

2019-09-18 User Management Meeting notes

Meeting URL

<https://zoom.us/j/488543197>

Date

18 Sep 2019

Attendees

- [Erin Nettifee](#)
- [Patty Wanninger](#)
- [Stefanie Sußmann](#)
- [Uschi Klute](#)
- [Jana Freytag](#)
- [Philip Robinson](#)
- [Björn Muschall](#)
- someone else!?!?

Goals

- Notetaker: Uschi
- Discuss Bugfest Feedback (Steffi)
- CAP Plan Jiras (Erin)
 - <https://docs.google.com/spreadsheets/d/19j98iCQs41xIUXLJyArvcZwTKWuCMIZfIKYkCHHwdAM/edit?usp=sharing> - have you reviewed?
 - The following Jiras did not make the CAP plan. Do we need to discuss?
 -  **UXPROD-1744** - Show Users Associated with a Permission Set OPEN
 -  **UXPROD-242** - Ability to Protect Fields from Being Overwritten by User Import DRAFT
 -  **UXPROD-1790** - Additional name fields on user record (preferred name and preferred pronouns) OPEN
 -  **UXPROD-259** - Add new features to import OPEN
- Testing for User Fielded Search, and next steps (Uschi; Erin; - see [2019-09-11 Meeting notes](#) for Uschi's test results at the bottom of the page)

If we have additional time:

- Writing user stories / features for deleting user records through the GUI (Erin, Patty)
- Reviewing requirements that have been created and attached for Custom Fields ( **UXPROD-33** - Custom Fields (for User Record and as General Platform Feature): Phase 1 Backend Development IN PROGRESS) (Erin)
- Feature request for notes on records being displayed in pop-up or other contexts. (Steffi)
 - Because this involves the Check in and Check Out apps, this may end up needing to be a feature request for RA to manage.
- Needs for PIN on user records, see what Jiras are existing, talk about requirements (Björn, others?)

Notes

Bugfest Feedback

E-Mail field is required, but there is no validation (Steffi)

- Uschi: seems to be important because otherwise users may not receive their notifications.
- It's a good practice to validate
- Björn: Perhaps the tenant settings could be used to determine whether the e-mail field is mandatory or not.
- Uschi: E-mail should not be mandatory as some GBV libraries have patrons without e-mail address.

Result / Action item: Patty will create a feature to add validation to the field.

The fields *Status* and *Expiration date* are dependent on each other (Steffi)

- Set *Expiration date* to future date *Status* changes automatically to active
- Set *Expiration date* to past date *Status* changes automatically to inactive
- The meaning (resp. impact) of the field *Status* is unclear.
- We consider this a bug. The two fields should be able to be filled independently of each other.

- Result / Action item: Patty will file a bug or feature to have these actually decoupled from each other.

The field *Birth date* is not validated (Steffi)

- You can enter a date in the future.

- Result / Action item: Patty creates a JIRA issue.

Password reset (Jana)

- Björn: If no e-mail is sent, this is due to missing settings in the server configuration.

Changing the password manually (Jana)

- Proposal: manage the user data incl. password in the campus ID System. Many US universities will intend to do this. Means you don't have to store the password in FOLIO.
- The use of a password reset email and no ability to manually reset in GUI was intentional.
- Uschi: What if the library doesn't use such a system?
- Might be a solution: Change terms of use no use of library without e-mail address

- Result / Action item: Patty suggests that Theodor Tolstoy presents the Chalmers SSO solution to us at one of the next meetings. Patty will reach out to Theodor to see about scheduling a time.

Extremely strict password rules (Björn)

- It's difficult to find out which character combinations are allowed It's not userfriendly
 - Example: no two identical letters in a row
- Proposal: make the password strength configurable

- Result / Action item: Patty will file a feature to work on this.

CAP plan JIRA issues (Erin)

- Summary of the institution responses to MVP: <https://docs.google.com/spreadsheets/d/19j98iCQs41xIUxLJyArvcZwTKWuCMIZfIKYkCHHwdAM/edit?usp=sharing>
- Discussing the following Jiras which did not make the CAP plan.
 -  **UXPROD-1744** - Show Users Associated with a Permission Set OPEN
 - The UM SIG agrees that this is not important for MVP.
 -  **UXPROD-242** - Ability to Protect Fields from Being Overwritten by User Import DRAFT
 - Meaning of CAP comment is unclear. Björn: Perhaps if a field is not delivered (=empty), it will not be overwritten. Phil: But you might want to remove a field in FOLIO during import.
 - Result / Action item: Patty will ask the CAP plan group for feedback. Erin will work with Patty to write a user story for a "thin thread" v.1 of this - a flag or checkbox on record, that if checked, would cause a record to not be updated.
 -  **UXPROD-1790** - Additional name fields on user record (preferred name and preferred pronouns) OPEN
 - UXPROD-33 is important for Duke. Was put on hold when the Custom Fields were marked for MVP. But now CF are non-MVP.
 - Patty: meanwhile the CF development team was given other tasks. Notes could be used as an alternative to CF.
 - Erin: What about the National Library of Florence? They need CF for their FOLIO migration. Consensus - no need for specific reaching out, presumably they are seeing some information we are.
 -  **UXPROD-259** - Add new features to import OPEN
 - can be closed.
 - Result / Action item: Erin added a comment to the Jira since Cate Boerema was the reporter suggesting that it be closed.
- For Q1, only a few issues will be planned; the focus will be on testing, bugfixing and stabilization.
- So we did not identify any issues that needed to go back to CAP plan, other than seeking clarification on UXPROD-242 comment. Erin heard from Holly Mistlebauer after the SIG meeting that she was working on getting feedback on that comment.

