fields properly
• Confirm that protected fields can be removed from an incoming record at the end of a job (e.g. remove 856s)
• Also fixes the overriding of field protections

WORK

1. MODDICORE-146 SPIKE: Instance & SRS record updates need to honor MARC field protections
2. MODDICORE-248 MARC field protections apply to MARC modifications of incoming records when they should not
3. MODDICORE-265 Implement method to update record fields according to field protections
4. MODINV-686 Add source record preparation before mapping to instance for instance update
UXPROD-3471

Implement flow control for Data Import

**Problem**

Single Record Imports takes excessive time to complete when a large Data Import job is running

**Solution**

Pause Consumer in SRM that consumes events published by mod-data-import, which allows for records coming through API of SRM (OCLC single record imports) to be processed. It is configurable how often the Consumer can be paused

**Work**

1. **ARCH-14 SPIKE**: Investigate opportunity to not take extended time for OCLC single record import while large file is importing
2. **MODSOURMAN-690 SPIKE**: Review impact on MDCPCT and UIIN
3. **KAFKAWRAP-18**: Add implementation pause/resume methods to support DI flow control
4. **MODSOURMAN-662**: Implement flow control logic in SRM for Kafka messages processing
5. **MODSOURMAN-796**: Change logic to initialize job execution progress after reading file instead of processing the first chunk
UXPROD-3471

Implement flow control for Data Import
UXPROD-3429

Data import Stability/Reliability/Performance work

**PROBLEM**

1. Handling of duplicate events when record processing is finished can cause confusing information in DI log
2. Retrieving DI log entries takes excessive time

**SOLUTION**

- Skip sending of DI_ERROR events in case of duplicates
- Improve performance for SQL query to retrieve log entries
- Remove JobExecution cache

**WORK**

1. MODINVSTOR-894 Create Instance Optimization
2. MODDICORE-254, MODINV-664 Add logic to skip sending DI_ERROR from mod-inventory in case for duplicates - Morning Glory
3. MODSOURMAN-710 [100k-500k imports] Improve performance of SQL query for retrieving log entries for particular job execution
4. MODSOURMAN-792 Fix Race Conditions During Mapping Parameter Initialization
5. MODSOURMAN-791 Reduce Conversion of Parsed Content Into A MARC4J Record
**UXPROD-3502**

Enhancements to the Data Import

**PROBLEM**

1. Users must be able to delete specific logs
2. Users must be able to see a summary of the results of an import job without having to scroll through all the records in a file
3. The error counts in the individual job summary should be displayed as hotlinks, so that the list of records in the file can be filtered to only show particular errors
4. When viewing long logs, users want to have pagination instead of "Load more"
5. When viewing a list of logs, users want different status terms for jobs that were stopped/failed by FOLIO versus jobs that were manually stopped by users

**SOLUTION**

- Add ability to delete logs, add checkboxes to be able to select several/all logs
- Implement job summary at top of log details
- Add filter to only view errors
- Adjusted some error language
- Add new "Cancelled by user" status for jobs that are stopped manually
- Style updates, for consistency:
  - Implement pagination (instead of Load more) for Log list and Large imports
  - Adjust hotlinks UI/UX
Enhancements to the Data Import
Match on POL and VRN to update related Inventory

**Problem**

Users must be able to use the Order POL or any of the POL’s Vendor Reference Numbers to Match to related Inventory Instances, Holdings, and Items, to be able to update them with Shelfready MARC data.

**Solution**

To add options for matching to an Inventory Instance Holdings and Items based on Purchase order line numbers (POLs) or Vendor reference numbers (VRNs) associated with it.

