2023-6-27 Bulk Edit Working Group Meeting Notes

Attendees (please add your name):
Magda Zacharska Amanda Ros Lynne Fors Christine Tobias Kim Sara Coiglazier

Note Taker: Christine Tobias

Meeting Recording:
- Recording and chat: https://recordings.openlibraryfoundation.org/folio/bulk-edit-working-group

Discussion:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Notes</th>
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| 1 Housekeeping | - Attendees - please add your name to the list of attendees  
- Meeting host - please turn on Transcript option for the meeting  
- Who can take notes today?  
- High Level Bulk Edit Roadmap has been updated to accommodate new release schedule  
- Bulk edit Orchid Service Patch to address security issues in Java library (MODBULKOPS-P-109)  
- CSV vs In-app poll  
- Other topics?  
| Note taker: Christine Tobias  
| - Bulk Edit Roadmap schedule updated  
| - Accommodates release schedule  
| - Subject to change depending on development resources  
| - MODBULKOPS-109  
| - Module has been released and awaiting deployment in Orchid and Bugfest.  
| - CSV vs In-app poll  
| - How many are using csv approach in production? Respond to survey.  
| | - CSV approach = downloading .csv file, making changes, saving and uploading new .csv file  
| | - Big jobs such as fiscal year rollover use .csv approach  
| | - Comments:  
| | - CSV allows editing all fields, but requires skill and is cumbersome  
| | - Invest in in-app approach  
| 2 Development updates | Development status: Snapshot has the most recent code.  
| | - Development status  
| | - Development team scrum board  
| | - Issues from Orchid UAT  
| | - Issues from Poppy UAT  
| 3 Orchid UAT follow up | 1. MODEXPW-417 - Address type is represented by UUID instead of value  
| | a. Address Type is represented by UUID instead of value  
| | b. Unique value of address field. Prevents update of unique identifiers. Will not allow change in csv approach.  
| | 2. UIBULKED-275 - Order alphabetically the list of available columns  
| | a. Will add feature to filter/search by column name  
| | b. Once filtered, how do you continue to build your list?  
| | i. Comments: If multi-select is an option in one app, it should be available in Bulk Edit also so that apps behave consistently.  
| | ii. Will our selection be saved for next session? Will we have to uncheck the boxes to make a new list?  
| | d. In Agreements, there is an option to type in a filter, check it. This allows multiple selections. Click on x to remove all selections. Could this work the same for Bulk Edit?  
| | 3. UIBULKED-281 - Filter by start and end date - what should be the expected behavior?  
| | a. End Date? Search for past transactions? By date report was run?  
| | b. Labeling causes confusion. Columns are labeled “Started running” and “Ended running” and filters are labeled “Start Date: To From” and “End Date: To From”. Labels will be changed as an easy fix.  
| | c. Could we have a Filter by User option?  
| 4 | Meeting adjourned: 11:01am (ET) |
|   | Poppy UAT follow up                                                                 | 1. **UIBULKED-314** - Remove "New bulk edit" button  
   |                                                                                        | 2. **MODBULKOPS-120** - Correct encoding of extended ASCII characters while saving matching records  
   |                                                                                        | 3. Error message consistency: field level errors and warnings vs. record level errors and warnings  
   |                                                                                        | 4. Logs - sorting/ filtering by users                                                    |
|---|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| 5 | **Bulk edit holdings notes** - **(UXPROD-4020)**                                       | **Bulk Edit - Item, Holdings and Instance Notes**                                            |