

# 2019-05-20 Reporting SIG Meeting notes

## Date

20 May 2019

## Attendees

Present?	Name	Organization	Present?	Name	Organization
X	Sharon Beltaine	Cornell University		Sara Colglazier	Mount Holyoke College/Five Colleges
	Elizabeth Berney	Duke University		Erin Nettifee	Duke University
	Joyce Chapman	Duke University		Karen Newbery	Duke University
	Elizabeth Edwards	University of Chicago		Tod Olson	University of Chicago
	Claudius Herkt-Januschek	SUB Hamburg	X	Scott Perry	University of Chicago
	Doreen Herold	Lehigh University		Stefan Stadtherr	MPIL Heidelberg
X	Anne L. Highsmith	Texas A&M	X	Simona Tabacaru	Texas A&M
	Harry Kaplanian	EBSCO	X	Kevin Walker	The University of Alabama
X	Ingolf Kuss	hbz		Charlotte Whitt	Index Data
	Lina Lakhia	SOAS		Michael Winkler	OLE
X	Joanne Leary	Cornell University		Uschi Klute	GBV
X	Michael Patrick	The University of Alabama	X	Vandana Shah	Cornell University
	Nassib Nassar	Index Data	X	Angela Zoss	Duke University
X	Veit Köppen	University Magdeburg		Lisa DeCarolis	Smith College/Five Colleges
X	Linda Miller	Cornell University	X	Elena O'Malley	Emerson
	Gavin	China		Holly Mistlebauer	Cornell University

## Discussion Items

Item	Who	Notes
Attendance	Sharon	<p>Today's Attendance Taker: Anne Highsmith</p> <p>Today's notetaker: Kevin Walker</p> <p>Last week's notetaker: Kevin Walker</p>
Updates on Reporting SIG Meeting Schedule	Sharon	<p>Please note that we will hold a Reporting SIG meeting on Monday, June 17 from 9-10am EDT, coming to you "live from the FOLIO conference" in DC.</p> <p>Due to the observance of Memorial Day on Monday, May 27 in the United States, the Reporting SIG and Report Prototype Working Group meetings are both cancelled.</p>
Data Privacy for FOLIO Reporting	ALL	<p>Joyce Chapman, Ingolf Kuss, and Vandana Shah will take on the task of assembling recommendations on Data Privacy for the LDP Data Warehouse as the members of the new Data Privacy Working Group.</p> <ul style="list-style-type: none"> <li>• Did Lisa DeCarolis find additional volunteers within the Five Colleges?</li> </ul> <p><u>Notes:</u></p> <ul style="list-style-type: none"> <li>▪ Meeting to take place on Tuesday at 10am EDT</li> </ul>

Report Prioritization for Development in Data Warehouse	ALL	<p>Note: In order to get more information on the state of development in Resource Management, Sharon has asked Dennis Bridges to attend one of our upcoming Reporting SIG meetings.</p> <p>We will review the <a href="#">RPWG Project List</a> for the Report Prototype Working Group with updates from those who are working on each of the current report prototypes in progress. Please provide feedback on the prioritization of these projects as a representative of your institution.</p> <ul style="list-style-type: none"> <li>• <a href="#">Loan and Renewal Count</a> - Kevin <ul style="list-style-type: none"> <li>• Combines ID406 and ID407</li> <li>• Uses unique loan id, which is associated with a loan date</li> <li>• Renewal count falls under each Loan ID, but is not associated yet in FOLIO with specific dates (this is a problem)</li> <li>• We need to have dates in order to track circulating items</li> <li>• (Joanne) What happens if the item is deleted? Answer - LDP keeps historical information, so you will be able to report on it</li> <li>• Hierarchy of locations (institution/campus/library) has been included</li> <li>• (Joanne) loan type would tell you item is on reserve; reserve will probably show up as the effective location <ul style="list-style-type: none"> <li>• Temporary location will be added to the prototype</li> </ul> </li> <li>• (Linda) how do we include ILL and Borrow Direct data in this report? <ul style="list-style-type: none"> <li>• ILL is typically delineated by either location or patron group</li> <li>• Patron group will be added to the prototype</li> </ul> </li> <li>• Need to ask Nassib if all location elements should be</li> <li>• Sharon to set up meeting with Emma Boettcher, Andrea, Angela, Kevin, and Joanne to discuss need for <b>renewal date</b> data elements, which impacts several reports</li> </ul> </li> <li>• <a href="#">External Statistics</a> - Ingolf, Linda, Scott, Veit, Sharon <ul style="list-style-type: none"> <li>• Data divided across: digital vs. non-digital and serial vs. non-serial</li> <li>• Will begin with ACRL requirements and then shift to cover ARL and NCES reports</li> <li>• Should all survey elements be included in this prototype? <ul style="list-style-type: none"> <li>• May want to separate sections (e.g., circulation, holdings, financial, etc.)</li> </ul> </li> <li>• Questions remain, regarding access to MARC fields for report articulation (e.g., differentiating between serials/monographs)</li> </ul> </li> <li>• <a href="#">Services Usage</a> - Angela <ul style="list-style-type: none"> <li>• Looks at the relative activity levels across different service points</li> <li>• Service point name vs. display name vs. code <ul style="list-style-type: none"> <li>• Angela will add the service point code to the model</li> </ul> </li> </ul> </li> <li>• <a href="#">Shelf List Location</a> - Eric <ul style="list-style-type: none"> <li>• Discussion for this prototype will be saved for next meeting (June 3)</li> </ul> </li> </ul>
Additional Topics?	All	No additional topics
Topics for Future Meetings	All	Review and update <a href="#">Topics for Future Reporting SIG Meetings</a>

## Action items

- [Sharon Beltaine](#) will meet with Ann-Marie Breaux on Import-Export reports and bring notes back to Reporting SIG
- [Sharon Beltaine](#) to review ARES-related Resource Access reports with real-time data requirements with Darcy Branchini and bring notes back to Reporting SIG
- [Sharon Beltaine](#) will update the Reporting Functionality ID numbering system