2023-06-01 Metadata Management Meeting notes

Date
01 Jun 2023

Attendees

Recordings

Recordings of meetings can be found in the Metadata_Management_SIG > Recordings folder on AWS from 2022 onwards: https://recordings.openlibraryfoundation.org/folio/metadata-management-sig/

Discussion items

<table>
<thead>
<tr>
<th>Notetaker</th>
<th>Alissa Hafele</th>
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<tr>
<td>Announcements</td>
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<td>PC update</td>
<td>Sharon Wiles-Young</td>
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2023-06-01 Product Council Meeting notes

Background documents:
- ARLEF Data Import Report, 2023-04-12
- EBSCO's Report to the ARLEF Report, 2023-04-24
- Report on Data Import, by Corrie Hutchison, 2023-05-05
- EBSCO's Update on Data Import Troubleshooting, 2023-05-23

Data Import (notes written up by Felix Hemme)

Goal: Make DI a reliable and stable tool for libraries.

Challenges reported by libraries

- Performance
- Reliability and scaling
- Troubleshooting failed records to import
- Quality
  - Defects identified and addressed too late in development
  - Environment configuration discrepancies
- Limited functionality
- System complexity
Product management slide:

- P1+P2 defects will be backported to Nolana and Orchid. Folijet is working on them right now.
- Currently no Jira Dashboard to follow the development, but there should be one. Once it has been created, Khalilah will share the board.
- Processing of large jobs still in design phase. Idea:
  - Split large jobs into smaller jobs
  - Run each small job
  - After a completed job run, check for the smallest job in the queue and run this one next
- What is the definition of a large job/load? Testing is done with record sets of 50k and 100k. 100k seems realistic, but 5,000 is not large by MM definition.
- Tod Olson: So “large” is a function of both record set size and complexity of import profile?
- Need a way to schedule large loads for off hours
- Question around how non-EBSCO hosted libraries are supported
- How are bugs prioritized? This should be transparent and Khalilah mentions this page: Defect Priority
  - Definition for Functional Issues
- Chicago mentions that they can’t wait for this work, as they are live for 1.5 years and need a working system. How is the process let people know when to expect what type of functionality?

Proposed phased approach

**Short-term (3 months)**
- In progress
  - Address critical production issues and deploy “xes to Nolana” / Orchid including
    - Continues to test and build around Nolana
    - Continues to test and build around Orchid
  - Complete documentation and release of Nolana and Orchid
  - Collaboration with Indexx data and self-hosted institutions
  - Provide realistic performance benchmarks
  - Define approach for addressing failed records and logging issues

**Proposed phased approach**

- Complete work that’s listed on the previous slide

**Proposed phased approach**

**Mid-term (3 months)**
- Review data import roadmap
- Continue architecture and infrastructure efforts to address challenges
- Development to address failed record(s) and logging issues

**Long-term (12 months)**
- Continue architecture and infrastructure efforts to address challenges
- Continue development efforts to address challenges

**Additional proposed actions**

- Miro board
Summary

- Improvements will take time
- Community involvement
  - Take a look at a proposed action from Miro board such as:
    - Feature and product design documents
    - Performance testing a vote and verify
    - Identifying critical paths
    - Evaluation of Jira products
    - DDA & integration enhancements
    - DOD & feedback
  - Can also possibly extend Poppy release to the current "U" release go-live date.

- Question about accountability; our group has been pointing out issues for years
- Omit Poppy release in Spring 2023 and move it to Nov. 2023 in order to have time to work on DI. Not decided yet.
  - Owen: This is a big decision to make so late in the release cycle and after the (extended) feature freeze for Poppy.

Extending Poppy Release to Go-Live date (Nov 2023)

New timeline

- Who will make the final call and when? There shall be a vote in PC

MM SIG discussion of PC Data Import meeting

- Recurring themes - concern about transparency, e.g. no Jira board; lack of trust in app; concern about short term vs. long term plan (see miro board) - we need some of these things now.
- Per Charlotte: The PC agenda has links to several documents, which were rework from ARLEF, and Corrie Hutchinson has gathered feedback from implementing libraries, and matched this with status on jiras.
- Suggestion to delay Poppy release came as surprise and would be very late decision. Unique scenario, but still concerns around it. Another option is the critical service patch path.
- Reminder: Data Import is used outside of app for e.g. single record import/overlay etc. Need to keep reminding because critical for daily operations, not just bulk data loading.
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<th>Jennifer Eustis</th>
<th>MM SIG Release Note &amp; Other Highlights</th>
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<td>• Please take a look. Metadata is lagging behind and we need participation from all to move things forward.</td>
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**Proposal for MARC bib rec templates functionality, continued**

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<tr>
<th>Magorzata</th>
<th>Open to do from 2023-05-25 Metadata Management Meeting notes: MOL Team will prepare mockups to visualize the proposal and present them next week.</th>
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<tbody>
<tr>
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<td><strong>Mockups demo</strong></td>
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|                 | • Settings - quickMARC - Templates  
• MARC bib, holding, auth templates  
• First to come is MARC bib  
• Click on template and right-side panel opens with search and table of templates with associated actions. Includes template usage info  
  • Action - tags opens additional Tag panel to add/remove  
  • Search by name  
  • Filter by source or tags  
• New button at top opens from to add new template  
  • Name, Description, MARC bib record, Admin data  
• Within MARC bib record additional Action menu - new, duplicate (opens search panel to look for existing templates), derive new (opens Inventory search to select instance), edit, view  
• Template edit screen opens with MARC showing - can collapse if needed |
|                 | **Questions/comments**                                                                                                                                 |
|                 | • Very happy to see development started  
• Duplicate action should be available from initial actions available in settings  
• Item templates? Templates are MARC only right now  
  • Charlotte: UX consistency could be easily achieved to expand out to items, instance (for those not cataloging in MARC) etc.  
• Does this need to be in settings? Settings is "off-limits" at some institutions  
  • Team thinks cataloging settings will continue to grow, e.g. MARC validation settings coming  
  • Laura in chat: I would expect in Inventory/qM to be able to select a template, but it makes sense to me to create/edit the templates in Settings  
• Problem is permissions administration of Settings, not that settings related tasks should be moved out of Settings  
• Rita: As I could not attend last week I must ask a silly question: what is he goal of those templates? To create new MARC records within FOLIO? Where are they stored? In SRS? e.g. Where are the records stored that are created by the templates? Is another step needed to "import" to folio?  
  • Instance generated at same time as SRS MARC record is created using template  
• Orphan SRS records a problem here? Will templates be stored in SRS and how will we distinguish between these and orphans?  
  • Needs to be considered  
  • Charlotte: we should think a bit about the architecture around this and where the records are store. Overview template would be useful. Magorzata will speak with developers |
|                 | **What are next steps?**                                                                                                                                 |
|                 | • Slack vote on Settings/Inventory with deadline. Magorzata will post. |

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<tr>
<th>WOLFcon session planning</th>
<th>all</th>
<th>Please add session ideas and proposals to this document: <a href="#">WolfCon 2023 MM SIG session ideas</a>. They can be in draft state!</th>
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|                          |     | Also consider topics from the [MM SIG Parking Lot](#)  
Go over the items in the list during the meeting and elaborate topics in order to submit the proposals.  
• [Minutes](#) from yesterday’s App Interaction meeting  
  • Many of interest to MM SIG folks, e.g. UX consistency, search behavior and advanced search |

Chat: