2023-02-14 FOLIO Implementers Meeting Notes

Date
14 Feb 2023

Recording
https://recordings.openlibraryfoundation.org/folio/implementation-group/2023-02-14T10:55/

Attendees
Alissa Hafele; Amy Mantrone; Chuck Koontz; Kara Hart (she/hers); Lynne Fors; Paul Moeller; Stephanie Kaceli, Cairn University; Tara Barnett

Recommended Resources and Pre-Reads
- LIBstick
- Spine-O-Matic
  - Option one: https://github.com/cul-it/setae-api
  - Option two: https://github.com/mtsu-walkerlib/folio-spineomatic
- For Label Printing in FOLIO proper, see UXPROD-1316 - Format and print of spine labels

Agenda
- Housekeeping
  - Since last we met...
  - Incomplete Actions
  - Future Sessions
- LABEL PRINTING IN FOLIO
  - The Options
    - LIBStick Demo (Stephanie Kaceli, Cairn): see LIBStick demo.pptx
    - Spine-O-Matic Demo? (Kara Hart, Wellesley?)
    - Custom Solution (Amy, UChicago): see UChicago Spine Labeling App.pptx
    - Templates in Word
  - Library needs, and pros and cons
- Closing
  - Our findings and (hopefully) videos will live here: Implementers' Guide To Label Printing
  - Would like it to include information that will help a library new to FOLIO compare options
  - Any actions or follow through?

Notes

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<td>7:00</td>
<td>Housekeeping</td>
<td>• Tara went to product council.</td>
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<td>• We still have outstanding tasks, but we'll look at those at a later date.</td>
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<td>• Our next meeting is “Getting OCLC records into FOLIO.” Tara reminds us that she cannot demo Connexion and requests volunteers.</td>
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| 8:30  | LIBStick Demo | - Stephanie at Cairn demos LIBStick! LIBStick is a label service by libraries, for libraries.  
- (9:42) It costs $1000 per year ($83/month) for the basic subscription in February 2023. The evaluation period is truly fair to customers.  
- (10:30) Stephanie notes that LIBStick is not a commercial vendor—they are attentive, but they are based in Israel and it is sometimes challenging to get their attention. They are also off on Fridays.  
- (11:00) To get started with LIBstick, you'll need to send your paper size for labels, as well as photos of labels. Send them lots of photos. They will also need barcode numbers to test. (11:30) You'll also need to send them FOLIO information, including a URL, an account with permissions, and tenant information. Stephanie recommends setting up a 3rd party integrations permission set.  
- (12:11) For setting up LIBstick, you will need to tell them what fields to pull from. Cairn experienced some difficulty figuring out how to pull location. In Sierra, a map was used--this was a lot of maintenance. Cairn now puts this in a prefix—it is added automatically into the item.  
- (13:20) LIBStick's support is very good.  
- (13:50) DEMO OF LIBSTICK  
  - Stephanie demos the actual LIBStick program and its features. Features mentioned include: save board, clear board, sort board, enter barcode information, editing labels, reordering labels, formatting (underlining, fonts, alignment, color, etc), permissions, design templates, adding fields, Javascript.  
- (17:50) Questions for Stephanie.  
  - Can line breaks be edited? Line breaks can be edited.  
  - (18:20) Can you send a file of barcodes? Stephanie isn't sure—could ask them.  
  - (18:49) Is the cost per institution or per user? Stephanie says that it does support multiple accounts. Cairn is small, which makes LIBstick very appealing—they needed something all in one.  
  - (19:40) Is there a limit to the number of templates? We're not sure, but it does not look like there is a limit.  
  - (20:18) Why did you choose LIBStick instead of spineOMatic? Stephanie says that spineOMatic included too much heavy lifting for staff. LIBstick saved a lot of staff time. |
| 22:00 | SpineOMatic    | - Kara demos SpineOMatic. They used the code available on the githubs FOLIO labs: https://github.com/folio-labs/folio-spineomatic. They used the tweaks by Texas A&M.  
- IT gave them a server for the files, activated PHP, and put the initial files into where the public facing pages would be. They gave Kara access so she could edit those files.  
- (23:15) Kara shows us the files. Kara had experience working with PHP before, in Omeka. There are many tweaks that need to be added. A big one is adding the effective location, so you can get the right prefixes.  
- (23:50) In general how it works is: you have SpineOMatic which is a program that you stick on to your local PC. The PHP files on the server interact with the FOLIO APIs, to get the data that it needs, and feed it to the software on your PC. The PC calls the PHP files on the server, the PHP calls FOLIO, and then sends back the data that way.  
- (24:15) DEMO OF SPINEOMATIC.  
  - The zebra label prints print one label at a time. Kara shows the formatting. The call number is partially set up in SpineOMatic, partly in PHP. We see prefixes in SpineOMatic, as well as the set-up involving APIs.  
  - (26:00) We see an actual label being generated from a barcode.  
  - (27:00) We see an additional complex sample record—a quite long one, in a test record. Kara also shows us editing the label, and clicking the button to print.  
- (27:50) Problems  
  - Upgrading to MG broke SpineOMatic, but Kara was able to fix the issue.  
  - (28:50) They also had difficulties with the curl options initially, but the slack community was able to help. A tweak also had to be made due to being in an earlier version of PHP. There was some trial and error, but it works well now.  
- (29:45) SpineOMatic can be used by student workers as well—it’s not limited to staff.  
- (29:55) SpineOMatic does require a FOLIO account with permissions—they have one used for reporting with many view permissions.  
- (30:30) Questions  
  - Can you scan barcodes and then batch print to a sheet of labels? Wellesley has not used it this way. There is a batch print option, so it looks like the answer is yes!  
  - (31:40) Is anyone thinking of porting this or making an equivalent that works directly with FOLIO? EBSCO wants to provide this for their users, but Wellesley didn’t push the issue—perhaps some pressure would get this moving.  
- (32:20) We see a cool feature of SpineOMatic—you can add labels to a batch and it will spit them all out.  
- (32:50) Tara notes that a novice user might see what's on our screen and be intimidated by the PHP, but that most day-to-day users won’t ever have to see that code.  
- (33:00) Kara says that she was able to get the year and caption out—there's more information on the github site. Kara offers to help if needed! |
| 35:00 | Brief Interlude| - Technical difficulties—why the bleep does Keynote even exist except to be difficult. |
| 35:50 | Custom Solution: UChicago | • Amy is at the University of Chicago library. Chicago created their own spine labeling app about a decade ago when migrating from Horizon to OLE. It was modified for FOLIO. Amy worked with Jon Miller to design it—she's not sure if alternatives were investigated.  
• (36:40) The focus was on making something as simple and easy as possible for staff. The solution is browser based—it's designed for sending single labels to a Zebra printer.  
• (37:00) Chicago has many apps that work with FOLIO. Users access the label printing app by going to a certain URL, and accessing it in a menu. The user is then taken to a screen where they can enter the barcode. This brings up a text block formatted to the rules used at UChicago for call numbers. The text can be edited if needed. There are default formatting options, but they can be changed as desired. It also includes keyboard shortcuts!  
• (38:42) We see what it looks like when printing—this is a little deceptive and requires staff knowledge.  
• (39:11) We see the settings screen. Any particular collection can be assigned a setting which will be used for defaults. Various groups have specific preferences. It is easy to make changes and set up something new.  
• (40:00) Pros and Cons: On the positive side, the app is totally custom and so it's easy to use. On the negative, everything is coded in, so users have to ask for help to make changes to how call numbers are parsed. Additionally, it's not easy to print sheets of labels—this requires cutting and pasting into a template.  
• (41:10) Amy notes that if she were designing it now, she would request more customization features for parsing. This solution is very specific to Chicago—there would be quite a bit of work under the hood to make it work for someone else. |
| 42:20 | Final Label Printing Thoughts | • Tara reminds us of the unspoken 4th option—doing this by hand, copying and pasting into templates. Additionally, there is a Jira issue for this functionality in FOLIO.  
• Kara says that it's really important that this gets built into FOLIO. Spine labels are crucial functionality.  
• (43:50) Another question for Kara: how long did it take to launch SpineOMatic, and how much time to maintain at updates?  
  ◦ Kara says that the MG update caused issues, but other than that, no updates so far. The initial set up was quick—perhaps a day or two. Others disagree—it may take a bit longer.  
• (45:00) There is a suggestion that the group could advocate for SpineOMatic to be reconfigured for FOLIO. The project could retool this to work with FOLIO.  
• (46:40) Tara shows the Implementers' Guide to Label Printing. She asks if there's any wisdom we could pass on. Alissa says just having the data in one place is really helpful. |

**Action Items**

- It was suggested that the group should advocate for SpineOMatic to be configured for FOLIO. How exactly should we do this? What is the best venue to talk this out?
- Tara Barnett will finish the Implementers' Guide To Label Printing