

2019-08-15 Metadata Management Meeting notes

Date

15 Aug 2019

Attendees

please put an 'x' next to your name in the list below the "Discussion items" if you are attending. Thanks!

Discussion items

Product Council Update	Dracine Hodges	<p>There was a presentation from the Capacity Planning Team regarding the MVP and the prioritization of features. The Council tentatively approved the recommendation from the Capacity Planning Team. Goal - identify what libraries will be able to implement based on the Capacity Planning Team's recommendations. By August 27, Project Council is looking for at least 5 libraries to commit to going live with FOLIO by the summer of 2020.</p> <p>The group can go to the Product Council's meeting minutes.</p>
Subgroup Updates and Other Updates		<p>Metadata Export Group: Magda reported: This new group will meet on Thursdays between 2:00 and 3:00 pm. Meetings will be recorded. The first meeting will be scheduled for August 29th.</p> <p>Christie and Laura joined the first part of today's RA meeting to speak with the group about bound-with materials. Laura will work on a mock-up.</p>
Feature ranking /new features?		<p>Note: Please post questions about these on Slack. Dracine said there is a chance new rankings of these features could influence MVP rankings if there are available resources.</p> <p>UXPROD-1922 Item. Easy copy of barcode and make barcode a link in item list</p> <p>UXPROD-1923 Settings > Inventory > Item: Implement material type category</p> <p>UXPROD-1924 Item. Copy should not be a repeatable element</p> <p>UXPROD-1889 Instance: Delete warning when deleting format or contributor type</p> <p>UXPROD-1890 Instance: Additional controlled vocabularies for Instance menus</p> <p>UXPROD-1891 Instance: Lookup by code (contributor type, resource type and format)</p> <p>UXPROD-1892 Instance: Add related instances data element</p> <p>UXPROD-1893 Instance: Implement preceding and succeeding titles</p> <p>UXPROD-1894 Settings > Inventory > Instance: Implement format category</p>
PO-MVP /MVP and Capacity Planning update	Laura Wright	<p>Inventory features - CWFeaturesByEpic</p> <p>Note that the "cap-mvp" is not the same as the "po-mvp".</p> <p>Felix: "Will the features marked cap-mvp be developed by summer 2020?" - Charlotte - "yes"</p> <p>Christie: Is the goal to have features ready for testing by January 2020, to give six months time for testing and training? Laura: "Early December 2020 is the goal for having a feature freeze"</p> <p>Work on Search and Sort query would probably be possible to implement after Q1, 2020.</p>
Search in Inventory update, mock-up	Charlotte Whitt	<p>Slide deck - Search in Inventory - UXPROD-140 (Misc. UX) – 🍌 and not completely done (time was running too fast)</p> <p>There is no UX to model the look of the advanced search feature in Inventory, yet. The "Orders" app has some developments we may wish to replicate. For example, there is the ability to have default open filter list, and default closed lists. Look-ups within the Locations filter is possible. In "Date created" there are fields that enable a user to define a time period.</p> <p>In the Finance, Orders, and Agreements app they have what could serve as a model in Inventory for changing the search criteria from Instance, to Holdings, or Items.</p> <p>Felix (via chat) - "Will there be batch edit functionality in MarcCat? Could be an option to not have to export -> edit -> import. Instead make the changes directly in MarcCat."</p>

Multiple Graphical Representations

Laura Wright, Jacquie Samples, Christie Thomas

Laura, Christie, and Jacquie met with Tech Council Aug. 7 – still some work to be done around ideal display options and sample data

working document:

<https://docs.google.com/document/d/1e6zlt7Gsd50W1HsRWW6aerCIXYe1I7XACaInVuWcoE/edit>

Problems:

- If multiple forms of the value are represented in a single JSON object, both scripts have to be included in a single value cell. This limits the search function.
- Chicago is testing graphical representation in FOLIO. Here is an example:



- See MARC record: <https://catalog.lib.uchicago.edu/vufind/Record/8539712/Details#tabnav>
- See JSON sample: (Christie will provide)
- Functional requirements need to be built so developers can understand the issues. What would we like to have happen in FOLIO?
- Proposed solution:
 - Single JSON object for the property, e.g., Title, with the ability to have an array of values for display (labels).
 - Values should allow for a property that identifies the script.
 - This would allow for the ability to configure displays to include multiple representations or a selection of representations.

