# 2019-09-11 Meeting notes

## Meeting URL

https://zoom.us/j/488543197

## Date

11 Sep 2019

## Attendees

- Michelle Suranofsky
- Erin Nettifee
- Patty Wanninger
- Björn Muschall
- Jana Freytag
- Mary E Yokubaitis
- Stefanie Sußmann
- Uschi Klute
- Maura Byrne
- please add your name

## Meeting Agenda

**Notetaker: Jana**

- Proposed meeting agenda
- Open Topics Requested from Meeting Attendees / POs
- Meeting Notes
  - New participants
  - REP-136: Unique Collection Services Report
  - UIU-1196: CRUD to add External System ID Fields to the User record in Settings
  - UIU-1198: Settings CRUD to allow additional External IDs to be used by Checkout
  - Other
- Test Results for User Search (Uschi)

## Proposed meeting agenda

1. **REP-136** - Getting issue details... STATUS (Patty)
2. **UIU-1198** - Getting issue details... STATUS (Patty)
3. Update on call for additional members (Erin)

## Open Topics Requested from Meeting Attendees / POs

| Item | Who | Notes | Discussed Today? | Resolution / Next Steps | Carry topic to next week? |
|------|-----|-------|------------------|-------------------------|---------------------------|
|      |     |       |                  |                         |                           |

| | | | | | |
|---|---|---|---|---|---|
| Searching by specific fields | Erin | Right now Users has general keyword searching; we will want to be able to search specific fields - IDs, emails, addresses, notes?<br><br>Perhaps one of these issues fits:<br><br>**UXPROD-1015** - Getting issue details... STATUS<br><br>**UXPROD-907** - Getting issue details... STATUS (New feature)<br><br>**UXPROD-869** - Getting issue details... STATUS (Epic)<br><br>**UXPROD-1941** - Getting issue details... STATUS (new feature) | YES | Uschi's test results see below | YES<br><br>• automatically truncation?<br>• split search (key-value search)? |
| Notes on user record providing popups | Steffi | notes may be used for communication about users, and pop-ups on user transaction (or displaying of notes) is desired. Khalilah indicated this should be raised as a new feature request. | | | |
| Bulk User import | Erin | from Slack channel<br><br>Does anyone know (or can tell me) what the current, supported approach is (or will be) for bulk importing user records? I can see a github for mod-user-import, jiras for that project with comments that ask if that mod is still being supported. |I can see a very old jira (https://issues.folio.org/browse/MODUSERS-3) for bulk-loading that was last updated last year.I can see a very old jira about performance improvements (https://issues.folio.org/browse/MODUIMP-4) that was last updated last | | Patty to ask for info / updates from Ebsco staff while in Sweden next week | |
| Deleting User Records | Erin | Discussing the need for deleting patron records (no Jira currently; need for one discussed in comments of https://issues.folio.org/browse/UIU-1079)<br><br>**UXPROD-291** - Getting issue details... STATUS | | Patty to write user stories | |
| Custom Fields | Uschi | **UXPROD-33** - Getting issue details... STATUS<br><br>the tag *cap-mvp* has been removed - reason? Further activities? | | | |
| Multiple Patron Identifiers | | Additional patron identifiers will not be in the MVP(?).  Conversation turns to custom fields and wondering if they are searchable.  Will custom fields work for multiple user identifiers?<br><br>Patty & Erin will work on users stories for:<br><br>• Repeatable ID Field which must be 'nameable' | | | |
| Other | | Patty will work on stories for:<br><br>• the department field<br>• preferred name/preferred pronouns | | | |

## Meeting Notes

### New participants

- Call out for new UM participants (especially from the implementers group)
- Björn will take it with him to the PC
- Missing Implementers: A&M, FLO, UA
- Patty will send Mails out

### REP-136: Unique Collection Services Report

- was dicsussed in RA
- It is not an issue for us
- Maura is going to double check with Ed Merkel

**UIU-1196: CRUD to add External System ID Fields to the User record in Settings**

- Checking the Scenarios
- Mock-ups for the table
- would be set in: settings/users
- unique fields should be specified via check box (check for uniqueness)
- Björn: should be not only on the UI but also in the batch load
- UI: check for duplicates should be in place
- batch load is blocked (to add external ids)
- loader shouldn't allow duplicates

**UIU-1198: Settings CRUD to allow additional External IDs to be used by Checkout**

- other settings mock-up
- everyone is ok with it

**Other**

- Patty is going to write a story for the departments
- add department name, code, source, update date
- were should it be displayed?
    - User Information or extended infotmation
- repeatable
- there will be a card sorting exercise with Beth German in the future
    - Erin: *Hey Erin, on Friday I contacted Beth German (TAMU) about the card sort exercise. She has been busy with a work transition. She plans to have the exercise ready in two weeks.*
- Search function:
    - search by type
    - search in the name field
    - search performance
    - What does the search box search at the moment: user name, name
    - required searches would be:
        - username
        - name

                - klute
                - klute, u
                - klute, uschi
        - mail
        - birth date
    - Search results, that work: klute@gbv.de , klute, u, klute, Barcode
    - Erin: performance concerns
    - Uschi: duplicates in username and name (she will test it)
    - Maura: Use Case lastname Li and Kim
    - Erin will follow up on that after she askes the RA SIG about it

# Test Results for User Search (Uschi)

These fields are taken into account

- Last name
- First name
- Username
- Barcode
- Email
- FOLIO number (=UUID)
- External system ID

These fields are <u>not</u> taken into account:

- Middle name
- name of Sponsor
- name of Proxy
- the other Address fields
- Birth date
- Notes: Note title / Note detail

The search term is automatically truncated. This may not be desirable in all cases.

Example: Searching with b also returns users whose UUID starts with b. 🤔 As the UUID is only shown in the "Extended information" accordion, I wonder why this user is present in the result set.

I would like to have the possibility to explicitly truncate the user:

- User A: Klute, Uschi 1
- User B: Klute, Uschi 2

Search term  expected result

- klute  no hits
- klute*  2 hits
- klute, u  no hits
- klute, u*  2 hits
- 1  no hits

Of course I don't want to get any hits from the ID fields (incl. barcode) when searching for a name....

Ideally there should be additionally a (sort of) key-value search for Last name, Username, Barcode, Email and System IDs.

Please try yourself in https://folio-testing.aws.indexdata.com/ and use the search term "uschi"