**Work**

1. **UIDATIMP-1046** Update match screen UI for Instances
2. **UIDATIMP-1047** Update match screen UI for Holdings
3. **UIDATIMP-1048** Update match screen UI for Items
4. **UIDATIMP-1052** Check for accessibility issues on updated match screens and fix
5. **UIDATIMP-1161** Update Data import UI permission for POL/VRN
Match on POL and VRN to update related Inventory

---

### Purchase order

- **PO number**: 10007
- **Vendor**: GOBI Library Solutions
- **Order type**: One-Time
- **Acquisition units**: 

#### Approval date
- **Date opened**: 5/19/2021, 9:55 AM

**Note**: Check credit card statement to make sure payment shows up.

### PO summary

- **Total units**: 1
- **Total estimated price**: $14.00
- **Total encumbered**: $14.00
- **Total expended**: $0.00

### PO lines

<table>
<thead>
<tr>
<th>P0 number</th>
<th>Title or package name</th>
<th>Product ID</th>
<th>Vendor reference number</th>
<th>Fund code</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>10007-1</td>
<td>These Englands</td>
<td>213621</td>
<td>122646</td>
<td>A0P400</td>
<td>$14.00</td>
</tr>
</tbody>
</table>

### Related invoices

The list contains no items.
**UXPROD-2892**

**Data Import: Add Administrative note to Instance, Holdings, and Items**

**P R O B L E M**

Users need to enter notes that describe decisions, why they were made, variations from standard procedures, etc. The Inventory Instance notes are often controlled by the underlying MARC record, and they relate to the bibliographic description. This note field would live in the administrative section of the record and would not be controlled by any underlying source record. It may be useful to include in Instances, Holdings, and Items.

**S O L U T I O N**

Add Admin note field to the filed mapping profile Create/Edit screen for the Instances, Holdings, and Items record types.

**W O R K**

1. **UIDATIMP-1118** Add Admin note field to the Instance field mapping profile: Create/Edit
2. **UIDATIMP-1119** Add Admin note field to the Holdings field mapping profile: Create/Edit
3. **UIDATIMP-1120** Add Admin note field to the Item field mapping profile: Create/Edit
4. **UIDATIMP-1121** Add Admin note field to the Instance field mapping profile: View
5. **UIDATIMP-1122** Add Admin note field to the Holdings field mapping profile: View
6. **UIDATIMP-1123** Add Admin note field to the Item field mapping profile: View
Data Import: Add Administrative note to Instance, Holdings, and Items
Vega
UXPROD-1796

Title Level Requests Complete (part 1)

PROBLEM

In addition to item-level requests which require a particular item to be specified, users need to be able to place a title-level request (TLR) and let FOLIO to decide which item should fulfill it.

SOLUTION

1. TLR feature was implemented. It allows users to create title-level requests of any type (Page, Hold, Recall) while keeping the existing item-level requests functionality.
2. The request queue has been changed to include requests of both levels.
3. EDS integration has been switched to using "true" TLR.

WORK

1. UIREQ-619 Create item level request from item record
2. UIREQ-630 View & reorder requests (first accordion)
3. UIREQ-635 Turn an item level request into a title level request
4. CIRC-1296 Consider title-level requests during checkin
5. CIRC-1297 Consider title-level requests during checkout
6. CIRC-1298 Consider title-level requests during request queue management
7. CIRC-1358 Link page TLR to the item on creation
8. CIRC-1359 Link item to hold TLR when checked in
Title Level Requests Complete (part 2)

PROBLEM

1. When possible, a request policy should affect a title-level request in the same way it affects an item-level requests
2. It should be possible to enable and disable TLR feature while having open requests.

SOLUTION

1. TLR is now considering request policies for Page and Recall request types
2. A tool has been created to allow users to run migration jobs that recalculate request positions in queues after TLR feature is enabled or disabled

WORK

1. CIRC-1576 Consider request policy when TLR is placed
2. CIRCSTORE-329 Implement TLR feature toggle job service
3. UIREQ-722 Add success toast to Requests
4. UIREQ-728 Move page requests to first accordion of unified queue when reordering
5. UIREQ-747 Add success toast to duplicated Requests
6. UIREQ-757 Ensure Request details # (# requests) shows correct data
7. UIREQ-767 TLR: Add Move request to Action list when item is attached to title level request for fulfillment
UXPROD-3330

Data migration required by title level requests

**PROBLEM**

Existing request structure didn’t allow to implement title-level request without major changes in the request schema which would affect the existing item-level request functionality, including EDS integration

**SOLUTION**

1. Data migration mechanism to change data structure of the existing requests has been created
2. The existing item-level request functionality was changed to make it work with the new data structure

