2023-07-13 Metadata Management Meeting notes

Date
13 Jul 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>Lynne Fors</th>
</tr>
</thead>
</table>
| Announcements | WOLFcon agenda has been released: https://wolfcon2023.sched.com/
Looking for Volunteers for MM apps to work on Documentation. Need at least one other person, preferably two (2) more people. Work is in spurts around the release of new flower version. Important for the community to have good documentation. Documentation Working Group is very supportive. Contact Laura Daniels if interested. |
### PC meeting agenda with notes

**Announcements:**
1. Group meeting on Monday, 7/17 to complete the [Dev Advocate proposal](https://wolcon2023.sched.com/).
3. The WOLFcon program is now out - [https://wolcon2023.sched.com/](https://wolcon2023.sched.com/), and
4. Auckland University (Michigan) has migrated to FOLIO (previously on Alma).

**SIG updates and Liaisons.** Clarification of responsibilities - being point of contact between PC and the respectively SIGs. Raise awareness and make sure highlighting the major activities in the PC, which will have interest or can affect the work in the SIG.

- Jennifer Eustis and Charlotte Whitt are the liaisons as they cover MM SIG and the subgroups.

### Update from the RMS Group (7/10/2023)

CSP = Critical Service Patch

Two issues approved for Nolana CSP #2:

New Slack channel for #release-management-stakeholder-group

Talk about the difference between the previously Bugfix process to the new Critical Service Patch process. When 2-3 CSPs have been released there will be a review of the process - maybe at the end of the year. The ideally goal would be 0 CSP per release.

**Critical Service Patch Process**

Two issues were approved for the Orchid CSP #3:

- MODINVOICE-477 - Invoice cannot be approved when balance is close to the encumbrance available balance - **AWAITING RELEASE**
- MODEXPW-422 - Resolve EDIFACT order export syntax errors - **IN REVIEW**

This issue has been pushed out and excluded from the Nolana CSP #2:

- MODSOURCE-659 - Implement async migration service (Nolana CSP Clone) - **IN PROGRESS**

### ISSUES AROUND TESTING WHEN THERE ARE CSP RELEASES

**AWS Cost Review group** - overview of the AWS cost needed. Wiki document is in process. Planning to do review once a month. Three members (KitFox, CC, and TC)

**WOLFcon 2023.** The topics for the council meetings on Friday 8/25/2023.

PC will have a meeting on 25 Oct 2023. Current topics are:

- Planning
- prioritization
- Work for the next 12-18 months

Items to add to agenda? Contact Charlotte Whitt or Jennifer Eustis
Discuss new MARC fields (and their inclusion into the default MARC2Instance mapping)

### Jennifer Eustis

**MARC Field Updates #33, 34, 35**

- 857 Electronic archive location & access
- 361 Structured ownership & custodial history
- 856 New Subfields & expanding to existing subfields which aren't currently present in FOLIO records (Update 35 and 34, [https://www.loc.gov/marc/up35bibliographic/bdapndxg.html](https://www.loc.gov/marc/up35bibliographic/bdapndxg.html), [https://www.loc.gov/marc/up34bibliographic/bdapndxg.html](https://www.loc.gov/marc/up34bibliographic/bdapndxg.html))
- 334 Mode of issuance (update 33)

Good to talk about as a group—where to put and if we need to add fields to the schema; also begs the question about how we handle MARC updates in an ongoing fashion—is there a basic process we should follow to monitor and think about?

**Chart of current MARC Bib-to-Inventory Instance default mappings**

Are we interested in including the new fields into the MARC to Instance Mapping? Are we interested in expanding the mapping for 856?

**334 Mode of Issue**

- LRM/new RDA treat mode of issuance very differently
- Previous decision to use the deprecated RDA values for mode of issuance
  - Currently populated from LDR position/byte 07
- Is there any reason to display the 334?
- Has anyone implemented the new RDA model?
  - Any PCC libraries? Rolling implementation between 2024-2027, could even be extended further into the future
  - Github
  - Decision: leave as is for now

**361 Structured ownership & custodial history**

- Structured format for 561 field (unstructured format)
- Map to Instance notes? Keep in source record?
- Field has been implemented in MARC Bibliographic, MARC Holdings, and MARC Authorities
- Very important to German libraries (GBV)
  - have a working group formed that is beginning to meeting next week and will add this to their agenda
- Lisa M. Furubotten: Isn't the whole reason for a structured note that you want to do queries? So what do you have to do to get this data into a table?
- Is this data important for reporting?
  - Lisa M. Furubotten: Yes. That is the reason for a structured field. If the reporting tables are coming off the instance fields, and you want this, then it implies you need the structured field into the instance just to get it into the tables? And I question whether you have to split it into different fields in the instance
  - Very dependent on what reporting tools a library is using
  - Decision: postpone and circle back later this Autumn

**856 New subfields & expanding to existing subfields which aren't currently present in FOLIO records**

- Christie: We could consider the 857 when expanding the properties of the electronic access block.
- Discuss at WolfCon 2023 in MM SIG working meeting

**857 Electronic archive location & access**

- Field could be a new type of Electronic Access, rather than a a new element entirely
- Use Electronic Access block in Inventory? 856 and 857?
  - Add a new dropdown: archive of resource or similar?
  - Indicators: are they the same from the 856?
  - Subfields are different from 856
- How much will it be used?
- Do we need a new data element?
- What are the use cases for including this in the instance data?

**Problem for UChicago: inability to suppress individual URLs; from discovery; staff only view ability like in Item records**

How do we handle MARC updates in the future? Changes to RDA? Bibframe? Other schema and standards?

- For a future meeting in parking lot
| Comprehensive review of the Instance data | Laura Daniels and the group | Clarify if there would be interest in this topic during the MM SIG working meeting at WOLFcon
Working meeting will be hybrid
Possible agenda items for the working meeting:
- review data elements in Inventory to see what is missing
- Changes to Electronic Access block
  - 856 and 857 fields
    - 856 new subfield expansion
    - 857 new field
- Changes/additions to Inventory data elements
- Repeatable call number field |
| Administrative notes and their location in Inventory records | Jennifer Eustis | 5C has been talking about position of administrative notes and propose to move them into an accordion.
At the moment it is in administrative data:

Defer to WolfCon 2023 working meeting |
| Templates for Inventory records | Laura Daniels | get thoughts on prioritization of templates as a solution to several issues, including display of elements an institution has chosen not to use and difficulty distinguishing between different record types when in edit view (in Inventory holdings and items)
- Came out of App Interaction SIG
- Would it make sense to prioritize the development of templates?
- Item records
- Concerns about consortia environments (5C)
- Templates would need user level defaults
- Orders templates have a way to hide fields they don’t use
- Ask for a demo on Orders template and what they can/cannot do
- Future meeting
- Customization at tenant level or templates? What's the priority?
- Where do templates fall in our priorities?
- Need to review or priority list |

**MM Dashboard with Bulk Edit**

**Chat:**

17:32:11 Von Felix Hemme an Alle:
Link to today’s agenda: [https://wiki.folio.org/x/Oq4MBw](https://wiki.folio.org/x/Oq4MBw)

17:33:39 Von Lynne Fors an Alle:
I can

17:33:48 Von Laura D (she/they) an Alle:
Reacted to "I can" with
17:35:49 Von Ros, Amanda L an Alle:
and the documentation WG is very supportive

17:36:02 Von Kathy Peters an Alle:
Reacted to "and the documentation..." with

17:36:09 Von Felix Hemme an Alle:
Reacted to "I can" with

17:39:00 Von Magorzata Gajkiewicz MOL an Alle:
Great news :)}
Thanks Jennifer and Charlotte!

it is great for MM to have 2 liaisons to PC

it is great for MM to have 2 liaisons to PC

https://wiki.folio.org/display/REL/Critical+Service+Patch+Process

https://wiki.folio.org/display/REL/Orchid+%28R1+2023%29+Release+Notes

MODINVOICE-477 - Invoice cannot be approved when balance is close to the encumbrance available balance Awaiting release

MODEXPW-422 - Resolve EDIFACT order export syntax errors In Review

This issue has been pushed out and excluded from the Nolana CSP 2:

MODSOURCE-659 - Implement async migration service (Nolana CSP Clone) In progress

@Ann-Marie - Sorry I missed it, what is the setting that needs to be adjusted if you have more than 1000 organization records?

@Ann-Marie - Sorry I missed it, what is the setting that needs to be adjusted if you have more than 1000 organization records?

And here's a table of the current default MARC Bib-to-Inventory Instance mappings: https://wiki.folio.org/display/FOLIOtips/Default+MARC+Bibliographic-to-Inventory+Instance+Mappings

I could see the 857 being mapped to a new type of Electronic Access (rather than a new element entirely)

I was thinking the same, especially if we enhance the URL fields

we don't have custom fields in Inventory at all, do we?

We have a ticket for adding custom fields in Inventory

Non public note
Will the inclusion of LOC as a Folio library really change what instance fields will be needed because they are BIBFRAME not MARC now?