Functional requirement: Create an instance record and be able to have multiple graphical representations of the language, or be able to put a non-transliterated title that can be searched in other scripts.

Note: Charlotte has added following feature description (UXPROD) in Jira:

 **UXPROD-1646** - Multiple graphical representations in FOLIO, e.g. resource titles in Inventory DRAFT

Christie expressed hesitation about being too prescriptive about what the JSON should look like. She suggested spending time on the Functional Requirements. Suggestions for additional functional requirements were added to the Google doc: [DR AFT - Multiple graphical representations in FOLIO](#). (Also linked above.)

The group also would like to make recommendations as to what this should look like in the FOLIO interface. Example systems that work well?

Future meeting topics		<p>Source of truth (SRS). Review the FOLIO metadata flow based on test of the newly implementation of edit freeze of records in Inventory when having only SRS and Inventory installed.</p> <p>Inventory Permissions ( UXPROD-1374 - Inventory Permissions (Basic CRUD) CLOSED)</p> <p>Search enhancements - possible also look at more general requirements for defining search, e.g. when to use: Phrase search, Truncating (left and/or right), Stemming, Nested search, Boolean search, etc. (TC and MM task)</p> <p>Authority Data and Inventory Vision (small group work first)</p> <p>Discovery – need to clarify sources of data for discovery vs. data needed for operations; this needs to be documented for the entire FOLIO community and direction should come from Product Council</p> <p>Item record statuses and the apps that affect them</p> <p>Music / Maps / Media cataloging review of data elements in Inventory</p> <p>Felix (via chat) "@charlotte: I could ask a colleague (from one of the 180 network libraries) if she/he could review the beta elements from a 'musical' point of view."</p> <p>Texas A&M may have a music cataloger that can help.</p> <p>Christie offered to load cartographic and music data from other libraries into their test FOLIO instance.</p> <p>Jennifer (via chat): We should also look at video as well. Videos have other standard numbers EAN for instance and fields that people like to search and discovery them by</p> <p>https://wiki.folio.org/pages/viewpage.action?pageId=78336464</p>
-----------------------	--	--

present?	Name	Organization
x	Aaron Trehub	Auburn
	Alice Krim	
	Ann-Marie Breaux	EBSCO
	Ann Kardos	UMass Amherst
x	Charlotte Whitt	Index Data
x	Christie Thomas	Chicago
x	Colin Van Alstine	Smith (FC)
	Damian Biagi	
	Dennis Bridges	Stacks
x	Dennis Christman	Duke University
x	Dracine Hodges	Duke University
x	Felix Hemme	ZBW
	Filip Jakobsen	
x	Jacquie Samples	Duke University
x	Jason Kovari	Cornell
x	Jenn Colt	Cornell
x	Jennifer Eustis	UMass Amherst
x	Jessica Janecki	Duke University
	Kristen Wilson	Index Data
x	Laura Wright	Cornell
x	Lisa Furubotten	Texas A&M
x	Lisa McColl	Lehigh University
	Lisa Sjögren	Chalmers
x	Lynn Whittenberger	

x	Martina Schildt	VZG
x	Mary Alexander	Univ. of Alabama
	Nancy Lorimer	Stanford
	Natascha Owens	Chicago
	Niels Erik Nielsen	
	Patty Wanninger	EBSCO
x	Rita Albrecht	HeBIS-Verbundzentrale
x	Sara Colglazier	MHC/5C
	Sarah Ross	Cornell
	Sarah Schmidt	Duke University
	Tiziana Possemato	
	Theodor Tolstoy	EBSCO
	Wayne Schneider	Index Data