

2019-06-03 Reporting SIG Meeting notes

Date

03 Jun 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	X	Tod Olson	University of Chicago
	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		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
	Joanne Leary	Cornell University		Uschi Klute	GBV
X	Michael Patrick	The University of Alabama	X	Vandana Shah	Cornell University
	Nassib Nassar	Index Data		Angela Zoss	Duke University
	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
X	Ann Crowley	Cornell			
X	Veit Köppen				
X	Dennis Bridges	EBSCO	X	Eric Pennington	Texas A&M

Discussion Items

Item	Who	Notes
Attendance	Sharon	Today's Attendance Taker: Linda Miller Today's notetaker: Tod Olson Last week's notetaker: Kevin Walker
Updates on Reporting SIG Meeting Schedule	Sharon	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.

Report Prioritization for Development in Data Warehouse	Dennis Bridges , Eric Pennington	<p>We will review the RPWG Project List 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"> • Today, we will focus mainly on In App Resource Management reports. Dennis Bridges , RM Product Owner, will join us for this discussion. Need to know what JIRA feature will cover each given in app report need, and how it will cover the report. (20 reports). We need to link the in app reports to JIRA reporting issues. • Eric Pennington will discuss the Shelf List Location report data model (save for June 10 if we run out of time) <p>Notes:</p> <p>Organizations API is now stable, as are Orders. Just did a substantial adjustment to Orders and no plans to change further. Looking next at Receiving and then at Invoicing. Much of the backend work has been done on Invoicing, hoping to start front-end work on Invoicing in Sprint 65.</p> <p>What about Finance? APIs are old and dev team has identified a lot of technical debt. Currently plan to start to address that in Q3, expect APIs to change a fair bit. Fund distributions, encumbrances, transactions, any moving of money around the system, have yet to be implemented. All the stuff around funds and budgets. May possibly include additional element of fund groups. Probably not ready to look at Finances for reporting.</p> <p>Can look at vendors, orders, invoice, voucher.</p> <p>In-App reports:</p> <p>For invoices, planned features around invoices for search, filter, and sum, which should be implemented in a way that can be reused through different areas in Acquisitions and other parts of FOLIO. Could also export results. Finance App is still very undeveloped, but see much potential to apply this pattern to fund, group, and ledger.</p> <p>Dennis will write up JIRA ticket for search, filter, calculation (e.g., sum) pattern. There is already existing functionality for export to CSV: see UXPROD-1760</p> <p>SIG will go through reports and note which can be addressed by above pattern, these can become user stories. The rest are for the data warehouse.</p>
JIRA Updates		<p>Holly added a whole new set of JIRA issue filters so you can see reports by functional area. See the Reporting JIRA Issues Filters page.</p> <p>-UXPROD in app report issues now include Report IDs from the Master Spreadsheet, the functional areas, and the report contacts</p> <p>-filters have been added for each functional area</p>
Data Privacy for FOLIO Reporting	ALL	Any updates or questions from the Data Privacy Subgroup?
Additional Topics?	All	No additional topics
Topics for Future Meetings	All	Review and update Topics for Future Reporting SIG Meetings

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