**WORK**

1. CIRC-1287 Implement Request data migration (business logic)
2. CIRCSTORE-295 Implement Requests data migration
3. CIRCSTORE-301 Adapt API to the data migration changes
4. CIRCSTORE-307 Test Requests data migration performance
**UXPROD-3402**

Title look-up for Requests (title level requests)

**PROBLEM**

Title look-up is not available when creating a new request (title level) from outside of Inventory (Users, Requests)

**SOLUTION**

Added possible for use title look-up plugin for title level requests

**WORK**

1. **UIREQ-675** Add title look-up to new request form
2. **UIPFI-91** Add possible for reuse title look-up plugin for title level requests
UXPROD-3392

Title Level Requests Complete
Spitfire
UXPROD-3345

Match on POL and VRN to update related Inventory

**Problem**

Users must be able to use the Order POL or any of the POL's Vendor Reference Numbers to Match to related Inventory Instances, Holdings, and Items, to be able to update them with Shelfready MARC data.

**Solution**

Implemented logic of matching entities based on POL number stored in 024$a, 924$a, 935$a, 980$a MARC fields. The Creation of a default profile was not considered in the scope of implementation, so a user should create this profile by himself, specifying in Match Profile the existing field pointing to POL.

**Work**

1. MODSOURMAN-778 Add permission for Purchase Order Lines matching
2. MODSOURCE-446 SPIKE & Implementation: Extend MARC-MARC matching to 9xx and 0xx fields
3. MODINV-578 Match logic for POL matches to Inventory records
4. MODINV-577 Match logic for VRN matches to Inventory records
5. MODDATAIMP-677 Add permission for Purchase Order Lines matching
6. MODDATAIMP-399 SPIKE: Allow POL or Vendor Ref Number match to trigger updates for related Instance, Holdings, Item(s), and SRS MARC
At the screen you see an example of MARC BIB file with POL number stored in 980 field subfield $a equal to "10008-1"
Delete MARC authority records via UI

**Problem**

User needs to have the ability to delete a MARC authority record via UI. A MARC authority record cannot be deleted if it is linked to another record.

**Solution**

Implementation for this feature used the common approach for working with entities via Data Import. User needs to have “MARC Authority: Delete MARC Authority Record” permission enabled.
UXPROD-3517
Delete MARC authority records via UI
UXPROD-3518

Browse instances by contributors

**PROBLEM**

Librarians want the ability to browse instance records via Inventory app by and mod-search must be updated to support.

**SOLUTION**

Added the logic to search Inventory Instance records based on contributor name search query via mod-search. An additional Name Type facet was added to browse results with the only name type user wants to view.

**WORK**

- MSEARCH-019 BE Implementation: Browse Contributors
- MSEARCH-067 BE Implementation unit tests: Browse Contributors
- MSEARCH-071 Contributors not indexed on reindex request
- MSEARCH-083 Existing contributor is not displayed at Browse contributors result list when user ...
- MSEARCH-086 The "Name type" filter doesn't account for the search query.
- STGCOM-1011 Browse contributors > Second pane should not show a horizontal scrollbar
- STGCOM-1016 Browse contributors. Placeholder match does not look right in the contributor colu...
- UNIN-2023 Inventory > Update Instance search options dropdown with Browse contributors
- UNIN-2057 Browse contributors > Second pane should not show a horizontal scrollbar
- UNIN-2058 Browse Contributors: Hitting Next/Previous has odd behavior
- UNIN-2059 Three pane view looks bad when coming from Browse contributors
- UNIN-2079 Browse contributors. Placeholder match does not look right in the contributor column
- UNIN-2106 The table columns size changes when user return to the "Browse inventory" pane
- FAT-1558 Karate - Create a Contributor Name Type facet
- MSEARCH-092 Create a Contributor Name Type facet
- MSEARCH-095 Matching record count for subjects and contributors browse
- MSEARCH-070 Tenant initialization error
- MSEARCH-074 Browse contributors: duplicate contributor
- STGMAEOM-076 Filters list doesn't update when user back to "Browse contributors" pane
- UNIN-2021 Inventory > Contributors Browse - Create a Name Type facet
- UNIN-2024 Browse contributors list
- UNIN-2060 Name Type facet sends requests to incorrect endpoint
- UNIN-2066 Applied filters don't reset when user select "Browse contributors" search option
- UNIN-2069 Filters list doesn't update when user back to "Browse contributors" pane
- UNIN-2007 Non-exact match placeholder message displayed when user switching between bro...
SPITFIRE TEAM

