

# 2021-11-29 Reporting SIG Meeting notes

## Date

29 Nov 2021

## Attendees

Present?	Name	Organization	Present?	Name	Organization
x	Arthur Aguilera	University of Colorado, Boulder	x	Linda Miller	Cornell University
x	Sharon Beltaine	Cornell University		Nassib Nassar	Index Data
	Nancy Bolduc	Cornell University	x	Elena O'Malley	Emerson
x	Lloyd Chittenden	Marmot	x	Tod Olson	University of Chicago
regrets	Axel Doerrer	University Mainz	x	Jean Pajerek	Cornell University
	Shelley Doljack	Stanford University	x	Michael Patrick	The University of Alabama
x	Stefan Dombek	Leipzig University		Eric Pennington	Texas A&M
x	Jennifer Eustis	U. Massachusetts Amherst / Five College		Scott Perry	University of Chicago
x	Alissa Hafele	Stanford University	x	Natalya Pikulik	Cornell University
	Ingolf Kuss	hbz	x	Vandana Shah	Cornell University
	Kim Laine	Cornell University	x	Amelia Sutton	U. Massachusetts
	Joanne Leary	Cornell University		Simona Tabacaru	Texas A&M
x	Eliana Lima	Fenway Library Organization		Kevin Walker	The University of Alabama
x	Eric Luhrs	Lehigh University	x	Angela Zoss	Duke University

## Discussion Items

Item	Who	Notes
Attendance & Notes	Angela	<p><b>Attendance &amp; Notes</b></p> <ul style="list-style-type: none"> <li>• Today's attendance-taker: Linda Miller</li> <li>• Today's note-takers: Team Leads for project updates</li> </ul>
Announcements / Reminders	Angela	<p><b>Reporting documentation is live!</b></p> <ul style="list-style-type: none"> <li>• <a href="https://docs.folio.org/docs/reporting/">https://docs.folio.org/docs/reporting/</a></li> </ul> <p><b>Table conversion from LDP to Metadb</b></p> <ul style="list-style-type: none"> <li>• Working on a <a href="#">spreadsheet</a> that matches current LDP tables up with new Metadb tables, which should make it easy to convert existing LDP queries to work with Metadb</li> </ul> <p><b>Reporting SIG Holiday Schedule</b></p> <ul style="list-style-type: none"> <li>• Plan to cancel December 27 and January 3</li> </ul> <p><b>Recruiting New Query Developers</b></p> <ul style="list-style-type: none"> <li>• The Reporting SIG is always on the look-out for new query developers. Please let us know if you are interested in doing query development or if there are others at your institution who might be a good fit.</li> </ul>

Planning for WOLFcon 2022

Angela

Request to PC:

- WOLFcon 2022 planning underway - and we need SIG/Council input. August 31 through September 2 at Bucerius Law School in Hamburg, Germany. See slides for details. Need ideas for sessions; for instance, from community council: governance retrospective/discussion, quarterly community meeting, and budget and planning session. The early ideas can be rough; they are useful for people planning budgets. Thinking there should be sessions for developers, SMEs and SIG members, and library leadership. Add items to FOLIO at WOLFcon by December 1. Refinements will happen starting in December.

Some possible proposed sessions based on previous discussions:

