## 2020-05-06 User Management Meeting Notes

**Meeting URL**
https://zoom.us/j/488543197

**Date**
06 Mai 2020

**Attendees**
- Maura Byrne
- Uschi
- Jana Freytag
- Patty Wanninger
- Brooks Travis
- Catherine Smith
- Philip Robinson
- Khalilah Gambrell
- Nancy Burford
- Matthew Harrington
- Edward Merkel

**Goals (Agenda)**

1. Continue discussion/going through JIRA tickets:

<table>
<thead>
<tr>
<th>T</th>
<th>Key</th>
<th>Summary</th>
<th>Assignee</th>
<th>Reporter</th>
<th>P</th>
<th>Status</th>
<th>Resolution</th>
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<tr>
<td></td>
<td>UXPR OD-2289</td>
<td>Q3 2020</td>
<td>Custom Fields (for User Record and as General Platform Feature) Development</td>
<td>Khalilah Gambrell</td>
<td>Cate Boerema</td>
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<td>Custom Fields (for User Record and as General Platform Feature) Development</td>
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<td>UXPR OD-2248</td>
<td>Add custom field tokens to patron notices</td>
<td>Darcy Branchini</td>
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<td>UXPR OD-2212</td>
<td>Settings page. Inventory. Each institution can change settings based on their needs (long term solution - not mvp)</td>
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<td>Charlotte Whitt</td>
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<td>Custom Fields in Inventory</td>
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<td>UXPR-2207</td>
<td>SRS MARC-Inventory Instance relationship refinement, part 3</td>
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<td>UXPR-2147</td>
<td>Users App: Department Field</td>
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<td>UXPR-2062</td>
<td>Anonymized loans: retain patron custom fields data</td>
<td>Emma Boettcher Emma Boettcher</td>
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<td>Order/sequence of items within a holdings record. Add and (manually) re-order Item records</td>
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<td>UXPR-1400</td>
<td>Users App: Implement Affiliation Group/Statistical Codes support in same manner as Inventory App</td>
<td>Patty Wanninger Khalilah Gambrell</td>
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<td>UXPR-951</td>
<td>Ability to create forms and embed on a website</td>
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<td>UXPR-849</td>
<td>Lightweight ticketing app within FOLIO</td>
<td>Unassigned Ingolf Kuss</td>
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Showing 20 out of 37 issues

Notes

1. JIRA Tickets on custom fields:
   a. Splitting of UXPROD-1295
   b. UXPROD-1864
   c. UXPROD-2062
      i. Separate statistical code field - Note from Emma: "Patron group was retained on anonymized loans through UXPROD-1120. Edited scope of issue to only include custom fields, as statistical codes are not separate fields yet."
      ii. Comment UM SIG: some custom fields in users should not be retained as they might contained identifiable information
   d. UXPROD-2147 Department field:
      i. UIU-1211 (CRUD permissions for departments in User record)
        1. Do we want to have the developers spent time on it or are we ok with the custom field situation? General consensus was yes.
        2. Patty W. said that CRUD permissions should be assignable to users. There was general agreement
3. simple Information for reporting (MB: I think this relates to my note, which reads in its entirety: "Department - Notices, Fines? NO")
   ii. UIU-1224 (Show Department in UI)
       1. Do we still need this function as described in the report, or do we need to revise the user story?
       2. Post-meeting update(MB): I have checked my institution's Fameflower instance, and it doesn't have Departments in the User Record. Also, there's no target delivery date, and it appears to be low-priority. In the initial comments, there was a note to discuss with developers to see if refactoring, which had to be done previously, can be avoided this time.
   e. UXPROD-2248 Custom field tokens for patron notices & UXPROD-1831 Add additional USER tokens to patron notices
      i. this would be required, for example, for the preferred name
      ii. a token should be attached to it (Brooks Travis)
      iii. we should all take a look at UXPROD-2248 and rank it.
   f. UXPROD-1400 Implement Affiliation Group/Statistical Codes support in same manner as Inventory App
      i. Tags would not be sufficient for that and there is some information that we would want to see here
      ii. Maura B. was under the impression that the coding was done in the Inventory app, and could be imported wholesale into UM.
      iii. The concept of a "type box" would be popular. (MB: specificity failure in notes.)
      iv. This is not in the plan (ticket is marked "won't do"). We would have to upvote it to make it happen.
      v. Could Department be folded into Statistical Codes?
         1. Cornell does it, but it is not ideal
         2. Department doesn't map cleanly to a statistical code.
   g. UXPROD-2148: Users App: Support multiple External System IDs
      i. Multiple ID support is important for adoption.
      ii. Aleph at Duke gives the expectation that multiple IDs can be supported.
   h. UXPROD-1813: Honorific on user record
      i. This might be a good use for Custom Fields, but requires a token.
      ii. is important for german libraries (ranking required!)
   i. UXPROD-1790 Additional name fields on user record (preferred name and preferred pronouns)
      i. This might be handled through Custom Fields, at least to start
      ii. A possible workaround could have preferred name/pronoun handled through the patron load