2023-11-16 Metadata Management Meeting notes

Date
16 Nov 2023

Attendees
~26

Note taker: Laura Daniels, Lynne Fors, Alissa Hafele (11/16/23), Natascha Owens

Recordings

Recordings of meetings can be found in the Metadata_Management_SIG > Recordings folder on AWS from 2022 onwards: https://recordings.openlibraryfoundation.org/folio/metadata-management-sig/

Discussion items

<table>
<thead>
<tr>
<th>Announcements</th>
<th>Felix Hemme</th>
</tr>
</thead>
<tbody>
<tr>
<td>No meeting next week, November 23rd due to Thanksgiving in the US</td>
<td></td>
</tr>
<tr>
<td>Inventory Exports topic moved to new year - more time to add use cases 2024-01-18 Metadata Management Meeting notes</td>
<td></td>
</tr>
<tr>
<td>Poppy release date: The new GA (for non-ECS and ECS): Dec 18th</td>
<td></td>
</tr>
<tr>
<td>FOLIO Implementers Group is talking about Reading Rooms in FOLIO on November 28th. See #folio-implementers on Slack for meeting info.</td>
<td></td>
</tr>
</tbody>
</table>

[UXPROD-1835 - Reading Room Feature DRAFT]
Poppy release functionality for bulk edit, data export and OAI-PMH

Ma

gda

Za

ars

ka

Poppy release - PO update

Demo given at end of slides

Because of extension, completed more than planned!

Bulk edit

- bulk edit query (front end only, used in list app)
- suppressing items and holdings
  - suppressing/unsuppressing
  - holdings can apply to underlying items
- item notes:
  - some UI changes - each note type presented in separate column
  - same notes still in 1 column - addressed in Q release
  - Property grouping for drop down menu for easier navigation
  - item note types dynamically generated (so new item note type added in settings will be available for bulk editing)
  - set note as staff only or remove, remove all notes, add new, modify based on matched text
  - check in/check out notes can be duplicated
- bug fixes and enhancements
  - ordered record types alphabetically
  - no values selected by default
  - grouped properties
  - user filter in logs
  - removed new bulk edit button
  - query tab hidden for now
  - can download all files used in bulk edit from Actions menu in log

Data Export

- single instance export from instance detailed view
- searching existing mapping and job profiles
  - when export is triggered and select profile screen is presented, can now search to narrow results
- notify users of duplicate SRS records in export
  - shows in log screen, click to see error message with SRS ids
- exported shared instance from tenant (ECS)
- investigation of performance improvements (related to LC reqs)
- enhancements, bug fixes, tech debt
  - accessibility improvements for screenreaders

OAI-PMH

- Harvesting inventory only
  - MARC records are generated via default mapping for data export and enriched with holdings and items data
  - bad data = e.g. references to non-existing record types or locations, bad characters
  - if record cannot be handled it is logged
    - logs kept by default for 30 days (can be modified via API call to mod-configuration)
    - logs are new tab in oai-pmh settings with separate permissions
    - click download to see request (harvest) id, instance id, error message
    - error messages will be improved in future releases
- performance (investigation and improvements)
- harvesting across multiple tenants (ECS)

Quesnelia Plan

- Improve data export performance
- bulk edit
  - query tool
  - holdings electronic access
  - holdings notes
  - instances - suppress

Questions

- Have you considered surfacing the oai-pmh logs via the dashboard app?
  - Settings was quickest solution - dashboard solution makes sense but will need to be future release. Fully booked for LC and consortia work.
**Delay of Poppy Release until 12/18/23:** Testing is still going on for ECS (extended consortia support) and RTR (refresh token rotation). The RTR will be rolled out as turned off so that institutions can decide to test and enable it if they want. See the Release Management Stakeholder’s meeting minutes for 2023-11-13 Release Management Stakeholder group.

**Application Formalization Group update:** This is a new tri-council group that doesn't yet have a name. The group is working on a charter. See details: https://docs.google.com/document/d/1OQltOi6mLCpJu2cZcRLHBaty6OVUCJO30FJ5kFz48/edit. This group is to work in parallel with the RFC process. This re-architectural work changing how apps are bundled, will not prevent apps to interact with each other. The next meeting is the week after US Thanksgiving.

**Nov. 30:** Meeting on the Entity Management work and what is next.

**Quarterly meetings with SIG convenors:** There are the written updates. To help maintain the connection to SIG to PC and SIG to SIG, the idea of quarterly reports is being considered. The first one can be mid December (the 14th). For this meeting, there would be prompts to hear what is working well, what are things that could be better, do you have outstanding questions, etc.

**PC Hygiene working group is proposing scheduling meetings at times more reasonable for those in certain time zones.**

---

**Chat**

08:29:59 From Alissa Hafele To Everyone:
Hi! Natascha had a conflict, so I’ll be taking notes today.

08:30:51 From Felix Hemme To Everyone:
Replying to “Hi! Natascha had a c...”

Thank you Alissa!

08:30:55 From Alissa Hafele To Everyone:
Reacted to “Thank you Alissa!” with

08:36:35 From Felix Hemme To Everyone:
Wow Magda, I did not know that until now.

08:36:45 From Laura Daniels To Everyone:
Reacted to “Wow Magda, I did not...” with

08:36:53 From Ros, Amanda L To Everyone:
Reacted to “Wow Magda, I did not...” with

08:37:34 From Laura Daniels To Everyone:
not seeing Magda’s screen?

08:37:40 From Lynne Fors To Everyone:
Reacted to “not seeing Magda’s s...” with

08:37:43 From Marmot User Services To Everyone:
Reacted to “not seeing Magda’s s...” with

08:37:46 From Ros, Amanda L To Everyone:
Reacted to “not seeing Magda’s s...” with

08:37:48 From Jacek Gajkiewicz MOL To Everyone:
Reacted to “not seeing Magda’s s...” with

08:43:38 From Lynne Fors To Everyone:
Reading Room feature (UXPROD-1835)

08:44:06 From Charlotte Whitt To Everyone:
Reacted to “Reading Room feature...” with

08:47:45 From Charlotte Whitt To Everyone:
That's good to hear, that the note types are fetched dynamically from Settings > Inventory

08:48:51 From Jacek Gajkiewicz MOL To Everyone:
   Reacted to "Wow Magda, I did not..." with

08:57:21 From Felix Hemme To Everyone:
   I see a potential use case for presenting the OAI logs in the Dashboard app. The user could define a widget that displays a list of jobs that have run with errors. Is this something you consider for a future release?

08:57:38 From Lynne Fors To Everyone:
   Reacted to "I see a potential us..." with

08:57:41 From Laura Daniels To Everyone:
   Reacted to "I see a potential us..." with

08:57:48 From Jennifer Eustis To Everyone:
   Reacted to "I see a potential us..." with

08:58:14 From Ros, Amanda L To Everyone:
   Reacted to "I see a potential us..." with

08:59:15 From Felix Hemme To Everyone:
   Replying to "I see a potential us..."

   I do this kind of widget for GOKb harvest jobs that have ended != success

09:05:23 From Laura Daniels To Everyone:
   I love the preview. Very helpful.

09:05:59 From Felix Hemme To Everyone:
   @scolglaz We should bring the consistency of column selection (tied to a user) to Owen's attention.

09:18:44 From Alissa Hafele To Everyone:
   Request ID is same as Harvest ID?