2023-11-02 Reporting SIG Meeting notes

Date
02 Nov 2023

Attendees

<table>
<thead>
<tr>
<th>Present?</th>
<th>Name</th>
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<tr>
<td>x</td>
<td>Arthur Aguilera</td>
<td>University of Colorado, Boulder</td>
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<td>Eliana Lima</td>
<td>Fenway Library Organization</td>
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<td>x</td>
<td>Sharon Beltaine</td>
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<td>Eric Luhrs</td>
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<td>Erin Block</td>
<td>University of Colorado, Boulder</td>
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<td>Lisa McColl</td>
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<td>Kathleen Moore</td>
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<td>Linda Miller</td>
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<td>Shannon Burke</td>
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<td>Nassib Nassar</td>
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<td>Suzette Caneda</td>
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<td>Elena O'Malley</td>
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<td>Dung-Lan Chen</td>
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<td>Lloyd Chittenden</td>
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<td>Tim Dannay</td>
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<td>Axel Doerrer</td>
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<td>Scott Perry</td>
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<td>Shelley Doljack</td>
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<td>Natalya Pikulk</td>
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<td>Stefan Dombek</td>
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<td>Emily Sanford</td>
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<td>Jennifer Eustis</td>
<td>U. Massachusetts Amherst / Five College</td>
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<td>Bob Scheier</td>
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<td>Corrie Hutchinson</td>
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<td>Jamie Jesanis</td>
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<td>Amelia Sutton</td>
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<td>Jeanette Kalchik</td>
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<td>Simona Tabacaru</td>
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<td>Kevin Kishimoto</td>
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<td>Huey-Ning Tan</td>
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<td>Vitus Tang</td>
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<td>Alexander Lao</td>
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<td>Irina Trapido</td>
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<td>Joanne Leary</td>
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<td>Catherine Tuohy</td>
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<td>Harry Kaplanian</td>
<td>EbSCO</td>
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<td>Joseph Molloy</td>
<td>Spokane Public Library</td>
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Discussion Items

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<tr>
<td>Attendance &amp; Notes</td>
<td>Scott</td>
<td><strong>Attendance &amp; Notes</strong></td>
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<td>• Today's attendance-taker: Linda (or substitute)</td>
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<td>• Today's note-takers: Team Leads for project updates</td>
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Impacts of New Fields and Features

- Are there any new fields or features we should know about from any of the functional areas that may impact reporting?
  - New
    - We will be getting new data fields for the Open Access app - more details coming
    - Timezone format is not consistent across the tables in FOLIO, which impacts LDP and Metadb
      - Nassib confirmed that he does not change timezone settings as part of the ETL with the LDP/Metadb software, so whatever is in FOLIO is what we get in LDP/Metadb
      - RFC-3339 sitting with TC about always representing times as an ISO date format [https://github.com/folio-org/rfc/s3339](https://github.com/folio-org/rfc/s3339)
    - Invoices will have a fiscal year assigned. You will be able to process an invoice in a past fiscal year (with Poppy) and in a future fiscal year (after Poppy)
  - From Recent Meetings
    - There is a proposal to deprecate the donor field in the POL and replace it with an Organization type of donor in Quesnelia. This will also be linked to inventory in a future release as well.
    - (Jennifer Eustis) from MM: proposal for a new field for item source (New field in the item record: Source ID - Functional analysis)
    - (Stefan Dombek) feature with Orchid: in the module audit, we have logs for orders and order lines and snapshot for create, edit, and delete records (unfortunately not for fiscal year rollover, just create/edit/delete; need to know the date of your FYO and then report based on that) (UXPROD-3216 - Display a history of edits for the Order and Order line records [CLOSED])
    - (Jennifer Eustis) request for more helpful info when there are duplicate UUIDs during data import (MDEXP-625 - Report affected instance when export contains negative number of failed records [CLOSED])

Upcoming meeting topics (tentative)

- Reporting Development in Preparation for Poppy Release
- Reporting Experiences from Various Institutions
- Reporting App demonstration
- Metadb Updates for January 2024

(Slightly Changed) FOLIO Analytics 1.7 Poppy Development and Review Schedule

- Oct 27 EOD: Last day to submit new Pull Requests for 1.7 Poppy release of Folio Analytics.
- Oct 30 - Nov 3: Review Board completes review of all 1.7 code.
- Nov 6 - Nov 10: Code fixed by report development teams per review board feedback.
- Nov 10 - EOD: Feature Freeze.
- Dec 1: Folio Analytics 1.7 is released.

*Nov 20 - FOLIO Application Poppy is released

Any new members?

- Welcome/introductions

How to find our latest recordings

- Recording details available on our Reporting SIG Meetings and Notes page and Query Development Meetings page

SIG Recruitment

We will need to be recruiting for a variety of roles in the coming months. Please consider whether you would be interested. Reach out to Scott Perry or Sharon Beltaine with any questions.

- Representative for the Documentation Working Group
- Query developers - possibly from Index Data?
- FOLIO Analytics Review Board
### Reporting Rollout at University of Colorado, Boulder

Arthur Aguilera

Arthur will offer a presentation and discussion on the FOLIO reporting rollout at University of Colorado, Boulder.

