

2019-06-10 Reporting SIG Meeting notes

Date

10 Jun 2019

Attendees

Present?	Name	Organization	Present?	Name	Organization
X	Sharon Beltaine	Cornell University	X	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
	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
X	Nassib Nassar	Index Data	X	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
	Ann Crowley	Cornell	X	Eric Pennington	Texas A&M
	Veit Köppen				

Discussion Items

Item	Who	Notes
Attendance	Sharon	Today's Attendance Taker: Linda Miller Today's notetaker: Vandana Shah Last week's notetaker: Tod Olson
Updates on Reporting SIG Meeting Schedule	Sharon	Reminder: Please note that we will not hold a Reporting SIG meeting on Monday, June 17 from 9-10am EDT, due to a conflict with the Plenary Presentation at the FOLIO conference in DC.

Report Prioritization for Development in Data Warehouse	All	<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"> We will determine whether to categorize each of the 20 In App Resource Management reports as in app or for LDP based on feedback from Dennis last Reporting SIG meeting. Please note the JIRA issues on search/filter/calc/export within RM application features that are relevant to this analysis: <ul style="list-style-type: none"> UXPROD-1760 - Search result summary widget DRAFT Search result summary widget UXPROD-1403 - Export Current selection to CSV CLOSED Export Current selection to CSV UXPROD-704 - Ability to export and import the associated Funds and Budgets for a certain Ledger CLOSED Ability to export and import the associated Funds and Budgets for a certain Ledger Eric Pennington will discuss the Shelf List Location report data model <p>Notes:</p> <p>Sharon Beltaine went through the list of 20 In App Resource Management reports. Most of the 'open orders' reports can be combined. These may need to be in both In App and data warehouse versions; the In App ones will contain a smaller number of elements, but we need to also have reports with more a more detailed list of elements, so as to tie in some of the information with other reports. From the list of 20, several were re-classified as data warehouse (REP) reports.</p> <p>Eric Pennington discussed the Shelf List Location report data model. How exactly the 'last transaction date' and 'historic charges' elements will be included is still not completely clear, but the report is ready for data modeling at this point.</p> <p>Holly Mistlebauer added filters for functional areas in JIRA, making it easier to identify reports containing issues related to specific areas on interest: see Viewing Reporting JIRA Issues with Filters</p> <p>Vandana Shah reported that there ere no new updates from the Data Privacy Subgroup, but we hope to have some by the next meeting.</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