Productivity Statistics Working Group

Proposed in the Aug. 20, 2020 MM SIG meeting

Goals: document use cases for productivity tracking statistics; investigate & develop short-term solutions for productivity tracking in FOLIO; define a long-term solution for productivity tracking in FOLIO

Membership

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<thead>
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<th>Name / contact</th>
<th>FOLIO area(s)</th>
<th>Institution / role</th>
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Slack channel: #folio-productivity-stats

Some examples and discussion (slides)

Google drive documents

Common understanding of what productivity statistics are and what we need, make sure not to exclude needs outside metadata/cataloging

Which apps are involved?

Notes (05 January 2021):

- jesse will add info to the vision statement about acquisitions
- also will send an e-mail to Kristin to get updates for stats in receiving app
- how to count statistics for acquisitions (receiving app)?
- Will suggest the element is added to instance, holding, and item
- work arounds:
  - how to map MARC source data to instance or maybe holdings element
  - Custom note (instance) say: productivity stats mapping from local MARC tag to the Productivity Note
  - Once the element we are producing gets approved, new cataloging/acquisitions would get mapped to the appropriate 'field' in the new element
- reporting tool (platform) is now called MetadB?
- no freetext fields in admin metadata (so, we can't use that, even though it might be the best place for it)
- proposing a freetext field in Administrative data at the instance level

Notes (20 November 2020):

- Element suggestions
- Demo of Duke's cataloging using aleph and the data warehouse
- assuming ISO date format in FOLIO
- how will be attach an ID for batch loads such as from GOBI or OCLC?
- can the proposed element get stamped automatically with the date-time-stamp as well as an API or batch process that would probably need a permission or token to work anyway
- no meeting in december, work on vision statement and use cases, and talk about contingencies in January

Notes (6 November 2020):

- Looking at the Element Codes document here.
- ref: CAT field in ALEPH (tracking historical changes)
- How to deal with 'change tracker'
- want to see which line was changed (say, a note was added or edited)
- tracking MARC updates generally with a code that something was changed, not necessarily needing to know what, but is tracked in the same way a new cataloging was done
- ref: tags as a helper app
- Do we need a statistics app?
  - is this related to a need for a reporting app?
  - Could we use the action menu for this?
  - we hope to propose an ideal product for all conceivable permutations for what we really want
  - how might we use macro-express?
  - How to use keyboard shortcuts?
    - ideally: we would be able to use macros, use manual entry, and some obvious places when literals are needed
• We need a VISION document! (Laura Daniels)

Notes (5 Oct 2020)
• next meeting (oct 23, 2020)
• Cornell (LW) on the use of the 948 (indicators and subfields) for stats
• Do we not have a 'item created' date in the item record? Yes, in Admin data accordion of the item.
• Supposed to have 'date created'
• There are notes in the item that can be checked for 'staff only'
• need to better understand the Library Data Platform from reporting SIG (uses SQL)
• We need data like 'who' and maybe in what department or unit
• action: need to understand acquisitions workflows to better understand receiving (with orders already made and perhaps when receiving might involve when an order had NOT previously been added)
• Receiving admin metadata does not have notes either as well as no viewable admin info
• How to count RUSH cataloging?
• We need FOLIO to accommodate our need for local productivity data
• How to distinguish for batch processes
• keep in mind the API integrations for MARCedit

Notes (23 October 2020):
• How to use macros in OCLC to make records get to FOLIO, getting statistics from OCLC to FOLIO via export adnd then import (but no gateway is currently in development) / generating a daily file in OCLC and then load in data import…?
• While in the instance record, there is not a place to edit and put cataloging codes
• Can item notes for cataloging (for physical holdings)
• But we need instance or holdings for serials or eHoldings
• We are PROBABLY moving toward proposing a new element that should include all the things we might need (universally and locally)
  • we need a place to enter a place for the userID or a batch ID
  • See the 'Elements needed' section below
  • mapping some MARC tag to Instance and then making the instance records editable <the same element being proposed below>
    (but this mapping could be locally determined)
  • What about how to use ARL stats, etc?
  • LW will create a google doc for us to put together some needs for the element mentioned below

Notes (18 Sept 2020):
• For receiving, make sure to tick the box left of caption to receive it.
• Will need to know the number of items received in a period
• Receiving is pulling title information from inventory
• 'Note' is required in fast-add in Inventory

USE CASES