18:03:33 Von Index Data an Alle:
UXPROD-2211 Custom Fields in Inventory (Draft)
18:03:54 Von Index Data an Alle:
That feature is not prioritized by LoC
18:05:25 Von Laura D (she/they) an Alle:
LRM/new RDA treat mode of issuance very differently (and I've been avoiding thinking about what changes we may need to make to address the new model)
18:05:26 Von Rita Albrecht an Alle:
We already had a discussion on 334
18:07:05 Von Felix Hemme an Alle:
Reacted to "LRM/new RDA treat mo..." with
18:08:04 Von Laura D (she/they) an Alle:
we need to keep in mind also that we're talking about the default mappings; we can always change our local mappings (assuming there's a place to map something to)
18:13:18 Von Alissa Hafele an Alle:
https://github.com/folio-org/data-import-processing-core/blob/5b92f76c90bbd2e3f90cbbaf267f6f50026b3c2a/src/main/java/org/folio/processing/mapping/defaultmapper/processor/functions/enums/IssuanceModeEnum.java
18:15:09 Von Christie Thomas (she/her) an Alle:
Thank you for finding that Alissa!
18:15:15 Von Alissa Hafele an Alle:
Reacted to "Thank you for findin..." with
18:15:34 Von Felix Hemme an Alle:
https://www.loc.gov/marc/bibliographic/bd361.html
18:18:45 Von Furubotten, Lisa M an Alle:
Isn't that Content in 361/561: is this anticipated to be the same, just unstructured/structured?
18:19:19 Von Furubotten, Lisa M an Alle:
Isn't the whole reason for a structured note that you want to do queries? So what do you have to do to get this data into a table
18:21:51 Von Laura D (she/they) an Alle:
so this data is important for reporting?
18:22:21 Von Furubotten, Lisa M an Alle:
Yes. That is the reason for a structured field. If the reporting tables are coming off the instance fields, and you want this, then it implies you need the structured field into the instance just to get it into the tables? And I question whether you have to split it into different fields in the instance
18:24:28 Von Laura D (she/they) an Alle:
Replying to "Yes. That is the re..."

so much depends on what reporting tool(s) one is using
18:31:59 Von Christie Thomas (she/her) an Alle:
We could consider the 857 when expanding the properties of the electronic access block.
18:32:07 Von Jennifer Eustis an Alle:
Reacted to "We could consider th..." with
18:32:16 Von Felix Hemme an Alle:
Reacted to "We could consider th..." with
18:32:19 Von Laura D (she/they) an Alle:
I am going to ask my same annoying question, what are the use cases for including this in the instance data?
18:32:50 Von Laura D (she/they) an Alle:
I think it should be an institutional decision.
18:33:22 Von Christie Thomas (she/her) an Alle:
But collecting use cases is important.
18:34:11 Von Laura D (she/they) an Alle:
I really like the idea of hashing out proposed changes to electronic access block in our time at WolfCon.
18:34:19 Von Christie Thomas (she/her) an Alle:
It was me.
18:34:27 Von Christie Thomas (she/her) an Alle:
Right!
18:34:40 Von Laura D (she/they) an Alle:
(as well as any other elements people would like to propose changes/additions to)
18:36:02 Von Felix Hemme an Alle:
Reacted to "I really like the id..." with
18:36:15 Von Jennifer Eustis an Alle:
Reacted to "I really like the id..." with
18:37:04 Von Felix Hemme an Alle:
Replying to "I really like the id..."

That seems really like a Topic that would Benefit from us being in a room together Brainstorming. Plus the option for people attending virtually
18:38:46 Von Christie Thomas (she/her) an Alle:
That is kind of what we are doing now.
18:41:14 Von Laura D (she/they) an Alle:
yes, how we handle updates in general is important to think about/decide
18:42:28 Von Rita Albrecht an Alle:
OCLC has not implemented 361 and 857 so far - I just looked it up
18:45:34 Von Laura D (she/they) an Alle:
and we can't assume all FOLIO implementers will be using MARC
18:47:58 Von Furubotten, Lisa M an Alle:
Sorry, is wolfcon going to be hybrid?
The MM working meeting will be hybrid

Replying to "The MM working meeti...

https://wolfcon2023.sched.com/event/1Oldp/metadata-management-sig-working-meeting

Virtual conference is free registration

Order templates have a way to hide fields, e.g. https://folio-snapshot.dev.folio.org/settings/orders/order-templates/create and "hide all eligible fields" then a little eyeball next to each field that can be used to hide/display

Yes, we definitely need to head toward user-level defaults. For Orders (at least right now), they are living without that option

Is there a difference in concept between templates, vs each user setting a default value that they choose? do you see the difference?

I do see a difference, though there are some similarities

To me, yes - setting default values = I have to pick one. Templates = if I'm a media cataloger, then I want my streaming video template vs streaming music template vs podcasts video, etc.

Reacted to "To me, yes - setting..." with