

# 2019-09-12 Metadata Management Meeting notes

Date

12 Sep 2019

## Attendees

please put an 'x' next to your name in the list below the "Discussion items" if you are attending. Thanks!

## Discussion items

Product Council Update	<a href="#">Dracine Hodges</a> / <a href="#">Laura Wright</a>	<p><a href="#">Individual Apps: Information, Tips, and Tricks</a></p> <p>We can all add to this documentation and will be encouraged to. Template on main page. Expect a general announcement from PC soon. This will possibly be helpful for the documentation technical writer in future, but can also be helpful for the community now. Some concerns expressed around consistency and divergent styles if this is crowd-sourced.</p> <p>Capacity Planning, Summary of Institutions Responses to MVP Recommendation, Cap Planning Responses, Changes to MVP, etc: <a href="https://docs.google.com/spreadsheets/d/19j98iCQs41xIUxLJyArvcZwTKWuCMIZfIKYkCHHwdAM/edit#gid=1273956550">https://docs.google.com/spreadsheets/d/19j98iCQs41xIUxLJyArvcZwTKWuCMIZfIKYkCHHwdAM/edit#gid=1273956550</a></p> <p>Capacity Planning Team is willing to meet with SIGs next week to discuss any non-mvp issues we feel strongly about. Laura will not be here next week: anyone available/willing to lead a discussion with Cap Planning? What issues?</p> <p>Update: This was the monthly PC meeting that included SIG conveners. Karen Newbury, convener of SIG leaders group talked at the meeting. She wanted to encourage people use pages to record notes/best practices/"how to" A technical editor is still going to be hired. The implementation SIG wanted to start gathering this information.</p> <p>Laura - Not sure if they wanted people to contribute immediately. Laura suggested waiting a few days. Dracine said Peter and/or Karen will contact us when they are ready for us to contribute.</p> <p>Dracine - SIGs gave updates. Reporting SIGs are asking for help from institutions from people who can write queries. Resource Management had a demo from Chalmers at their last ERM meeting. Looked at ERM packages. Resource Access - Looking at display issues related to bound-with. User Management SIG has created backlog of what they need to discuss.</p> <p>Discussion of MVP - updates. See spreadsheet linked above. There are 4 tabs.</p> <p>Laura - Starting in January, project will shift as people start to implement. Kristin Martin recommended we discuss this at WolfCon.</p>
Subgroup Updates and Other Updates		<p><b>Export working group:</b> Scope of export will be limited to Inventory and Source Record Storage only. Talked about how libraries identify records that they want to export. Group is meeting today, 2:00pm E.S.T. Export will include bibliographic, holdings, items, not authority at this point.</p> <p>In the future Export will include MarcCat. Ann-Marie said we need to consider if there is something to be gained from MarcCat export, vs. export directly from the SRS. May or may not be a need. (Administrative data?)</p>
Data Import Mapping updates	<a href="#">Ann-Marie Breaux</a>	<p>Data import demoed at Sprint Review updates that have been made in MARC to Instance map. Developed mappings were initially developed some months ago. After testing, 15 or so updates were identified. They are mostly fixed in this update.</p> <p>Changes are listed in spreadsheet. Ann-Marie demonstrated the changes in FOLIO.</p>
Feature ranking /new features?		