UXPROD-3518
Browse instances by contributors

Welcome, the Future Of Libraries Is OPEN!
UXPROD-3673

Export MARC authority records

**Problem**

Users want to have ability to export MARC authority records.

**Solution**

Extended ability to export Authority records in .csv format directly from the MARC Authorities app and in .mrc file is available in the Data Export app. The user needs to have "MARC Authority: View MARC authority record" and "UI: Data export module is enabled" permissions enabled.

**Work**

- **MDEXP-508** Spike: Export MARC authority records
  - Status: CLOSED
- **MDEXP-513** Support quickExport for Authorities IDs
  - Status: CLOSED
- **UIDEXP-275** Update Data Export > Are you sure you want to run this job? Confirmation modal to...
  - Status: CLOSED
- **UMARAUTH-120** Allow user to select MARC authority record(s) to export
  - Status: CLOSED
- **UMARAUTH-121** Export .csv file to load to Data export to create the .mrc file of selected auth...
  - Status: CLOSED
- **UMARAUTH-129** Add a Select all/Un-select all on Results List
  - Status: CLOSED
- **UMARAUTH-146** Export *.csv* file failed because of missing permission
  - Status: CLOSED
- **UMARAUTH-153** SelectAll/UnSelectAll checkbox functionality is buggy when placeholder row ...
  - Status: CLOSED
UXPROD-3673
Export MARC authority records
Prokopovich Inventory
Morning Glory (test in Bugfest MG (login: folio / password: folio):
Search enhancements

a. Exact match - quick display
b. Search by Holdings and Item UUID
c. Filter instance by Instance status
d. Filter holdings by holdings type
e. OCLC numbers normalized (now using mod-search)
f. ISBN normalized (keyword, identifier all, and ISBN search option)
g. ISBN and ISSN searches - incl.
   i. Invalid ISBN or ISSN
   ii. Linking ISSN
h. Search subjects (incl. browse)
Bienenvolk
ERM
Enhancements to Agreement Supplementary Properties/License terms
- New interface in settings with ability to search for a property/term (UXPROD-3410, UXPROD-3583, UXPROD-3582)
- Ability to deprecate properties/terms (UXPROD-3407)
- Date type for properties/terms (UXPROD-2337)
- Multi-select pick list type for properties/terms (UXPROD-3406)
- Categories for properties/terms for OpenAccess and other uses (UXPROD-3427)

Enhanced Package metadata in local KB (UXPROD-3591)
- Package identifiers
- Alternative names
- Status (e.g. current, retired)
- Availability scope (e.g. global, consortial, regional)
- Date/time the package data was created/updated in source knowledgebase

Move identifiers between titles in the local KB (UXPROD-3581)
Licenses and Agreements | Make Terms/Properties in Settings searchable, UX improvements for Licenses, UX improvements for Agreements

**PROBLEM**

Managing tenant defined terms and properties in Settings became difficult when there were many properties.

**SOLUTION**

Updated UI to allow for searching of the properties, using fourth pane for the display and edit of the properties

<table>
<thead>
<tr>
<th>WORK</th>
<th>COMPLETE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERM-2173</td>
<td>New / Edit supplementary property and Term modals: UX improvements (Settings app)</td>
<td>✔️</td>
</tr>
<tr>
<td>ERM-2043</td>
<td>Implement updated design for term management in license settings</td>
<td>✔️</td>
</tr>
<tr>
<td>ERM-1978</td>
<td>Add configurable OA properties to Agreements</td>
<td>✔️</td>
</tr>
<tr>
<td>ERM-1907</td>
<td>On License Terms settings screen ensure “New” button is always visible to user</td>
<td>✔️</td>
</tr>
<tr>
<td>ERM-1906</td>
<td>Re-work Supplementary Properties settings screen to use list that can be filtered and fourth pane display</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Levels and Agreements | Make Terms/Properties in Settings searchable, UX improvements for Licenses, UX improvements for Agreements
Licenses and Agreements | Ability to deprecate license terms/agreement supplementary properties

PROBLEM

The license terms and agreement properties that a library wants to record can change over time. As some terms or properties become less important they don't need recording, but the older licenses/agreements still have those values.