Meeting Name	Description	Potential meeting length	Primary Group /SIG	Suggest by (your name /group)
Up and running with LDP (combine with Intro to FOLIO Analytics)	introductory demonstration of using SQL and the LDP app to query an LDP <ul style="list-style-type: none"> <li>demystifying LDP software, LDP database, LDP app, FOLIO Analytics, LDLite, Metadb</li> <li>mention hosting options (not a demo/tutorial)</li> <li>audience might be very broad, including administrators</li> </ul>	90	FOLIO community	Reporting SIG
LDLITE for open source FOLIO reporting: Intro to APIs; FOLIO data delivery via APIs; API-based FOLIO reporting; Reporting the API with LDLite	introductory demonstration of using LDLite to extract FOLIO data via API. session will showcase how to set up LDLite, how to use LDLite to extract different parts of the FOLIO data model, and how LDLite transforms FOLIO data so that it is easy to query using shared FOLIO Analytics queries. <ul style="list-style-type: none"> <li>maybe broaden to a bigger session on using APIs: idiosyncracies of some of the APIs</li> <li>talked about this in ERM, Axel is working on some interesting scripts for LDLite, but decided not to host in FOLIO Analytics, will have a separate repository</li> <li>API channel did talk about this, Intro to APIs; also, pros/cons of different software; what's good about using API vs. LDP vs. LDLite</li> </ul>	60	FOLIO community	Reporting SIG
Intro to FOLIO Analytics	walkthrough of the FOLIO Analytics query repository			
Implementing a reporting solution for FOLIO	panel discussion with people who have implemented any FOLIO reporting solutions (opportunity to give advice, answer questions) <ul style="list-style-type: none"> <li>Sharon willing to participate</li> <li>(Combine with below)</li> </ul>			
Reporting lessons from FOLIO implementers	variation on above theme; target FOLIO implementing institutions, and asked them about their lessons learned as regards reporting systems <ul style="list-style-type: none"> <li>Sharon willing to participate</li> <li>here's what we did (including hosting), here's what we learned</li> <li>maybe bring in someone who can talk about self hosting?</li> <li>hosting considerations</li> </ul>			
Hosting a reporting environment	<ul style="list-style-type: none"> <li>demo of hosting (Nassib?)</li> </ul>			
Maintaining a commitment to openness	A FOLIO community discussion to address issues of openness in our community. Where has FOLIO failed to maintain its commitment to openness? How can the community renew this commitment and improve openness? <ul style="list-style-type: none"> <li>commitment to open source</li> <li>commitment to transparency</li> <li>what are the implications of institutions reducing development contributions? how are vendors making the choice between development to support contractual obligations and the priorities set by the community?</li> <li>could divide into two: openness in communications, open source software development</li> <li>participation from councils, but also representatives from Reporting SIG</li> <li>one group to include might be documentation; how can we have documentation and transparency around changes to data model (e.g., in marc_srs, name of hrid and uid were suddenly changed to "external_"; SMEs were not notified; marc_srs is being developed without SMEs); as a community, how can we do better? what are the changes, and how do those get communicated?</li> <li>to what extent is FOLIO work being informed by change management/change control principles?</li> <li>do all vendors have the same approach to change management?</li> <li>how do data users learn about changes to data model/APIs; right now we just have to be watching the schemas</li> <li>does/should this happen in the sprint reviews? right now they seem focus on demos of functionality, so maybe encourage discussions of schema changes</li> <li>or maybe change should actually be proposed to the SIG and reviewed/approved</li> <li>marc_srs development should have SME input? SIG?</li> <li>should this be a WOLFcon session, or should it just be an issue raises to the councils soon? we could have a reporting subgroup to champion this work</li> <li>on December 2, IMM will be talking about marc_srs, how to get more info about how it's being developed and how changes are communicated, how it can be documented</li> <li>have this as something we discuss in a future SIG meeting to think about possible advocacy work</li> </ul>			

