2020-02-25 Meeting notes

Date
25 Feb 2020

Attendees
- Karen Newbery
- Martina Schildt
- Paula Sullenger
- Thomas C. Wilson
- Peter Murray
- Elizabeth German
- Ian Walls
- Patty Wanninger
- Chulin Meng
- Kelly Drake
- Ann-Marie Breaux
- Kristen Wilson
- Brooks Travis
- Jenn Colt
- Charlotte Whitt
- Steven Bischof
- Unknown User (aneslin)

Goals

Discussion items

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<th>Time</th>
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<td>50min</td>
<td>Data Import app</td>
<td>Ann-Marie Breaux</td>
<td><strong>This session was recorded and the demo was very visual and will be more informative than these notes.</strong> AMB reviewed the current state of the slim MARC edit app. Can match on one field for Q1/Fameflower for incoming MARC bib records. Can get to the instance record. Can also match to purchase order lines or invoices (planned for Q2/Goldenrod). Q-Would editing in this affect the source record? A-If you save to SRS it would change the instance, or you can update the instance and throw it away. &quot;Match record&quot; just determines if there is a matching record or not. The library will have to set up match profiles. The process is started by a job process. &quot;Job&quot; refers to a combination of matches and actions. Haven't worked on holdings or authorities yet, hopefully in Q2/Goldenrod. Also integration with MARCCat and a simple MARC editor. Discussion about the need for MARC Holdings - some libraries, particularly the Voyager libraries, still want/need these, so this is being built to accommodate them. Should be able to create MARC records by end of Q1/Fameflower, not sure about updates to holdings and items in Q1/Fameflower. If the underlying source MARC changes, it does change the instance. There is a default mapping that controls matching, few fields that are updatable outside of that. The default map always controls what's going on between the source record and instance so you don't want to do much tweaking. Suggestion to have a session after Q1/Fameflower to go over how to apply. Also the need for documentation. AMB is looking for testers. Discussion about testing complete acq workflow - test with Q4/Edelweiss or wait for Q1/Fameflower? The Q1/Fameflower will be much more complete. Acq is huge so need to break into chunks.</td>
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<td>Round 2 things</td>
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<td><strong>Discus</strong></td>
<td><strong>sion regarding future meeting format.</strong> Kelly Drake A few folks have suggested that it would be good for the Round II libraries to demo their proposed workflows and discuss workarounds. The idea being we schedule these sessions in advance, and all implementing libraries could invite staff that work in the specific areas as well as POs. Suggestion to go over Acq functions over the next couple of meetings. How do we describe what we want the implementers to do? Bring a use case to life, identify workarounds, get suggestions. Implementer walk-through? Kelly will work with Karen for getting the agenda together.</td>
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