SOLUTION

Enable the 'deprecation' of terms and properties so they remain in the system and continue to display where they are already set, but they no longer appear as options for new licenses or agreements.
Licenses and Agreements | Ability to deprecate license terms/agreement supplementary properties

2018 Trial Agreement

Start date: 7/21/2022  
End date: -
Status: Requested  
Primary organization: Not set

Is perpetual: No  
Renewal priority: -
Description: -

Period

Period start: 7/21/2022  
Period end: -
Cancellation deadline: -

Internal contacts

Internal contact note: -
licenses and agreements | support date/time data types for custom properties

Problem:
Some of the terms and properties related to licenses and agreements can be date values, but there was no option to setup a date based term/property, unless it was already defined in the software.

Solution:
Add the ability to setup tenant defined terms and properties that store dates and enable those dates to be searched.

Work:

<table>
<thead>
<tr>
<th>Issue</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERM-2068</td>
<td>Add support for Date across License filters</td>
<td>CLOSED</td>
</tr>
<tr>
<td>ERM-2048</td>
<td>Add support for Date across Agreement filters</td>
<td>CLOSED</td>
</tr>
<tr>
<td>ERM-778</td>
<td>Add Date type to customProperties</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>
**UXPROD-2337**

**Licenses and Agreements | Support date/time data types for Custom Properties**

<table>
<thead>
<tr>
<th>License term pick list setup</th>
<th>Terms</th>
<th>Context</th>
<th>Label</th>
<th>Primary term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick lists</td>
<td></td>
<td>All</td>
<td>Bugfest#Open Access</td>
<td>Yes</td>
</tr>
<tr>
<td>Pick list values</td>
<td></td>
<td></td>
<td>Original Negotiation Date</td>
<td>No</td>
</tr>
<tr>
<td>App settings</td>
<td></td>
<td></td>
<td>Applicable Schools</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Delete user testing</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Free Form Disco</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>multiSelectTest</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of pages to download</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The Tiniest Term</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Use in Training Exercises?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Who killed Laura Palmer?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bugfest MG</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Consortial availability</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>I’m so excited for this multi-select pick list!</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Description:
This is the date of the contract signing. Start date corresponds to date of effect.

- **Label**: Original Negotiation Date
- **Name**: OriginalNegotiationDate
- **Primary term**: No
- **Order weight**: -31
- **Category**: Internal
- **Type**: Date
Licenses and Agreements | Support recording multiple values for a single term/property

**Problem**

Some of the terms and properties related to licenses and agreements can have multiple values all selected from a controlled list. For example, the types of authentication and authorisation supported by a platform might be "IP based", "SAML", "Username and Password". However, it was not possible for a single term/property to have multiple values, so instead, multiple terms were required.

**Solution**

Add the ability to setup tenant defined terms and properties that can store multiple values selected from a list and enable those values to be searched.

**Work**

<table>
<thead>
<tr>
<th>Issue ID</th>
<th>Summary</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERM-2157</td>
<td>Add multi-select support for custom properties</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2144</td>
<td>ERM-2157 / Support multi-select refdata properties in License term filter builder</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2143</td>
<td>ERM-2157 / Support multi-select refdata properties in Supplementary properties filter builder</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2142</td>
<td>ERM-2157 / Support multi-select refdata terms in License view</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2141</td>
<td>ERM-2157 / Support multi-select refdata properties in Agreement view</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2140</td>
<td>ERM-2157 / Support multi-select refdata terms in License edit</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2139</td>
<td>ERM-2157 / Support multi-select refdata properties in Agreement edit</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2138</td>
<td>ERM-2157 / Support multi-select refdata terms in License settings</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2137</td>
<td>ERM-2157 / Support multi-select refdata properties in Agreement settings</td>
<td>Closed</td>
</tr>
<tr>
<td>ERM-2123</td>
<td>Design tasks for support for the ability to choose multiple values for a single license term/agreement property</td>
<td>Open</td>
</tr>
</tbody>
</table>
UXPROD-3406

Problem

Some of the terms and properties related to licenses and agreements can have multiple values all selected from a controlled list. For example the types of authentication and authorisation supported by a platform might be "IP based", "SAML", "Username and Password". However it was not possible for a single term/property to have multiple values, so instead multiple terms were required.

