

# 2017-09-21 Metadata Management Meeting Notes

## Date

21 Sep 2017

## Attendees

- [Lynn Whittenberger](#)
- [Lisa McColl](#)
- [Michael Winkler](#)
- [Chew Chiat Naun](#)
- [Dennis Christman](#)
- [Jason Kovari](#)
- [Laura Wright](#)
- [Ann-Marie Breaux](#)
- [Holly Mistlebauer](#)
- [Natascha Owens](#)
- [Joseph D. Olivarez](#)
- [Christie Thomas](#)

(Please feel free to add your name if I missed it on the participants list, especially if you are on a group call and your name is not listed individually. Thank you! — Lisa)

## Goals

## Discussion items

Time	Item	Who	Notes
	Product Council update	<a href="#">Michael Winkler</a>	Michael Winkler reported that the Product Council is focused on governance at the moment. Lynn invited members of this SIG to attend Product Council meetings and report back.
	Folio Forum Facilitators update	<a href="#">Joseph D. Olivarez</a>	<b>Event: Resource Access SIG Report</b> <b>Time: Wednesday, September 27, 2017 at 11:00AM EST / 1600 GMT</b> <b>Register: <a href="#">Here</a></b>  The Resource Access SIG (special interest group) was convened in January of 2017 with a charge of defining essential circulation functions and informing developers of the interactions needed for successful resource sharing.  Who are the SIG members? How do they proceed? What have they helped produce so far?  Come and join us for a discussion and demonstration of current development in Resource Access.  <b>Host:</b> Sharon Wiles-Young, <i>Lehigh University</i>  <b>Presenters:</b> <ul style="list-style-type: none"><li>• Debra Lamb, <i>Cornell University</i></li><li>• Cate Boerema, <i>EBSCO</i></li></ul>
	Linked Data W/G update	<a href="#">Wayne Schneider</a> <a href="#">Peter Murray</a>	Not in attendance.
	Cataloging App discussion	<a href="#">Charlotte Whitt</a> <a href="#">Lynn Whittenberger</a>	Question raised by Holly M.- is an external app to edit catalog records OK? what functions/features would be needed / desired; what encoding editors (other than MARC) might be needed? What editors are available now - what are pros/cons of those existing editors?  <b>excerpt: email from Charlotte W.:</b>  Filip and I have just begun the work fleshing out the UX design of the Inventory App, and in that connection we're fully aware, that we need to talk more in depth with the MM-SIG about what 3rd party cataloging tool to implement for FOLIO V1.  ... it would be extremely useful if we together could list different 3rd party cataloging tools, which could be possible solutions as cataloging tools to implement for V1.  I would suggest that we qualify the list with comments/notes, and write up e.g. strengths (pros), weaknesses (cons), etc., and then review the list with the MM SIG, and get feed back from the group.  <b>excerpt: email from Peter M:</b>  the design of the Codex is that edits are made in the source record and those changes flow to the Codex record. There will not be a way to edit a Codex record directly.

And to refresh everyone's memory, the FOLIO design allows for many sources of descriptive records: MARC, Dublin Core, BIBFRAME, etc. ... Each source of descriptive records will have one or more editors.

In the case of the MARC silo, the leading candidate for an editor for v1 is leveraging Terry Reese's MarcEdit application. To the best of my knowledge, there are no user stories yet for editors for Dublin Core, BIBFRAME, and others. Given the time that we have remaining for v1, creating a web-native editor for MARC is considered out of scope.

For what its worth, in the initial conversations with Terry, it seems possible and likely that MarcEdit itself will be able to communicate directly with FOLIO data storage mechanisms. For instance, within MarcEdit one could search FOLIO, retrieve a single record or a group of records, make edits, and push them directly into FOLIO without needing to go through the web browser. Hopefully this capability will remove some of the friction of not having a browser-native MARC editor.

- Lynn mentioned that Kathryn Harnish will be leaving the project. Cate Boerema from EBSCO will be taking over that work.
- Filip will give a demo next week.

