

2020-01-13 Reporting SIG Meeting notes

Date

13 Jan 2020

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 |
| | Jean Pajerek | Cornell University | X | Tod Olson | University of Chicago |
| X | Claudius Herkt-Januschek | SUB Hamburg | X | Scott Perry | University of Chicago |
| | Doreen Herold | Lehigh University | | Stefan Stadtherr | MPIL Heidelberg |
| | Anne L. Highsmith | Texas A&M | X | Simona Tabacaru | Texas A&M |
| | Harry Kaplanian | EBSCO | X | Kevin Walker | The University of Alabama |
| | Ingolf Kuss | hbz | | Charlotte Whitt | Index Data |
| | Lina Lakhia | SOAS | | Andi Bihler | Munich Technical University Library |
| | Joanne Leary | Cornell University | | Uschi Klute | GBV |
| X | Michael Patrick | The University of Alabama | | Vandana Shah | Cornell University |
| X | Nassib Nassar | Index Data | X | Angela Zoss | Duke University |
| X | Veit Köppen | University Magdeburg | | Lisa DeCarolis | Smith College/Five Colleges |
| X | Linda Miller | Cornell University | X | Elena O'Malley | Emerson |
| | Matt Harrington | Duke University | | Holly Mistlebauer | Cornell University |
| X | Jean Pajerek | Cornell University | X | Nancy Bolduc | Cornell University |
| X | Margaret Briand Wolfe | Boston College | X | Eric Pennington | Texas A&M |
| X | Sarah Park | Duke University | X | Christie Thomas | University of Chicago |
| | Clint Bellanger | Auburn University | | Cheryl Malmborg | University of Chicago |
| X | Joshua Lambert | Missouri State | X | Cathy Tuohy | Emmanuel College (FLO) |

Discussion Items

| Item | Who | Notes |
|---|---------|---|
| Attendance | Sharon | <p>Today's Attendance Taker: Linda Miller</p> <p>Today's notetaker: Angela Zoss</p> <p>Last week's notetaker: Vandana Shah</p> |
| Updates from Various Reporting Related Groups and Efforts | Various | <p>The Reporting SIG is using small work groups to address priorities and complete our work. Each week, we will provide updates to the Reporting SIG from these various reporting-related groups and efforts:</p> <ul style="list-style-type: none"> • Community and coordination: the group worked on planning for WOLFCON, as well as the plenary presentation. • LDP Data Privacy Working Group: no update • LDP SysOps Working Group: no update • Software development: Current work focuses on preparing the LDP Beta version to be released this month. Also beginning to work on support for MARC data and ERM data. |

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| <p>Guide to Attending WolfCon 2020 Reporting Sessions remotely</p> | <p>All</p> | <p>All Reporting SIG members are encouraged to attend the upcoming WolfCon sessions remotely. You can filter on "LDP" to see reporting topics.</p> <p>The ZOOM URL will be the same for all Reporting sessions: https://cornell.zoom.us/j/5196061050</p> <p>Here is the WolfCon 2020 schedule: https://wolfcon2020a.sched.com/</p> <p>NOTE: SIG will *not* meet Monday, January 20 - unrelated to WOLFcon, just a US Holiday</p> |
| <p>Q4 Fix Version Reporting JIRA Ticket Updates</p> | <p>Sharon</p> | <p>As the development timeframe of Q4 2019 has closed, we were asked to review and update our JIRA tickets assigned to this quarter. Let's take a look at the updates that were made:</p> <ul style="list-style-type: none"> • Fix Version Updates • Out of scope issues <p>There are a few reports/clusters that were requested but are not possible with just FOLIO data - that is, they include data from outside FOLIO, like ILL or Atlas integrations. We would like to reflect in JIRA that these reports are out of scope and need to be worked on by individual institutions (or groups of institutions) working on those integrations.</p> <p>For "fix versions" (or assigning a FOLIO release date to a JIRA issue), we only have a couple of issues that we can predict the release date. These fix versions are being applied to UXPROD issues, which is where we've been creating our cluster issues. Some of the clusters are out of scope because of a data integration (see above), others just haven't been started yet and can't get a fix version.</p> <ul style="list-style-type: none"> • UXPROD-2049 MM - Collections Analysis Cluster <ul style="list-style-type: none"> • note: MM cluster group has already listed the fields required for this cluster, so might be able to make progress soon • UXPROD-2025 RA-ILL Cluster <ul style="list-style-type: none"> • the reports in this cluster are all out of scope because FOLIO does not contain ILL data. Institutions need to look at these reports themselves • correction: sometimes ILL data is in FOLIO, because the loan is of an institution's item to someone at another institution, and some institutions use patron group to reflect that • these reports may need more information, maybe we should ask RA to provide additional details/specs • we could discuss this at WOLFcon • UXPROD-2030 RA-Reserves Atlas Cluster <ul style="list-style-type: none"> • seems like reports that require Atlas won't be possible • but is there work on doing reserves in FOLIO that would supplant Atlas/Ares? • Index Data may be working on a Reserves module • RA SIG is just starting to see development on Reserves module • Will ask at WOLFcon to try to get more information about what FOLIO is doing with reserves - maybe talk with Kelly Drake from FLO • Reporting SIG members should ask about integrations/reserves at their institutions |