Solution

Add the ability to setup tenant defined terms and properties that can store multiple values selected from a list and enable those values to be searched
Support for enhanced Package metadata in Agreements local KB

**Problem**

The local knowledgebase in agreements has limited options for storing metadata about e-resource packages. Remote sources, such as GOKb, that are used to populate the knowledgebase can be much richer, and where richer metadata is available it is useful to the user to be able to search using that metadata and see that metadata when viewing a package.

**Solution**

Add support for additional metadata fields for packages including:

- Package identifiers
- Alternative names
- Status (e.g. current, retired)
- Availability scope (e.g. global, consortial, regional)
- Date/time the package data was created/updated in source knowledgebase

**Work**

- ERM-2172 Populate extended Package metadata from GOKb data (hasMany properties)  
  - Status: CLOSED
- ERM-2121 Populate GOKb identifiers  
  - Status: CLOSED
- ERM-2120 Display package identifiers in Agreements UI  
  - Status: CLOSED
- ERM-2094 Populate GOKb UUID and ID as package identifier  
  - Status: CLOSED
- ERM-2092 Include package IDs in exports  
  - Status: CLOSED
- ERM-2076 Display package status and availability in package card  
  - Status: CLOSED
- ERM-2061 Search by extended Package metadata in resource search  
  - Status: CLOSED
- ERM-2060 Display extended Package metadata in package display  
  - Status: CLOSED
- ERM-2059 Populate extended Package metadata from GOKb data  
  - Status: CLOSED
- ERM-2047 Analysis of GOKb package identifiers  
  - Status: CLOSED
- ERM-2046 Support package identifiers  
  - Status: CLOSED
- ERM-2045 Extend Package data model to store additional information  
  - Status: CLOSED
UXPROD-3591

Problem

The local knowledgebase in agreements has limited options for storing metadata about e-resource packages. Remote sources, such as GOKb, that are used to populate the knowledgebase can be much richer, and where richer metadata is available it is useful to the user to be able to search using that metadata and see that metadata when viewing a package.

Solution

Add support for additional metadata fields for packages including:

- Package identifiers
- Alternative names
- Status (e.g. current, retired)
- Availability scope (e.g. global, consortial, regional)
- Date/time the package data was created/updated in source knowledgebase
Agreements Local KB: Move IDs between title instances UI

**Problem**

When importing title information into the Agreements local knowledgebase, the import process relies on title identifiers such as ISSNs and ISBNs. If there is an error and an identifier is assigned to the wrong resource it can result in errors on importing title data to the knowledgebase in the future.

**Solution**

Add support for moving identifiers between existing titles in the knowledgebase so such errors can be corrected.
### Agreements Local KB: Move IDs between title instances UI

