2020-09-22 Meeting notes

Date
22 Sep 2020

Attendees
Paula Sullenger
Jean M. Pajerek
Kelly Drake
Jackie Magagnosc
Molly Driscoll
Debra Howell
Tracy L Patton
Mark Arnold
Marie Widigson
@Dwayne Swigert
Janice Pfaff
Brooks Travis
Martina Tumulla
Karen Newbery
@Joanna Cerro
Lisa Sjögren
Peter Murray
@urszula Knepper
Ian Walls
Elizabeth German
Tod Olson
Steven Bischof

Goals

Discussion items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Notes</th>
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Finish ranking definitions

<table>
<thead>
<tr>
<th>RANK</th>
<th>DEFINITION</th>
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<tbody>
<tr>
<td>R1 - Urgent</td>
<td>Cannot implement without this feature; Cannot complete critical functions without this feature</td>
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<tr>
<td>R2 - High</td>
<td>Library operations are severely curtailed; Significantly lowers productivity; Cannot fulfill obligations to patrons or partners</td>
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<td>R3 - Medium</td>
<td>Can perform normal operations but productivity is noticeably lower; Workaround is insufficient and suitable only for short-term use</td>
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<td>R4 - Low</td>
<td>Has minimal impact on productivity; Feature commonly available in other ILS/LSPs; nice to have; Workaround is viable although long-term solution is still needed (or workaround lacks functionality)</td>
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<td>R5 - Not needed</td>
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Topics of interest

Debra Howell

Round IV and Potential Workarounds

Based on UXPROD-1752, optimistic locking, where it was ranked but there was a workaround, which didn't actually work.

Debra found 64 workarounds in JIRA - some are go-live (20) and showstoppers (6) for Cornell that aren't being worked on. She was told to make comments in JIRA

Do other institutions want to do the same search - look for your features that have workarounds that aren't actually workarounds?

Search filter: "Potential Workaround" is not EMPTY AND labels = round_iv

If the workaround doesn't work, put a comment in the JIRA

If several of us are having the same issues can we work together to get them addressed. Mike Gorrell of CPT is aware of the issue. Debra has requested that people stop using the workaround field for comments

Cornell’s DRAFT list of issues with no workaround

Note: this is a draft, there may be three issues that really have workarounds.

Big issues:

- **UXPROD-2092** - Improved “Fielded” searching in User app [CLOSED]
- **UXPROD-1659** - Missing pieces and damaged items [OPEN]
- **UXPROD-1636** - Make Hold Shelf Expiration Date Respect Closed Library Days/Hours [ANALYSIS COMPLETE]
- **UXPROD-1056** - Requests: track and display all changes to a request [DRAFT]
- **UXPROD-1015** - Boolean/Query Search for Users [DRAFT] and
- **UXPROD-902** - Advanced Search (Within Apps) [CLOSED]
- **UXPROD-875** - Loan Rules: Exceptions, Modifiers and Special Selectors [CLOSED]
- **UXPROD-845** - Fees/Fines in-app reports: Balance cash drawer for fees/fines [CLOSED]
- **UXPROD-728** - Pay lost item fee/line with replacement copy [OPEN]
- **UXPROD-532** - Claim returned: track searches [ANALYSIS COMPLETE]
- **UXPROD-284** - Wait for POC of Elastic Search. Item search and select popup [OPEN]
Showstoppers:

- UXPROD-2616 - Ability to kill a long-running or errored data import (CLOSED)
- UXPROD-2551 - NFR: Data Import (Batch Importer for Bib Acq) & PubSub Q3 2020 Technical, NFR, & Misc bug work (CLOSED)
- UXPROD-2200 - Create interactive log-summary of batchload results, next steps (OPEN)
- UXPROD-1890 - Patron Comments on Request (CLOSED)
- UXPROD-1752 - Prevent update conflicts (via optimistic locking): platform support for detection (CLOSED)
- UXPROD-1407 - Loans in-app report: Item loan history (OPEN)

Goldenrodstandees

- MSU, Cornell (testing), Chalmers will upgrade in two weeks, Texas A&M's not stable enough for testing, Cornell will go live with ERM Oct 1
  - Data import - MSU - not functioning as expected - source records not linking to instance? Lehigh has a workflow to do this but it's clunky. Can't match on 035 so can't update OCLC; for all practical purposes we don't have data import; Bywater is looking into their institutions to see how it's working there
  - QuickMARC working well
  - OAI/PMH - still not working, not updated since Fameflower, becoming a problem for MSU; Bywater feels they've been updated
  - Not a lot new in Acq - suppress in MARC, not sure it's being suppressed in EDS
  - How will Chicago get its records for VuFind? Not worked out yet
  - Chalmers - getting records direct from their national catalog
  - Simmons hoping to test OAI/PMH next month
  - ERM? 5 Colleges - some are implementing - Chalmers doing OK, but would like the tag features to improve;

- Are implemented libraries still ranking features? MSU is trying, Chalmers has not had time, prioritizing bug reports
- Chalmers hot topics - lack of title level request;

Topics for next week

- Emma Boettcher, PO for item status - trying to work out a plan for if the custom item status feature doesn't make it into the development plan before implementers go live with FOLIO. Would like to discuss what item statuses should be prioritized for development.
- Someone from CPT to discuss workaround issue?

Action items