Date
03 Aug 2023

Attendees

<table>
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<tr>
<th>Present?</th>
<th>Name</th>
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<td>Arthur Aguilera</td>
<td>University of Colorado, Boulder</td>
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<td>Eliana Lima</td>
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<td>Sharon Beltaine</td>
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<td>Erinn Block</td>
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<td>Nancy Bolduc</td>
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<td>Shannon Burke</td>
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<td>Elena O'Malley</td>
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<td>Dung-Lan Chen</td>
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<td>Marmot</td>
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<td>Kimberly Pamplin</td>
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<td>Jamie Jesanis</td>
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<td>Kevin Walker</td>
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<td>Alexander Lao</td>
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<td>Angela Zoss</td>
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Discussion Items

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<tr>
<th>Item</th>
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<th>Notes</th>
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<tr>
<td>Attendance &amp; Notes</td>
<td>Sharon</td>
<td><strong>Attendance &amp; Notes</strong></td>
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<td>* Today’s attendance-taker: Linda (or substitute)</td>
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<td>* Today’s note-takers: Team Leads for project updates</td>
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<td>* New Product Council Liaison: Jennifer Eustis</td>
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<td>◦ PC Home: FOLIO Product Council</td>
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<td>◦ Last PC Meeting (7/13/2023): 2023-07-13 Product Council Meeting Notes</td>
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Be on the lookout for a new Outlook calendar invitation

- Angela will have to end the previous series
- Will send invitations for the new series to people listed on our Reporting SIG Home page
- Please add your name by August 11, we will do the switch sometime the following week

WOLFcon 2023 Update

- Schedule is available at WOLFcon 2023 Sched
- There are several LDP / Metadb sessions, as well as a few others hosted by Reporting SIG
- Virtual attendance is free! consider registering!
- Conference takes place in Chicago, August 22-24
- Information and registration: https://openlibraryfoundation.org/about/wolfcon/upcoming/

Upcoming meeting topics (tentative)

- August 14 (M): Behind the scenes of the FOLIO Schema parser
- August 17 (Th): Angela with OpenRefine (calling Snapshot API)
- August 28 (M): Report from WOLFcon

Any new members?

- Welcome/introductions

How to find our latest recordings

- Recording details available on our Reporting SIG Meetings and Notes page and Query Development Meetings page

SIG Recruitment

We will need to be recruiting for a variety of roles in the coming months. Please consider whether you would be interested. Reach out to Angela Zoss or Sharon Beltaine with any questions.

- Representative for the Documentation Working Group
- Query developers
- Members of the FOLIO Analytics Review Board (immediate need!)
- Members and possibly a leader for monthly MM/RA/UM development subteam
A note for FOLIO users: I am sharing new recommendations for creating SQL-based reports in Metadb. The method is documented at https://metadb.dev/doc/#_creating_reports and there is now a sample report at https://github.com/folio-org/folio-analytics/blob/main/reports/count_loans_and_renewals/count_loans_and_renewals.sql which is adapted from the loans_and_renewals_counts LDP report. Other methods of creating reports also can be used, but Metadb is planned to support this particular form, for instance to automate making reports available to users. I hope this will be useful for the community. Feel free to let me know if you have questions.

Recurring Items (Updated weekly, but not always discussed in meeting)

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| Review of In-Progress Projects (Recurring)                          |                                                                    | • Build a directory of extracted and derived tables  
• Build Metadb query cookbook-style documentation  
  ◦ has been opened and sent to the development teams for planning/prioritization  
  ◦ haven't settled on a style exactly, but have some examples  
• Build Training Program for FOLIO Data Model  
  ◦ ACQ/ERM drafts have been presented and will be updated  
• Port LDP1 derived tables to Metadb  
  ◦ possibly done??  
• Recruit from new institutions not represented  
  ◦ recommend that the development teams reach out to SIGs for an update, invite new members |
| Review the release notes for FOLIO Analytics, LDP1, LDLite, LDP Reporting App, Idpmarc, Metadb Projects (Recurring) |                                                                    | • LDP1 release notes  
• Metadb release notes (via tags)  
• LDLite release notes (via tags)  
• Idpmarc release notes  
• LDP Reporting App release notes (mod-ldp, ui-ldp) and JIRA issues (mod-ldp, ui-ldp)  
• FOLIO Analytics release notes |
| Updates and Query Demonstrations from Various Reporting Related Groups and Efforts Projects (Recurring) | Community & Coordination, Reporting Subgroup Leads |                                                                                     |
Project updates

Reporting development is using small subgroups to address priorities and complete work on report queries. Each week, these groups will share reports/queries with the Reporting SIG. Reporting development team leads are encouraged to enter a summary of their work group activities below.

RA/UM Working Group

- Meetings have become more of a lab session, working through specific problems
- Contact Angela if you would like to join these meetings; second Tuesdays at 1pm Eastern
- Context
  - Meeting notes: https://docs.google.com/document/d/1UnzG64t917LOH2fWhCEPISOsnJWKL-Oeu88Ouo1DU/edit
  - Current status of RA/UM issues: https://github.com/folio-org/folio-analytics/issues?q=is%3Aissue+is%3Aopen+RA%2FUM
  - Status of LDP1 Metadb querying porting: https://docs.google.com/spreadsheets/d/1efLc6QMJyGuXyQM26pZbt1B6wFhJuZt7s7FJbhdxYo/edit#gid=0

MM Working Group

- We are now holding joint meetings with RA/UM. Our recurring meeting time has changed to the 2nd Tuesday from 1-2pm ET.
  - Zoom URL: https://duke.zoom.us/j/92324148267?pwd=V3lCSGJBSm5mYm4xamVFNFJqOGhzZz09
  - Meeting ID: 923 2414 8267
  - Passcode: 358968

ERM Working Group

- Current topic
  - Reporting for the FOLIO App Open Access
- Meetings are bi-weekly on Tuesdays 11am ET alternating with ACQ Working Group
  - Next meeting will be at 15th, Aug
  - Contact Stefan Dombek if you would like to get a calendar invitation

ACQ Working Group

- group is working with ERM group on ACQ-ERM FOLIO Data Model Training
- group is working on ACQ-related (Acquisitions) derived tables for the next Folio-Analytics release
  - see ACQ Derived Tables to Convert from LDP1 to Metadb
- for latest query development updates, see RM Prototype and Query Development Status
- Meetings are biweekly on Tuesdays 11am-noon ET; contact Sharon Beltaine if you would like a calendar invitation
- Meeting Recordings are here: FOLIO ERM-RM Report Dev Teams

Reporting SIG Documentation Subgroup

- Morning Glory documentation is live on https://docs.folio.org/docs/
- Nolana documentation is in review
- Orchid documentation will be in progress soon, and plans are underway to include beta-level documentation for Metadb
- Additional Context
  - The Reporting SIG has representation on the Documentation Working Group, which is building end-user documentation for https://docs.folio.org/docs/ (mostly linking to existing documentation over on GitHub)

External Statistics Working Group
• no updates currently
• new organizational/tracking scheme for JIRA, with pointers to queries in folio-analytics repository

• New organizational structure for External Statistics reports
  ◦ external statistics reports (e.g., ACRL) typically require running queries from different functional reporting areas
  ◦ these reports will be captured in JIRA under one UXPROD-XXXX report cluster issue, then the descriptions will point to each of the queries required to run them on the folio-analytics repository
  ◦ institutions will need to rank each of these 8 new UXPROD-XXXX report cluster issues
  ◦ each reporting development team will take responsibility for the queries in their area for the external statistics clusters

D-A-CH Working Group (D-Reporting)

• Ongoing topics
  ◦ Onboarding training
  ◦ DBS statistics
    ▪ JIRA-Issues, Rpt-Clusters
    ▪ Gap analysis to statistic codes, user counts etc.
    ▪ Identifying functions that we need for statistics in Germany but are not yet implemented in FOLIO

• Meetings
  ◦ Next meeting will be at 14th, Aug (1 pm, CEST)
  ◦ Contact Stefan Dombek if you would like to get a calendar invitation

Product Council

• (December 8 meeting) PC shared a report of the SIG check-ins
• would love for PC to check-in yearly

For all recent work on FOLIO Reporting SQL development:

• https://github.com/folio-org/folio-analytics/commits/main