#### E-resources

<table>
<thead>
<tr>
<th>Name</th>
<th>Publication type</th>
<th>ISBN</th>
<th>ISSN (Online)</th>
<th>ISSN (Print)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academy of Management Journal</td>
<td>journal</td>
<td>1948-0989</td>
<td>0001-4273</td>
<td></td>
</tr>
<tr>
<td>Africa Journal of Management</td>
<td>journal</td>
<td>2332-2381</td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Journal of Mathematical and Management Sciences</td>
<td>journal</td>
<td>2325-8454</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian Journal of Management Science and Applications</td>
<td>journal</td>
<td>2049-8691</td>
<td>2049-8683</td>
<td></td>
</tr>
<tr>
<td>Australian Journal of Environmental Management</td>
<td>journal</td>
<td>2159-5356</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collnet Journal of Scientometrics and Information Management</td>
<td>journal</td>
<td>2168-930X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EuroMed Journal of Management</td>
<td>journal</td>
<td>2055-1711</td>
<td>2055-1703</td>
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</tr>
<tr>
<td>European Journal of Cross-Cultural Competence and Management</td>
<td>journal</td>
<td>1758-1516</td>
<td>1758-1508</td>
<td></td>
</tr>
<tr>
<td>European Journal of International Management</td>
<td>journal</td>
<td>1751-6705</td>
<td>1751-6757</td>
<td></td>
</tr>
<tr>
<td>International Journal of Agile Systems and Management (IJASM)</td>
<td>journal</td>
<td>1741-9182</td>
<td>1741-9174</td>
<td></td>
</tr>
<tr>
<td>International Journal of Applied Management Science</td>
<td>journal</td>
<td>1755-8921</td>
<td>1755-8913</td>
<td></td>
</tr>
<tr>
<td>International Journal of Agricultural Management</td>
<td>journal</td>
<td>1755-8921</td>
<td>1755-8913</td>
<td></td>
</tr>
</tbody>
</table>

#### Configurations - FOLIO

- **Agreements - FOLIO**
- **Dashboard**
- **eHoldings**
- **ERM comparisons**
- **Licenses**
- **Local KB admin**