Inventory UI	Charlotte Whitt	<p>Display of empty elements: display all elements, empty values display as "-" vs display only elements that are populated? consistency across FOLIO? see:</p> <div data-bbox="342 323 1224 365" style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <span style="color: red;">■</span> <b>UJIN-713</b> - Fix UX consistency issue. Instance. Empty data element populate a dash <span style="float: right; border: 1px solid #ccc; padding: 0 5px;">CLOSED</span> </div> <div data-bbox="342 394 1224 436" style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <span style="color: red;">■</span> <b>UJIN-714</b> - Fix UX consistency issue. Holdings. Empty data element populate a dash <span style="float: right; border: 1px solid #ccc; padding: 0 5px;">CLOSED</span> </div> <div data-bbox="342 466 1187 508" style="border: 1px solid #ccc; padding: 2px;"> <span style="color: red;">■</span> <b>UJIN-715</b> - Fix UX consistency issue. Item. Empty data element populate a dash <span style="float: right; border: 1px solid #ccc; padding: 0 5px;">CLOSED</span> </div> <p>Charlotte feedback: If there is no value, should FOLIO insert a dash, or should the element be simply un-populated. Laura - like dash - helpful. Mary Alexander would prefer a blank field. Jacquie - How does this reflect reporting? Charlotte - this will have no implication for reporting. Jacquie - having a character is OK, but respect other's opinions. Charlotte - when there is no data, should the element label even be displayed at all?</p> <p>Either - no data, don't show label, or do show label, but do have a dash to represent a blank field. (Charlotte)</p> <p>Christie - Noted that there are a lot of empty fields on records in Chicago's working version. This causes confusion when looking for information. The screen does still "jump" around due to different lengths of values. Christie and Jen both spoke for having more UX import in the Inventory/ Instance record.</p> <p>Charlotte suggested having collapsed accordions set at the institutional level.</p> <p>Group expressed the desire to be able view the Inventory record in full screen. Tiziana expressed the desire to have this functionality in MarcCat as well.</p>
Custom Fields (if time allows)	Laura Wright	<p>Being developed for Users. Could be added to Inventory in future. Khailah's slide deck: <a href="https://docs.google.com/presentation/d/1zXvDSw-zJ36dKWv1C-W3-x8yOmKNu01c3LV0prJh1F8/edit#slide=id.p">https://docs.google.com/presentation/d/1zXvDSw-zJ36dKWv1C-W3-x8yOmKNu01c3LV0prJh1F8/edit#slide=id.p</a></p> <div data-bbox="342 1125 1484 1192" style="border: 1px solid #ccc; padding: 2px;"> <span style="color: orange;">■</span> <b>UXPROD-33</b> - Custom Fields (for User Record and as General Platform Feature): Phase 1 Backend Development <span style="float: right; border: 1px solid #ccc; padding: 0 5px;">IN REVIEW</span> </div>
Future meeting topics		<p>Source of truth (SRS). Review the FOLIO metadata flow based on test of the newly implementation of edit freeze of records in Inventory when having only SRS and Inventory installed.</p> <p>Inventory, MARCcat, Data Import Permissions interaction review</p> <p>Search enhancements - possible also look at more general requirements for defining search, e.g. when to use: Phrase search, Truncating (left and/or right), Stemming, Nested search, Boolean search, etc. (TC and MM task)</p> <p>Authority Data and Inventory Vision (small group work first)</p> <p>Discovery – need to clarify sources of data for discovery vs. data needed for operations; this needs to be documented for the entire FOLIO community and direction should come from Product Council</p> <p>Item record statuses and the apps that affect them</p> <p>Music / Maps / Media cataloging review of data elements in Inventory</p> <p>Felix (via chat) "@charlotte: I could ask a colleague (from one of the 180 network libraries) if she/he could review the beta elements from a 'musical' point of view."</p> <p>Texas A&amp;M may have a music cataloger that can help.</p> <p>Christie offered to load cartographic and music data from other libraries into their test FOLIO instance.</p> <p>Jennifer (via chat): We should also look at video as well. Videos have other standard numbers EAN for instance and fields that people like to search and discovery them by</p> <p><a href="https://wiki.folio.org/pages/viewpage.action?pageId=78336464">https://wiki.folio.org/pages/viewpage.action?pageId=78336464</a></p>

present?	Name	Organization
----------	------	--------------

x	Aaron Trehub	Auburn
	Alice Krim	
x	Ann-Marie Breaux	EBSCO
	Ann Kardos	UMass Amherst
	<a href="#">Charlotte Whitt</a>	Index Data
x	Christie Thomas	Chicago
	Colin Van Alstine	Smith (FC)
	Damian Biagi	
	Dennis Bridges	Stacks
	Dennis Christman	Duke University
	Dracine Hodges	Duke University
	Felix Hemme	ZBW
	Filip Jakobsen	
	Jacque Samples	Duke University
	Jason Kovari	Cornell
	Jenn Colt	Cornell
x	Jennifer Eustis	UMass Amherst
	Jessica Janecki	Duke University
	Kristen Wilson	Index Data
x	Laura Wright	Cornell
	Lisa Furubotten	Texas A&M
x	Lisa McColl	Lehigh University
	Lisa Sjögren	Chalmers
	Lynn Whittenberger	
x	Magda Zacharska	EBSCO
	Martina Schildt	VZG
x	Mary Alexander	Univ. of Alabama
	Nancy Lorimer	Stanford
x	Natascha Owens	Chicago
	Niels Erik Nielsen	
	Patty Wanninger	EBSCO
X	Rita Albrecht	HeBIS-Verbundzentrale
x	Sara Colglazier	MHC/5C
	Sarah Schmidt	Duke University
x	Tiziana Possemato	
	Theodor Tolstoy	EBSCO
	Wayne Schneider	Index Data