2019-09-16 Reporting SIG Meeting notes

Date

16 Sep 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
x	Claudius Herkt-Januschek	SUB Hamburg	x	Scott Perry	University of Chicago
x	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	x	Andi Bihler	Munich Technical University Library
	Joanne Leary	Cornell University		Uschi Klute	GBV
x	Michael Patrick	The University of Alabama	x	Vandana Shah	Cornell University
x	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
	Matt Harrington	Duke University		Holly Mistlebauer	Cornell University

Discussion Items

Item	Who	Notes
Attendance	Sharon	Today's Attendance Taker: Linda Miller Today's notetaker: Vandana Shah Last week's notetaker: Sharon Beltaine
Updates from Various Reporting Related Groups and Efforts	Various	The Reporting SIG is using small work groups to address priorities and complete our work. Each week, we will provide updates to the Reporting SIG from these various reporting-related groups and efforts: - Community and coordination: We need new data analysts to write queries or prototype reports. - LDP Report Working Group: New data analysts are needed for query writing and prototyping, Sharon reached out to Product Council in case anyone from PC is interested. - Kevin completed a prototype for ACRL, Scott had great suggestions for the financial piece. Angela's SQL queries opened a discussion about how others in the group can get comfortable writing queries, and a meeting has been scheduled with those who are interested in writing more in-depth queries. - LDP Data Privacy Working Group: Ingolf is trying to get a person from an independent data privacy center to join the group, who can help answer several questions authoritatively about data privacy, and can provide Nassib with information needed to make a design proposal that will be valid for all libraries, European as well as US. - LDP SysOps Working Group: No new developments - Software development: Nassib has added effective location to the FOLIO code; it will be available in the new release. Effective location as calculated at time of checkout. Also, anonymization of personal data, based on initial suggestions from Data Privacy Group. So by default, now the LDP loader anonymizes fields from the user data. It is complex to anonymize user ID, as it is often used as a foreign or primary key. Work on getting query development up and running. New test data are being loaded (static test data) to complement data that come from FOLIO snapshot. Also, development of report queries are critical, do we have development resources that can help with developing queries? - Others?

| Request for More Data Analysts on the RPWG | Sharon | The Report Prototype Working Group is hard at work building report prototypes and queries to support FOLIO participants reporting requirements. We need more data analysts to join this group to get our reports done on time for upcoming Go Lives. Let's discuss possibilities in more detail.

This is an opportunity for people to develop skills (SQL), as these skills will be needed in the future too. Are there additional resources (people from other institutions who can join us) for query writing? A lot of institutions are represented here, we are in a work crunch, and need more resources from other institutions. Linda would like to see report clusters to get a better idea of what's needed in report prototyping and query writing.

Nassib noted that the test database was set up a while ago, would the analysts like to start working with that? Do people recognize how they will interact with the reporting system, can we experiment with that?

Sharon: At Cornell, a small group will take the query templates and edit them for Cornell's needs, will learn core SQL needed, and will learn to write queries from scratch, so that when we go live, we can report out as needed. How are others structuring this? *Angela:* Duke is looking for others interested in SQL development, hope to have something by go-live that's an easier interface. *Kevin:* his institution is working on this, to see which tools will work best for their reporting purposes.

Nassib: Microsoft Access is currently not too compatible with PostgreSQL, it needs more testing with the newest version of Access. Also, the newer version of PostgreSQL (upcoming) may also be compatible with Access. Nassib has requested Index Data dev ops people to test a public version of the LDP, and they may be able to address the issue of Access incompatibility. More deeply nested attributes in the JSON data will be not be available through Access's visual query builder. For now, this is the best we can do, and if lots of queries are using the nested data, the columns can be generated by individual institutions from the FOLIO data table.

Kevin: Can everyone from this group commit to writing at least one query? That's very important right now. |
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| SQL Training Resources for LDP Query Development | Nassib, Angela, Kevin, Sharon | A number of training tools and resources have been identified to jump start data analysts who can join the RPWG report prototype and query building efforts. We'll review these during our meeting. Nassib shared some resources from Stanford which are an excellent source for a conceptual background. Vandana suggested a resource for hands-on SQL training.Please add to the training resources page, if you have any resources in mind. |
| Review of Non-Clustered RA Reports | Angela | Angela will walk us through a review of Resource Access reports that did not fit into a cluster category.

See the list at

https://docs.google.com/spreadsheets/d/1mS6nuvUhdxwzj3xXFOPjlc4iiV5xhH4n05a5ZloZb5g/edit#gid=0

RA clusters have been uploaded to the Google drive. Next step was to create UXPROD issues in JIRA to represent each cluster. Each issue shows the reports included in each cluster, sorted by cluster labels. The po-mvp labels indicate that at least one inquisition needs this at go-live. Good news is that only half of the clusters in RA are needed at go-live. This will help with prioritization. Originally 100 reports had been added to the RA master sheet. Only 50 reports were clustered, as the remaining did not fit into any RA clusters. For example, reports on batch jobs - these could be moved elsewhere. Also some need to be pushed back into in-app. |
| Additional Topics? | All | |
| Topics for Future Meetings | All | Review and update Topics for Future Reporting SIG Meetings |

Action items

- [ ] Reporting Data Privacy to follow up with Jesse, Tod, and Cate, and Chair-Elect to determine approach to audit trails in LDP
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