#### Search & filter

- **Agreements**
- **E-resources**
- **Platform**

#### Search filters

- **Tags**
  - **Is package**
  - **Yes**
  - **No**

#### Title filters

- **Type**
- **Publication type**

#### Package filters

- **External data source**
- **Scope**
- **Status**
- **Content type**

#### Actions

- **View 0 items**
Modules & versions

ui-developer-6.2.0
ui-handler-stripes-registry-1.2.0
ui-myp分流le-7.1.0
ui-plugin-find-erm-usage-data-provider-4.1.0
ui-plugin-find-fund-1.1.0
ui-plugin-find-package-title-4.1.0
ui-plugin-find-user-6.3.0
ui-servicepoints-6.1.0
okapi-4.14.4
mod-data-import-converter-storage-1.14.1
mod-graphql-1.10.2
mod-finance-storage-8.2.3
mod-orders-storage-13.3.3
mod-configuration-5.8.0
mod-codex-ekb-1.10.0
mod-inventory-storage-24.1.0
mod-inventory-update-2.2.0
mod-codex-inventory-2.3.0
mod-users-18.3.1
mod-data-export-worker-1.4.10
mod-login-7.7.0
mod-permissions-6.1.0
mod-pubsub-2.6.1
mod-circulation-storage-14.1.0
mod-rac-3.3.0
edge-rac-2.5.2
mod-user-import-3.6.6
mod-source-record-storage-5.4.2
mod-oai-pmh-3.9.1
ui-oai-pmh-3.2.2
edge-oai-pmh-2.5.1
mod-z3950-2.4.0
mod-inventory-18.2.2
mod-organizations-storage-4.3.0
mod-plugin-find-contact-3.2.0
mod-plugin-find-interface-3.2.0
mod-finance-4.5.2
mod-calendar-1.15.0
mod-event-config-2.3.0
mod-template-engine-1.17.0
mod-audit-2.5.0
ui-circulation-log-2.2.1
mod-email-1.14.0
mod-sender-1.8.0
mod-notify-2.11.0
mod-feesfines-18.0.2
mod-patron-blocks-1.6.0
mod-notes-3.1.2
ui-notes-6.2.0
mod-circulation-23.1.5
ui-checkin-7.1.1
ui-checkout-8.1.0
ui-circulation-7.1.0
ui-plugin-create-inventory-records-3.1.0
ui-requests-7.1.3
edge-sip-2.2.0
mod-ncip-1.11.1
edge-ncip-1.8.0
mod-patron-5.3.0
edge-patron-4.9.3
mod-tags-1.2.0
ui-tags-6.2.0
mod-orders-12.4.3
ui-acquisition-units-3.2.0
mod-gobi-2.4.3
mod-agreements-5.2.2
ui-erm-comparisons-4.2.1
ui-local-kb-admin-5.2.0
ui-plugin-find-agreement-8.2.0
ui-plugin-find-eresource-4.2.0
mod-licenses-4.2.1
ui-agreements-8.2.2
ui-licenses-8.2.2
ui-plugin-find-license-8.2.0
mod-courses-1.4.5
ui-courses-5.2.0
mod-service-interaction-1.1.0
ui-dashboard-2.2.0
mod-source-record-manager-3.4.5
mod-copycat-1.3.0
eedge-connexion-1.0.5
mod-data-import-2.5.0
mod-data-import-5.2.4
ui-plugin-find-import-profile-5.2.0
mod-kb-ebesco-java-3.11.1
ui-epheldings-7.2.3
mod-erm-usage-6.2.0
ui-erm-usage-4.4.0
mod-erm-usage-harvester-4.1.0
mod-invoice-storage-5.4.0
mod-eusage-reports-1.2.1
ui-plugin-eusage-reports-2.2.3
mod-invoice-5.4.1
ui-finance-3.2.1
mod-search-1.7.5
ui-plugin-find-instance-6.2.0
mod-data-export-4.5.1
ui-data-export-5.2.3
ui-inventory-9.1.13
mod-organizations-1.5.0
ui-invoice-3.2.3
ui-orders-3.2.2
ui-plugin-find-organization-3.2.0
ui-plugin-find-po-line-3.2.0
ui-receiving-2.2.0
mod-ebsonet-1.3.3
dedge-orders-2.6.3
mod-ldp-1.0.6
ui-ldp-1.8.0
mod-quick-marc-2.4.2
ui-marc-authorities-1.1.2
ui-quick-marc-5.1.2
mod-auth-token-2.11.0
mod-data-export-spring-1.4.5
ui-bulk-edit-2.0.3
ui-export-manager-2.2.3
ui-organizations-3.2.2
ui-plugin-bursar-export-2.2.1
mod-remote-storage-1.6.0
ui-remote-storage-3.2.2
dedge-caissoft-1.3.1
dedge-dematic-1.6.1
dedge-codex-mux-2.12.0
ui-search-5.1.0
mod-password-validator-2.4.0
stripes-smart-components-7.2.3
mod-users-bl-7.3.0
stripes-core-8.2.2
ui-users-8.1.3
mod-login-saml-2.4.9
ui-tenant-settings-7.2.0
Key Nolana Proposed Features
<table>
<thead>
<tr>
<th><strong>NOLANA PROPOSED FEATURES</strong></th>
<th><strong>BULK-EDIT</strong></th>
<th><strong>ACQUISITIONS</strong></th>
<th><strong>CATALOGING</strong></th>
<th><strong>DATA IMPORT</strong></th>
<th><strong>CODEX</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BULK-EDIT</strong></td>
<td>• Users - in app approach</td>
<td>• Stabilization</td>
<td>• quickMARC UX improvements</td>
<td>• Data import log enhancements</td>
<td>• Deactivate all FE/BE modules</td>
</tr>
<tr>
<td></td>
<td>• FOLIO holdings locations</td>
<td>• Preview fiscal year rollover</td>
<td>• Authority source file facet</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Item loan types</td>
<td>• GOBI integration interface to edit mapping files</td>
<td>• Elastic search - small enhancements (including search administrative notes via Query search)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>EXPORT</strong></td>
<td>• OAI-PMH stabilization</td>
<td>• Generate new orders from instance records</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Export Manager app stabilization</td>
<td>• Generate new invoices from order records</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ERM (INCLUDES EHOLDINGS)</strong></td>
<td>• Dashboard: Managed/shared dashboards</td>
<td>• Download or Re-send EDIFACT order export files from the Export manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Agreements: Search/Filter agreement lines and UX improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Agreements Local KB: GOKb Package metadata enhancements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Useful Links
Team vs module responsibility matrix
Morning Glory (R2 2022) Release Notes
Morning Glory (R2 2022) dashboard - https://issues.folio.org/secure/Dashboard.jspa?selectPageId=12204
https://morning-glory.docs.folio.org/
Nolana (R3 2022) Release plan
Orchid (R1 2023) Release Plan
Many Thanks