

2018-06-07 Metadata Management Meeting Notes

Date

07 Jun 2018

Attendees

- Lynn Whittenberger
- Lisa McColl
- Anne L. Highsmith
- Kimie OuYang
- Charlotte Whitt
- Christie Thomas
- Damian Biagi
- Dracine Hodges
- Dennis Christman
- Jacquie Samples
- Filip Jakobsen
- Laura Wright
- Lisa Furubotten
- Mary S Alexander
- Michael Knarr
- Natascha Owens
- Patty Wanninger
- Stephanie Espiand

Goals

Discussion items

Item	Who	Notes
Product Council update	Dracine Hodges	<ul style="list-style-type: none">• Database Warehouse needs to be developed simultaneously with v.1.• Technical Council will be approved, most likely.
Subgroup updates		<ul style="list-style-type: none">• Local Package Record Subgroup<ul style="list-style-type: none">• Laura report - 1st meeting a few days ago. They came up with a variety of use cases. Hoping to have final set of proposed use cases tomorrow, and a working definition. They will meet with ERM to make sure there is not overlap• MARCcat Subgroup<ul style="list-style-type: none">• Charlotte - We will have first meeting next week. The subgroup has been established. Almost ready to start. Tiziano will provide demos of existing WeCat modules.• Batch Loader Subgroup<ul style="list-style-type: none">• Gary Branch from Cornell demonstrated Voyager• Tiziano demonstrated WeCat module today.• Inventory Data Dictionary Subgroup started today. The group consists of Christie and Jacquie.
"Change Tracker App"	Stephanie	<p>https://discuss.folio.org/t/change-tracker-app-ux-iteration-1/1838</p> <p>This app will track changes that anyone makes to the data, and give a space to explain why a change was made. Filip will work with Batch Import group.</p> <p>The Change Tracker App will work automatically.</p> <p>The concept of an "undo" or rollback in the change tracker will be welcome.</p>

<p>Item UX /UI</p> <p>Filter display</p>	<p>Charlotte Whitt, Kimie OuYang, Filip Jakobsen</p>	<p>Presentation of the latest update of the item record</p> <p>Kimie demonstrated the changes to the item record based on meetings with group members.</p> <p>Feedback: Concern about holdings level notes living on item level. It might be useful to view holdings notes at the item level, however clarity is needed. We also need a place public and non-public notes in the item record for a note that is not inherited - a note that only applies to the item level. Example: "Signed by offer" - this is a characteristic of a particular item.</p> <p>We need a specific note that applies to items, that are not inherited from holdings. We need a Public Item Note and a Non Public Item Note.</p> <p>Filip will post a discuss forum to present the various terms for "notes" (i.e. notes, comments, action notes, etc.) and the need for standard terms used across FOLIO.</p> <p>Kimie changed the interface to clarify. She added an "Action note" to the item notes.</p> <p>The presence of note types be configurable. A custom fields discussion/demo is available on the Discuss Forum by Stephanie.</p> <p>Filip will present wireframe options for display of filters, with categorized terms, e.g. Resource type, Format, Material type, and subject headings</p> <p>Three options:</p> <p>Option A: (Accompanying) Video cassette, accompanying</p> <p>Option B: Video cassette, accompanying (Accompanying)</p> <p>Option C:</p> <p>Accompanying</p> <p>Video cassette, accompanying Video cassette, accompanying Video cassette, accompanying</p> <p>There is a Discuss post about this. Please respond/vote by Monday, June 11.</p>
<p>MARC holdings records discussion</p>	<p><i>Discussion Postponed</i></p>	<p>Comments/Email stemming from the "Folio inventory: a working definition" document : https://docs.google.com/document/d/1ia1gnVP9gZStNzipgD1Z5-W7TzutCYVOx_icz0x9LF/edit</p> <p>From: https://docs.google.com/document/d/1b_DVh1CGaUQmFu6kMp4R44WUKMpMQ8fP5RvhaEv4eFk/edit</p> <p>2. Holdings & Item data: will it live in both Inventory storage and MARCcat or just Inventory?</p> <ul style="list-style-type: none"> ○ V1 = Inventory only ○ Post-v1 = perhaps be able to edit/synchronize via MARCcat as well; this does not need to be decided yet <p>Outstanding question</p> <p>1. Need to figure out whether MARC Holdings Storage work (now marked as v1?) can be confirmed for v1</p> <ul style="list-style-type: none"> ○ Do any of the early adopters need MARC Holdings storage? (CW: followed up with Chalmers - and they do not want to continue with MARC holdings) ○ We will ensure all elements of MARC holdings are retained in FOLIO holdings ○ If libraries need to exchange holdings info with other libraries in MARC holdings format, then we would need a way to convert FOLIO holdings into MARC upon export ○
<p>Reporting - in app</p>	<p>Charlotte Whitt</p> <p><i>Discussion Postponed</i></p>	<p>POs for the different apps are asked to collect in app requirements for Reporting needs. Holly Mistlebauer is the interim PO for the Reporting domain. In the Reporting SIGs materspread sheet is a tab for Metadata Management: https://docs.google.com/spreadsheets/d/1svUM74Dkg4KvTXLzKZK_2k_SxeukX-87NnYf8CaTrYQ/edit#gid=650240467</p>

Action items



