

2020-05-28 Metadata Management Meeting notes

Date

28 May 2020

Attendees

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

Recordings

Recordings of meetings can be found in the **Metadata_Management_SIG > Recordings** folder on Google Drive: <https://drive.google.com/drive/folders/0B7G8S7WF6N20YUM4My1oRTIxSHM>

Discussion items

Product Council Update	Dracine gave the update on today's meeting. Cate Boerema gave an update on Product Owners. She introduced Lucy Lu who will be working with the Shanghai Libraries as a Product Owner. Lucy speaks Mandarin and English. Todd Olsen will be the new PO for SSO. Cate spoke about release notes based on feedback from Chalmers. Kirstin and Maike ZBW and WDR broadcasting will be going live with FOLIO. Chair elections for Chair and Vice Chair of Product Councils.
Subgroup & other updates?	<p>Data Import: MARC Holdings-to-Inventory Holdings working group will meet next week to finalize the default map. If any libraries besides Alabama, Duke, and Texas A&M plan to store MARC Holdings in FOLIO, please tell Ann-Marie Breaux ASAP.</p> <p>Upcoming meetings:</p> <ul style="list-style-type: none">• 6/4 - Marcia Borensztajn documentation writer, will join us• 6/11 - Emma Boettcher will be with us to talk about work of the Item Status group• 6/18 - Tiziana Possemato will join us to talk about MARCCat

<p>Cross-app searching use cases: search and results expectations?</p>	<p>See use cases for pre-order searching</p> <p>Are there additional use cases for cross-app searching?</p> <ul style="list-style-type: none"> • What fields would you expect to be able to search on? • Action: Add use cases to the pre-order searching document, but specify that a different use case. <p>Other use cases discussion</p> <ul style="list-style-type: none"> • needing to use all the ways we have access to a resource. • Searching MARC data from the UI. Is this a place for cross app searching? • Cross-app searching needed because we you don't want to have to create dummy inventory records just to assist in searching. • More to the point is "cross-app results" as opposed to just searching. • Use case: Searching invoices and agreements • Keyword search in a cross app search tool, what do we expect to be indexed? • Phase 2 of tags - being able to see where a tag is used across apps. Not yet implemented, but sorted out. • Are there any apps that will not have a core set of elements? Example: SRS because MARC data has many unique properties. • Finding commonalities of records between apps is difficult. <p>How would you expect results to display? (What/how much information?)</p> <ul style="list-style-type: none"> • Depends on what is being searched. Flexibility is key. • Ability to drill down from results to origination of full record desired. • Icons to label origin of info? Maybe be an accessibility issue • Difficult to have a result screen because of disparate data underlying apps. Maybe this is for a later phase. • Bento results list? • Would IDs help display relationships? Relationships are important. • In discussion - create and agreement line for something in Inventory - right now this is possible for e-holdings. <p>Cross-app Use Cases</p> <p>Knowing all of the versions of an owned or accessible resource.</p> <p>Need to search outside of FOLIO for owned or accessible resources.</p> <p>Any place dummy records would be created could lead to a use case.</p> <p>Crossing between levels of bibliographic data, like records for a series. This was discussed in relation to having container records.</p> <p>Search results that show which institution in a consortium environment owns the resource. Consortia SIG?</p> <p>Action: App Interaction SIG meets tomorrow. If you have other thoughts, message Laura or add info here so Laura can convey ideas.</p>
<p>Feature review (ongoing)</p>	<p>MARC authority & holdings data</p> <p>features:</p> <p>https://docs.google.com/spreadsheets/d/1loGBR4uWXCTDeag5tIMf0fRD0BFD8b8r84IOgS0ZUUUE/edit?usp=sharing</p> <p>ranking: https://docs.google.com/spreadsheets/d/1g8pCNmg2DrGJzUAtQHXPas8M9WIDXijnY4q666teeDc/edit#gid=0</p> <p>Where will MARC holdings data be stored, where will authority data be stored? SRS for non-bibliographic MARC data?</p> <p>Holdings: If a library chooses to store MARC Holdings, they will load into SRS. A default map will be used to populate Inventory Holdings. There are fields in Inventory Holdings not controlled by MARC. Not part of QuickMARC editor, yet. Expectation is that they are editable in MARCCat. MARCCat may be needed for complex serials, but QuickMARC should suffice for most use cases. Note that at the moment there is no way to create in QuickMARC, only edit. Duke has holdings records for all physical monograph resources. Nice to create FOLIO Inventory holdings, initiating an underlying MARC Holdings record.</p> <p>Authorities: Do not manifest in Inventory in any way. They will be stored in SRS. They will be able to edit and create them in MARCCat. Some libraries do not store authorities locally. Duke does store MARC authorities locally. Cornell and Chicago store entire authority file locally, (Chicago, not stored in system currently, but Cornell does store in Voyager). They both use this for discovery. Discuss in Entities Management Working Group, as well as with Tiziana when she comes to our 6/18 meeting. Has needed work changed? Are architecture needs different?</p> <p>Note from chat: "There could be an advantage of having authority records in Inventory when it comes to searching on different names and headings."</p>
<p>Future MM meetings (ongoing)</p>	<p>Add ideas here</p> <p>https://docs.google.com/document/d/1u1tvfVxn6i3fTlMrWWCYHlh7RT5cf3_G7YgDuxKob4M/edit</p>

present?	Name	Organization
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	Aaron Trehub	Auburn
x	Ann-Marie Breaux	EBSCO
	Ann Kardos	UMass Amherst
	Charlotte Whitt	Index Data
	Christie Thomas	Chicago
	Christin Seegert	hbz
	Colin Van Alstine	Smith (FC)
	Damian Biagi	
x	Dennis Bridges	Stacks
x	Dennis Christman	Duke University
	Douglas Chorpita	Goethe Uni Frankfurt
x	Dracine Hodges	Duke University
x	Felix Hemme	ZBW
	Filip Jakobsen	
x	Jacque Samples	Duke University
	Jason Kovari	Cornell
	Jenn Colt	Cornell
	Jennifer Eustis	UMass Amherst
	Jessica Janecki	Duke University
	Kristen Wilson	Index Data
x	Laura Wright	Cornell
	Lisa Furubotten	Texas A&M
	Lisa McColl	Lehigh University
	Lisa Sjögren	Chalmers
	Lynn Whittenberger	
	Magda Zacharska	EBSCO
	Martina Schildt	VZG
	Nancy Lorimer	Stanford
	Natascha Owens	Chicago
	Niels Erik Nielsen	
	Patty Wanninger	EBSCO
x	Rita Albrecht	HeBIS-Verbundzentrale
	Sara Colglazier	MHC/5C
	Tiziana Possemato	
	Theodor Tolstoy	EBSCO
	Wayne Schneider	Index Data
x	Lloyd Chittenden	Marmot Library Network