User search facilities (Uschi)

- Briefly scanned notes from Uschi and her test results. Erin is hoping to do some additional testing specifically about patrons with short last names.

- Action item - Patty will write a feature about Improving Search in the Users App so that it can be ranked.

- postponed to next meeting

Open Topics

Item	Who	Notes	Discussed Today?	Resolution / Next Steps	Carry topic?

Searching by specific fields	Erin	<p>Right now Users has general keyword searching; we will want to be able to search specific fields - IDs, emails, addresses, notes?</p> <p>Perhaps one of these issues fits:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  UXPROD-1015 - Boolean Search (Within Apps) OPEN </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  UXPROD-907 - Advanced Search (Within Apps) OPEN (New feature) </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">  UXPROD-869 - Advanced Search (within apps) OPEN (Epic) </div> <div style="border: 1px solid #ccc; padding: 5px;">  UXPROD-1941 - front-end query pre-processor: support words, phrases and booleans DRAFT (new feature) </div>		<ul style="list-style-type: none"> Uschi did additional testing - see notes from 2019-09-11 Meeting notes Erin to discuss with RA SIG requirements for fielded searching Erin to investigate a searching 	Yes; this is not yet resolved.
Pop-ups on user transactions	Steffi	<p>notes may be used for communication about users, and pop-ups on user transaction (or displaying of notes) is desired. Khalilah indicated this should be raised as a new feature request.</p>		<ul style="list-style-type: none"> May need to be raised with RA SIG 	
Bulk User import	Erin	<p>Does anyone know (or can tell me) what the current, supported approach is (or will be) for bulk importing user records? I can see a github for mod-user-import, jiras for that project with comments that ask if that mod is still being supported. I can see a very old jira (https://issues.folio.org/browse/MODUSERS-3) for bulk-loading that was last updated last year. I can see a very old jira about performance improvements (https://issues.folio.org/browse/MODUIMP-4) that was last updated last</p>		<p>Patty to ask for info / updates from Ebsco staff while in Sweden next week</p>	Yes; may need additional discussion in group as we go.
Deleting User Records	Erin	<p>Discussing the need for deleting patron records (no Jira currently; need for one discussed in comments of https://issues.folio.org/browse/UIU-1079)</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  UXPROD-291 - GDPR Right of Erasure OPEN </div>		<ul style="list-style-type: none"> User Stories need to be written 	Yes
Custom Fields	Uschi	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">  UXPROD-33 - Custom Fields (for User Record and as General Platform Feature): Phase 1 Backend Development IN PROGRESS </div> <p>the tag <i>cap-mvp</i> has been removed - reason? Further activities?</p>		<p>The tag was removed, and this was dropped from the MVP due to capacity (discussed at RA SIG meeting)</p> <p>We can and probably should review the requirements that Khalilah has generated; they are attached to the master Jira.</p>	Yes
Discussion on PIN needs for user records	Bjorn, others?	<p>Important to discuss - Because the entry of an account password (e.g. university login) in a public space, e.g. self-checkout is not very protective. The input, especially in vertically hanging touch screen monitors, is not protected from the view of others behind me. Also, if I feel someone has been watching me, I can simply change my PIN without having to change my account (university) password. This provides extra security. The principle should be the same as with a bank card, where the account password and card PIN are different. We'd all be surprised if it wasn't that way with our bank, I think. Leipzig does not need this urgently, because we need at least another 2 years for go-live. But in the long run all Saxon libraries need this.</p>			
Multiple Patron Identifiers		<p>Additional patron identifiers will not be in the MVP(?). Conversation turns to custom fields and wondering if they are searchable. Will custom fields work for multiple user identifiers?</p> <p>Patty & Erin will work on users stories for:</p> <ul style="list-style-type: none"> Repeatable ID Field which must be 'nameable' 		<p>User stories have been written. We can probably drop this from our list of ongoing topics.</p>	No
Other		<p>Patty will work on stories for:</p> <ul style="list-style-type: none"> the department field preferred name/preferred pronouns 			