#### Cataloging Editor Discussion

- Holly Mistlebauer wondered if an external app is sufficient for editing cataloging records. MarcEdit is being considered for FOLIO Version 1. She wants to make sure that everyone is comfortable working with an external editor, not a native FOLIO editor. Her understanding is that records would have to be pulled out, then the records would have to be put back in. There will not be a FOLIO MARC editor for Version 1. Holly feels it is important to find out now, instead of later. Are we OK with this?
  - Ann-Marie Breaux - Asked if she wants to fix a typo, would the record need to be exported from FOLIO, then reimported?
  - Holly - Her understanding is that you can make a change that would be reflected in the Codex
  - Jason - Thought Peter sent an email saying that the Codex is not editable
  - Mike said the scenario Ann-Marie Breaux stated is correct.
  - This did not sound good to several members.
  - Mike Winkler pointed out that there is API support in MARCEdit. He also pointed out that MARCEdit is not web-based. Does MarcEdit work on Mac and Windows?
  - Laura Wright confirmed that MarcEdit works on both Windows and Mac, but may not be fully developed for Mac users at this point. She also stated that this proposed workflow is a significantly different model from what is being done now at her university, but thought that her university could adapt. Laura wondered how user-friendly MarcEdit will be for cataloging staff users.
  - Lynn - Charlotte mentioned that they need to identify products that are available and look at pros and cons. What is the best product?
  - Jason - Concerned that MarcEdit is not open source ; also, secondary concerns about integration and ease of data exchange. They are resigned at Cornell that workflows will be broken, but is this the best solution? He also wanted to bring up the idea of a future need for non-marc editing. While we'd want that to be slightly longer term (Cornell is looking to build native RDF records). This is acceptable for version 1, but not for the future necessarily.
  - Texas A&M - They are very concerned. MarcEdit is good for batch jobs, but not appropriate for single record edits. Described the situation as "awkward." This is not the best possible solution.
  - Ann-Marie Breaux - An example of a difficulty with MarcEdit is it's lack of a user-friendly interface for the fixed fields. This may be an acceptable Version 1 solution, but not necessarily going forward from there. Seamlessness is very important.
  - Holly - Sebastian Hammer said there is a company in Italy that is looking to contribute a cataloging app.
  - Texas A&M - How will be able to search MARC records in MarcEdit?
  - Lynn - Search can happen at the Inventory level. That would represent the batch of records that
  - Texas A&M - There has to be a way to search against the full record. Where will that capability for that be? Right now Texas A&M can do an Access report. There is a lot of database maintenance in cataloging, which means every field needs to be searchable. Not sure where that will happen in FOLIO.
  - Holly - This is what Index Data needs to hear. No one from Index Data is on the call. Good to have this conversation with them. Important to iron out before getting further along.
  - Chew Chiat Naun - MarcEdit model is what we need. Do not build a separate internal system. MarcEdit is very powerful, but may not be the exact tool. It is the right model. Even though the pool of the developers is small, Terry Reese is very responsive.
  - Lynn - Charlotte is planning on being at the next meeting. She brought up the idea of us looking at other cataloging software tools that may be applicable. Are there other MARC editors that may be useful? Let Charlotte know.
  - Holly - Read an email that said within MarcEdit one could search and retrieve from FOLIO within the MarcEdit interface.
  - Lynn - reiterated that MarcEdit is more difficult when dealing with the fixed fields. Are there any actual alternatives?
  - Mike Winkler - There are not a lot of alternatives other than MarcEdit. "It's a major piece of functionality to export to someone else's roadmap." This came up in OLE discussions. There is a lower intensity for record by record editing. Most of what we do is more bulk oriented.
  - Ann-Marie Breaux - Referential cataloging may complicate things. However in Version 1, MarcEdit could search the inventory. Performance issues?
  - Mike Winkler - Issues of maintenance. Need a set of questions around integration
  - Laura - If the index is not searchable, what will be searchable. Where is MARC indexed?
  - Mike - It would be useful to codify concerns.
  - Lynn - Will create a Google Doc where we can all contribute our concerns / requirements.
  - Jason - Does Index Data have their own document? How do we feed into Index Data's functional requirements.
  - Holly - This group should be developing functional requirements. We should document what we need the product to do. Best approach to finding the right product is to document what we want the product to do. There may be something we can do to fill the gaps that MarcEdit may leave.
  - Lynn - We'll loop back to this conversation next week with Charlotte. Lynn will get in touch with Peter to see if he has some functional requirements.
  - Ann-Marie - What exactly should we be capture in this document?
  - Lynn - We want to make a list of questions for potential app partners. Lynn asked Mike to help contribute to the document.

Functional requirements Google Spreadsheet here: <https://drive.google.com/drive/folders/0B7G8S7WF6N20OWg5cUtZSmkweEE>

Questions for Cataloging App partners here: <https://docs.google.com/document/d/1M7IH-kFSmtHgMcyJ75chqacdfJWHrP6rq-1hMFs581/edit>

Please contribute requirements & questions to the above documents. Thanks!

Parking lot space for MM SIG issues

Ann-Marie Breaux

MM SIG Parking Lot; are there other issues we should add to the parking lot?

Action items

-