- went live June 2023 with FOLIO, new VueFind, and Metadb reporting database
- migrated from Sierra
- contracted with Index Data for hosting
- task force “reporting pod” for FOLIO Reporting was created and has been working on reporting for the past 2 years
- pod learned SQL, surveyed reporting needs, and created 100+ queries; steep learning curve, but new skills beneficial to reporting staff
- now looking to create permanent reporting group for all library data needs
- created 3 types of reports: self-service reports, automated and scheduled reports, ad-hoc reports
- manage issues in a github project board
- reports stored on a github repository
- created tracks and numbering schemas to categorize reports
- dashboards created with Power BI (there is a free version that is easy to learn and it can be embedded into a Sharepoint site)
- reports delivered as PowerBI dashboards or Excel files with data
- created reports for historical data that are static
- scripts create local tables in Metadb and report writer points to table from Power BI to create dashboard

### Development Focus: Getting ready for the Poppy Release

Scott Perry and Sharon Beltaine

Development Focus: Getting ready for the Poppy Release

- see current issues on folio-analytics
- see current pull requests on folio-analytics
- see [https://github.com/folio-org/folio-analytics/wiki](https://github.com/folio-org/folio-analytics/wiki) for Changes by Release notes
- see FOLIO Analytics Review Board for information on query reviews for the Poppy release
- second meeting of Review Board - all Pull Requests assigned for review
- wiki updates for 1.7 Poppy Release
- questions?

### Documentation Subgroup Updates

Eliana, Alex, Sharon

The FOLIO Reporting SIG Documentation Subgroup has been preparing updates to the Reporting section of the FOLIO documentation at docs.folio.org

- see [https://docs.folio.org/docs/](https://docs.folio.org/docs/)
- LDP1 and LDP2 references all changed to just “LDP”
- “LDP Query Builder App” section updated to “Reporting App”
- Many updates to Reporting App section
- Reminder: We could use one or two volunteers

### Recurring Items (Updated weekly, but not always discussed in meeting)

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| Review of In-Progress Projects (Recurring) | Eliana, Alex, Sharon | • Build a directory of extracted and derived tables  
• Build Metadb query cookbook-style documentation  
  • has been opened and sent to the development teams for planning/prioritization  
  • haven't settled on a style exactly, but have some examples  
• Build Training Program for FOLIO Data Model  
  • ACQ/ERM drafts have been presented and will be updated  
• Port LDP1 derived tables to Metadb  
  • possibly done??  
• Recruit from new institutions not represented  
  • recommend that the development teams reach out to SIGs for an update, invite new members |
| Review the release notes for FOLIO Analytics, LDP1, LDLite, LDP Reporting App, ldpmarc, Metadb Projects (Recurring) | | • LDP1 release notes  
• Metadb release notes (via tags)  
• LDLite release notes (via tags)  
• ldpmarc release notes  
• LDP Reporting App release notes (mod-ldp, ui-ldp) and JIRA issues (mod-ldp, ui-ldp)|
| Updates and Query Demonstrations from Various Reporting Related Groups and Efforts Projects (Recurring) | Community & Coordination, | |
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.

MM/RA/UM Working Group
- Leadership transitioning to Christie Thomas
- Meetings to be held on the 2nd Wednesday of the month at 12:00 PM ET
- see the folio-mm-ra-um channel on the Metadb slack for more information
- Meeting notes: https://docs.google.com/document/d/1PdG0xmi_VeYvWf0VfoQjd1GWIAZdBVHVI4DAVwupP-q/edit

ERM Working Group
- Current topic
  - Reporting for the FOLIO App Open Access
- Meetings are bi-weekly on tuesdays 11am ET alternating with ACQ Working Group
  - Next meeting will be at 7th, Nov
- Contact Stefan Dombek if you would like to get a calendar invitation
- Meeting Recordings are here: FOLIO ERM-RM Report Dev Teams

ACQ Working Group
- group is working with ERM group on ACQ-ERM FOLIO Data Model Training
- group is working on ACQ-related (Acquisitions) derived tables for the next Folio-Analytics release
  - see ACQ Derived Tables to Convert from LDP1 to Metadb
- for latest query development updates, see RM Prototype and Query Development Status
- Meetings are biweekly on Tuesdays 11am-noon ET; contact Sharon Beltaine if you would like a calendar invitation
- Meeting Recordings are here: FOLIO ERM-RM Report Dev Teams

Reporting SIG Documentation Subgroup
- Orchid documentation is live on https://docs.folio.org/docs/
- Poppy documentation is in development
- Additional Context
  - The Reporting SIG has representation on the Documentation Working Group, which is building end-user documentation for https://docs.folio.org/docs/ (mostly linking to existing documentation over on GitHub)

D-A-CH Working Group (D-Reporting)
- Ongoing topics
  - Onboarding training
  - DBS statistics
    - JIRA-issues, Rpt-Clusters
    - Gap analysis to statistic codes, user counts etc.
    - Identifying functions that we need for statistics in Germany but are not yet implemented in FOLIO
- Meetings
  - Next meeting will be at 8th, Nov
  - Contact Stefan Dombek if you would like to get a calendar invitation

Product Council
- (December 8 meeting) PC shared a report of the SIG check-ins
- would love for PC to check-in yearly

For all recent work on FOLIO Reporting SQL development:
- https://github.com/folio-org/folio-analytics/commits/main