<p>Updates and Query Demonstrations from Various Reporting Related Groups and Efforts</p>	<p>Community &amp; Coordination, Reporting Subgroup Leads</p>	<p><b>Project updates</b></p> <p>Reporting development is using small subgroups to address priorities and complete work on report queries. Each week, these groups will share reports/queries with the Reporting SIG. Reporting development team leads are encouraged to enter a summary of their work group activities below.</p> <p><b>RA/UM Working Group</b></p> <ul style="list-style-type: none"> <li>• Getting back into query writing, will talk soon about whether to focus on metabd or keep going with new LDP queries</li> <li>• Angela will begin attending RA SIG meetings every two weeks or so to open the lines of communication</li> <li>• Contact Angela if you would like to join these meetings; first Wednesdays at 10am eastern</li> <li>• Context <ul style="list-style-type: none"> <li>• Meeting notes: <a href="https://docs.google.com/document/d/1UnzG64t917LOH2FtWhCEPISOnJWKL-0eu88Ouo1DU/edit">https://docs.google.com/document/d/1UnzG64t917LOH2FtWhCEPISOnJWKL-0eu88Ouo1DU/edit</a></li> <li>• Current status of RA/UM issues: <a href="https://github.com/folio-org/folio-analytics/issues?q=is%3Aissue+is%3Aopen+RA%2FUM">https://github.com/folio-org/folio-analytics/issues?q=is%3Aissue+is%3Aopen+RA%2FUM</a></li> </ul> </li> </ul> <p><b>MM Working Group</b></p> <ul style="list-style-type: none"> <li>• The zoom link for the meeting is <a href="https://umass-amherst.zoom.us/j/99254861410">https://umass-amherst.zoom.us/j/99254861410</a>. Usual FOLIO password. Our lab sessions are open to everyone. Please bring your questions, examples, and comments about reporting and metadata.</li> <li>• Meetings are 1st Tuesday of the month 12-1pm ET</li> </ul> <p><b>ERM Working Group</b></p> <ul style="list-style-type: none"> <li>• On going work on ERM data with LDlite</li> <li>• Rpt. "agreements by cancellation dates" <ul style="list-style-type: none"> <li>• Creation of new additional derived tables in MetaDB for orders and invoices / invoice lines necessary and useful with regard to reporting software solutions. This assumes that MetDB maintains the corresponding tables relationally. This is currently not the case. Therefore the creation is paused.</li> </ul> </li> <li>• Group will pilot to document this areas documentation on mermaid. <ul style="list-style-type: none"> <li>• Was suspended due to absence. First meeting on Nov. 30</li> </ul> </li> <li>• <a href="#">ERM Prototype and Query Development Status</a></li> <li>• Bi-weekly schedule (next meeting 7th, December 9:00 AM ET) <ul style="list-style-type: none"> <li>• <a href="#">Zoomlink</a> (password is the common zoom password in the FOLIO community)</li> </ul> </li> </ul> <p><b>RM Working Group</b></p> <ul style="list-style-type: none"> <li>• working on LDP to Metadb table mapping spreadsheet to prepare for transition to Metadb</li> <li>• subscription costs and subscription counts queries PR posted to folio-analytics</li> <li>• casting numbers: need to cast numbers related to finances as decimals, not money; money rounds up, which may throw totals off</li> <li>• looking at using <a href="https://mermaid-js.github.io/mermaid/#/">https://mermaid-js.github.io/mermaid/#/</a> to document data models in finance areas of FOLIO</li> <li>• exploring ways to make it easier to find options for reporting parameters in your LDP (e.g., a list of locations, item statuses, etc.)</li> <li>• several queries for RM completed, but still need documentation, testing, and review</li> <li>• for latest updates, see <a href="#">RM Prototype and Query Development Status</a></li> <li>• weekly meetings on <b>Thursdays at 9am ET on zoom</b> – contact Sharon Beltaine for zoom link and invitation</li> </ul> <p><b>Reporting SIG Documentation Subgroup</b></p> <ul style="list-style-type: none"> <li>• No changes</li> <li>• Additional Context <ul style="list-style-type: none"> <li>• Over the next few months, Reporting SIG Documentation Subgroup will be helping to build end-user documentation for <a href="https://docs.folio.org/docs/">https://docs.folio.org/docs/</a> (much will be linking to existing documentation over on GitHub)</li> <li>• see <a href="#">Reporting SIG Documentation Subgroup</a> and Guide to Reporting Documentation pages in this wiki</li> </ul> </li> </ul> <p><b>External Statistics Working Group</b></p> <ul style="list-style-type: none"> <li>• no updates currently</li> <li>• new organizational/tracking scheme for JIRA, with pointers to queries in folio-analytics repository</li> <li>• <a href="#">New organizational structure for External Statistics reports</a> <ul style="list-style-type: none"> <li>• external statistics reports (e.g., ACRL) typically require running queries from different functional reporting areas</li> <li>• these reports will be captured in JIRA under one UXPROD-XXXX report cluster issue, then the descriptions will point to each of the queries required to run them on the folio-analytics repository</li> <li>• institutions will need to rank each of these 8 new UXPROD-XXXX report cluster issues</li> <li>• each reporting development team will take responsibility for the queries in their area for the external statistics clusters</li> </ul> </li> </ul> <p><b>Product Council</b></p> <p>For all recent work on FOLIO Reporting SQL development:</p> <ul style="list-style-type: none"> <li>• <a href="https://github.com/folio-org/folio-analytics/commits/main">https://github.com/folio-org/folio-analytics/commits/main</a></li> </ul>
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Topics for Future Meetings	All	<ul style="list-style-type: none"> <li>• Follow-up on MARC status. Quickmarc/Data Import conflicts</li> <li>• How to strengthen connections to SIGs and their developers to be kept in the loop about changes to the data model</li> <li>• Show and tell       <ul style="list-style-type: none"> <li>• how are institutions using the LDP</li> <li>• examples of using the local schema</li> <li>• Cornell's report ticketing system</li> <li>• Rollout plans from institutions</li> <li>• Ask someone on the sysadmin side to talk about LDP administration (Jason Root?)</li> <li>• What is done in JIRA? (JIRA clean up)</li> </ul> </li> <li>• Training topics       <ul style="list-style-type: none"> <li>• adding test data in FOLIO snapshot</li> <li>• How to do ad hoc querying with the derived tables</li> <li>• How to use the LDP app</li> <li>• using <b>KNIME</b> to build reports (LDP edition)</li> <li>• use of local schema for custom tables</li> <li>• more on MARC (ask Jennifer)</li> <li>• using different applications (other than DBeaver)</li> <li>• Insomnia for API queries?</li> <li>• SQL</li> <li>• LDP to metadb</li> <li>• Metadb implications           <ul style="list-style-type: none"> <li>• if schema changes, will that be relatively seamless? old fields still in history, but new fields in current?</li> <li>• if fields are deprecated and removed, what happens if they come back again?</li> <li>• how will deleted records show up?</li> </ul> </li> <li>• GitHub</li> <li>• Panorama</li> <li>• LDLite (again?)</li> </ul> </li> <li>• Discussion:       <ul style="list-style-type: none"> <li>• how to rank clusters with institutional rankings going away?</li> <li>• consortia SIG is talking about a central office app of some kind; that app might need to deal with consortia-wide reporting</li> <li>• how to train:           <ul style="list-style-type: none"> <li>• wiki pages with examples? form a small project team? (e.g., how to pull from marc, how to use local schema)</li> <li>• each dev team create training about the data structures in that area?</li> </ul> </li> <li>• Query style (ask Nassib)</li> <li>• Gathering institutional query repositories; someone can propose a new page or a new addition to an existing page on FOLIO Analytics?</li> </ul> </li> <li>• Upcoming:       <ul style="list-style-type: none"> <li>• SQL advice/query optimization (Axel)</li> <li>• query demo - MARC (Tod)</li> <li>• Intro to SQL training (December 6 and 13 at least)</li> <li>• revisit discussion on openness/transparency in communication and open source software; decide as a group what we would like to advocate for</li> </ul> </li> </ul> <p>Review and update <a href="#">Topics for Future Reporting SIG Meetings</a></p>
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A test Action Item (Ingolf)