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| <p>Prioritizing Reporting Clusters for the MVP</p> | <p>All</p> | <p>Several new reporting clusters have been created recently in JIRA as UXPROD issues. Each reporting cluster captures one or more reports with related data elements. We will review and prioritize these new issues for the MVP. Each institution should review and rank these clusters, as that will help with work prioritization.</p> <ul style="list-style-type: none"> • UXPROD-2051 MM - Shelflist Report Cluster - done • UXPROD-2052 MM - Quality Control Cluster - done • UXPROD-2049 MM - Collections Analysis Cluster- done • UXPROD-2216 Cataloging Status Cluster - done <ul style="list-style-type: none"> • Christie is working on this • There is a prototype - Uncatalogued materials report prototype • close to being done with finding all of the data points • UXPROD-2029 RA-Requests Cluster - done • UXPROD-2028 RA-Print vs. Eprint Cluster • UXPROD-2027 RA-Missing Items Cluster • UXPROD-2026 RA-ILL DocDel Cluster • UXPROD-2025 RA-ILL Cluster • UXPROD-2024 RA-Holds Cluster • UXPROD-2017 RA-Collections Recalls Cluster • UXPROD-2023 RA-Fine/fee Cluster • UXPROD-2022 RA-DocDel Cluster • UXPROD-2021 RA-Delivery Services Cluster • UXPROD-2020 RA-Collections UM Cluster • UXPROD-2019 RA-Collections Reserves Cluster • UXPROD-2018 RA-Collections Renewals Cluster • UXPROD-2215 LDP-MARC-table • UXPROD-2030 RA-Reserves Atlas Cluster • UXPROD-2031 RA-Serials Use Cluster • UXPROD-2032 RA-Slips Notices Cluster • UXPROD-1915 RA-Collections Use Cluster <p>Please rank yourself or send along to those at your institution who rank.</p> <ul style="list-style-type: none"> • only two FLO institutions are going live this summer, so there's a question about who should vote • FLO institutions will also be using separate instances • Think Kelly Drake will be going through • two going live are working with Index Data on some stuff <ul style="list-style-type: none"> • question about documentation - should we be including links to the wiki prototype pages in the JIRA cluster/report issues? • maybe would be better to have JIRA issues for the prototypes, so we could associate those with people and track progress more easily • or could track just as part of the ticket workflow - "being prototyped" • think we probably do want the tickets, even if we have more ticket management after that • would probably be LDP issue • would link the prototype issue to the cluster • another idea would be to just use the cluster ticket as the prototype ticket • will discuss in our community coordination group |
| <p>Reporting Prototypes and Queries</p> | <p>All</p> | <p>Let's review our Report Prototype and Query Development Project List</p> <ul style="list-style-type: none"> • Report Prototype and Query Development Project List <p>Meeting Notes: See notes in the list (column "status").</p> |
| <p>Additional Topics?</p> | <p>All</p> | |
| <p>Topics for Future Meetings</p> | <p>All</p> | <p>Review and update Topics for Future Reporting SIG Meetings</p> |

Action items

- Community and Coordination group to discuss how to maintain GDPR compliance for REP 147 and REP 148
- [Vandana Shah](#) to follow up on notes for changes to JIRA tickets for MM Reports and Report Clusters
- [Angela Zoss](#) work with [Nassib Nassar](#) to go over names list, create final proposal
- [Angela Zoss](#) (?) to share proposed list with POs of SIGs to make sure changed names still make sense
- [Angela Zoss](#) to follow up on concerns from Christie Thomas about developing queries using `json_extract_path_text`; does allow for joins on individual elements in an array, doesn't work on all reporting systems

