

2017-05-15 - Reporting SIG Notes

Date

15 May 2017

Attendees

- [Lydia Pettis](#)
- [Charlotte Whitt](#) (note taker)
- [Michael Winkler](#)
- [Lynn Whittenberger](#)
- [Ingolf Kuss](#)
- [Anne L. Highsmith](#)
- [Joanne Leary](#)
- [Scott Perry](#)

Goals

- Check status of report and spreadsheet updates
- Discuss the use of 3rd party system
- Discuss the distinction and need for reporting on data based on a snap shot of the system and the dataware house approach

Discussion items

Time	Item	Who	Notes
2 min	Welcome new member Doreen Herold from Auburn	Lydia	Will wait with the welcome round until Doreen is present.
5-8 min	Check status of report / spreadsheet updates	Lydia + group	Status of spreadsheet updates: <ul style="list-style-type: none">• Lydia is 60-70 % complete with update of the spreadsheet. Still have some files to upload. Cranking away with the spreadsheet.• Joanne, still cranking• Scott will update the spreadsheet in the next 1-2 weeks• Anne has added some updates• Ingolf has added all the hbz fields, and is done with the task. Ingolf works for a library service center, and therefore does not have any use cases on usage data.

45 min	other?		<p>Topics for further discussion:</p> <ul style="list-style-type: none"> Anne suggests, that we also talk about data abstract, e.g. all of the projects or needs in which we now contributes MARC records. Mike W. agreed, and stated that reporting is sort of misnomer in this context. This is being able to abstract and format data in a variety of purposes. Lydia told, at Duke they abstract tons of data, and also import lot of data; going in an out of OCLC. Lydia mentioned, data transfer within the universities systems, e.g. bursar transfer, which is also an important part of the daily routines. <p>As follow up from last week's meeting and the email correspondence with Peter re. transactions available to reporting utilities. Lydia asked, what exactly is meant by investigating 3rd party reporting tools? (About the Reporting SIG). Peter has explained in the emails that essential there will be apps which shoot the transaction to an SQL database or dataware house, and reporting will be done of the dataware house system. Lydia concluded, that it is difficult to examine any 3rd party systems until the Reporting SIG has some data to look at. Cornell is looking at a more web based reporting system, than the current MS Access system. It will be interesting to see, how access to reporting will change, when moving to FOLIO.</p> <p>Anne asked, why is FOLIO being designed, so we don't have access to the direct database. Charlotte referred from Peter's email, that there is still an ongoing discussion among the developers. Mike explained, this decision is less a design concept, and more the idea that FOLIO itself is using APIs. The idea is that you can replace any API whatsoever, and it will not effect the rest of the system. This concept idea works also for the database. APIs will define a set of functions without specifying, that the database has to work in a certain way.</p> <p>There was great interest in the Dublin meeting, and what the expected outcome of this developer meeting will be. It will be relevant to get on paper, how access to the data in FOLIO will be. Index Data will provide more information.</p> <p>Lydia said; Much of the data used for reporting do not require instant access (can be based on yesterdays data), but do have critical data needs, e.g. a fiscal year roll over. But there is also the situation, where data updated very recently (in the past 5 minutes), e.g. a report generated as soon as someone has completed a specific task, so the person can review, and correct mistakes. Mike added, that this is part of the critical distinction between streaming data out (a snap shot of the system) and the dataware house approach is, doing an analysis, where it is the trend rather than the last moments of data changes.</p> <p>Ingolf asked, what will be the time delay of the storage using the HTTP transaction. Mike answered, that is probably not known yet. Joanne commented, that this is important to know. Important to add these kind of information to the spreadsheet, this can categorizes as classes of information, e.g. fiscal roll over. Important to note in the spreadsheet where there is a need for real time data, and add a note, or insert a link to a specific example.</p> <p>Mike asked, are there tools you use when you produce reports, particularly when you are blending things together, massaging the data, preparing formats, using graphical and/or analysing tools - 3rd party system outsiden your current ILS. Charlotte suggested doing online demo showing how the different support systems works - what works well, what doesn't work that well. If the group preferred to do screen shoots from their 3rd party systems, that would work as well.</p> <p>Lynn suggested to do a snap shot of her query list. Tasks can be really complex, and require a stream of queries.</p> <p>The group talked about doing demos at one of the upcoming meetings:</p> <ul style="list-style-type: none"> Anne and Simone could present their local solution written in to a 3rd party tool (MIS) Lynn could demo MS Access Joanne could present reporting in connection to circulation <p>Lynn suggested in addition to the demo, if everyone in the group could share the tools they use when manipulating the data and what format they get out of the system. At NCSU Libraries get flat text files, and some of them are designated for SAS, Excel, or MS Access. Mike agreed, and also said, that it would be interesting to talk about, why a certain program is chosen.</p>
5 min	May 22 meeting; Lydia absent... cancel or not?	Lydia	<p>Next meeting is scheduled for 6/12/2017.</p> <p>Continue the discussion on email until we meet next time.</p>

Action items

- Completion of adding usecases to the [spreadsheet](#) (internal sprint)
- Follow up on the database design - access to real time data (Peter, Charlotte)