

MM/RA/UM Meeting Notes

2024-01-10

- Questions and queries:
 - Understanding the source of the data and the tables.
 - Understanding the cross joins and json extract path syntax for metadb.
 - Use API documentation to see schema and their properties.
 - <https://dev.folio.org/reference/api/>
 - In Metadb - main tables and transformed tables have different forms of the same name.
 - For instance, the main tables have modeofissuanceid as a property and the transformed table has mode_of_issuance_id as the property name. Why the difference?
 - Can we confirm the difference between main and transformed tables? Which ones would you suggest to use?
- Announcement and updates from members
 - Maybe we need to combine all of the meetings and groups? With the ERM / Acq group. Would like to know more about the other groups. Even meeting as a larger group occasionally would be useful.
 - KK - Stanford does not have a shared repo for queries,
 - CT - UChicago does not have a github repo either.
 - NP - Cornell has a [GitHub repo](#) for queries and a directory to the queries in their [Confluence wiki](#).
- Brainstorm queries that we could be working on as a group.

2023-12-13

- Questions:
- Thoughts about the function of this meetings.
 - Nicer to meet with a smaller group to chat out problems. But, this is dependent on people having something to talk about.
 - Likes to keep touch with what is going on in this area.
 - Use this time to look at queries and try to write some general queries for the reporting app. (+1)
 - Did we want to adapt any reports that were created previously?
 - See [RA/UM query spreadsheet](#)
 - [Folio Analytics - SQL for report queries](#)
 - [LDP Derived Tables](#)
 - We could also discuss reports we are creating at our institutions to see where there are commonalities.

- Of the LDP report queries - are the queries that are present being used? Which ones?
 - Comment that most of the time start from scratch with queries. So, good as a reference, but the actual use of a query as is not what people generally use.
 - What about the cookbooks?
 - Is that a source?
 - Can the reporting app queries be more custom with more parameters.
 - Be more of a workshop for each of building queries that are local?
 - [Using dashboards in Tableau]
 - Are there more apps in FOLIO that are coming online that we need to look at in this group?
 - Authorities / BibFrame storage
 - What are the canned reports that are supporting authorities?
 - Looking forward to automating or operationalizing clean-up and embedding the reports in these workflows.
 - Next meet on 1/10/2023
 - Next steps - review sources of queries for potential query development for the reporting app. Check in with ERM / Acq subgroup about writing queries for the reporting app.

2023-11-08

- Updates from the Reporting SIG?
 - Possibly merge all subgroups in the new year?
 - Have more of a lab session?
 - SB will schedule a meeting with CT, SD, SB + SP.
- Questions:
 - Follow-up: question about created_date and metadata_created_date in the user_users table.
 - Follow-up: title level vs item level requests. New report required?
 - New questions?
- Reporting App (Poppy)
 - Metadb FOLIO User Group
 - Next meeting, Dec 6 @ 10 Am EDT
 - Focus: tutorial on the basics of writing reports for Metadb and the FOLIO Reporting App.
 - DM Nassib Nassar in the Metadb slack space if you would like to attend.
 - FOLIO reporting App (Poppy)
 - [Recording](#) from a recent App Interaction SIG meeting
- Issues that need to be completed:
 - NB: We missed the deadline for Poppy pull requests.
 - [MM- add effective shelving_order fields from inventory_items to item_ext derived table for LDP1 #759](#) - has been assigned to Christie Thomas. Still TBD.

- [MM - port item effective callno components to Metadb #755](#) - has been done; needs pull request.

2023-10-11

- Questions about queries:
 - Question posted in slack: Hi everyone. [@Joanne Leary](#) and I are working on counting users by patron group using LDP1. We need to count user records created within a given date range. On the user_users table, we see created_date and metadata__created_date. These fields show different dates for the same record. Which field is the actual date the user record was created?
 - API documentation for users suggests that createDate has been deprecated, but in the LDP user_users table has both a createDate and Metadata created date.
 - Potentially one is the date of the first creation of the record and the other is the equivalent of an updated.
 - Christie will ask a colleague at Chicago; and Sharon will check in with a colleague at Cornell to see if there is any more information.
 - Question about the item derived table to add the shelving order.
 - See issue: <https://github.com/folio-org/folio-analytics/issues/759>
 - Can we work on making this update in this meeting?
 - Question about title level vs item level requests.
 - Need to create a report that identifies all requests made on resources in a specific location.
 - Request table has the item id for item level requests and the instance id for title level requests. Could use derived instance-holdings-item table to get the temporary item location when instance id is present.
- LDP release notes (Sharon B.)
 - Starting with 1.5 notes have been moved to the wiki.
 - <https://github.com/folio-org/folio-analytics/wiki/Changes-by-Release>
 - Should record changes made in preparation for Poppy here.
 - Right now the plan is to continue to do rolling releases, but this may change.
- LDP app in Poppy
 - Now called the reporting app.
 - Will the Reporting App point to LDP1/2 and Metadb or just Metadb. Will need to work with Nassib and Corrie on this.
 - Will be a project level repository that we could work to populate. (folio-analytics)
 - Will also be able to point to a local repository.
 - Reports can also be parameterized.

- Timeline? Bigger question - what is it that our group needs to do for Poppy? Don't know the merge dates for Poppy yet. Reports can be added to the repository at any time.
- Maybe need to focus on folio-analytics for now.
- Issues - what needs to be done for Poppy.
 - RA/UM
 - Individuals will go through and close issues that have been completed.
 - MM
 - <https://github.com/folio-org/folio-analytics/issues/759> - assigned to Christie
 - <https://github.com/folio-org/folio-analytics/issues/755> - has been done. Needs to be closed with the pull request.

2023-09-13

- Reminders:
 - New meeting schedule: Second Wednesday of every month at 12:00 PM ET.
 - Zoom info and Calendar notice are available here: <https://wiki.folio.org/display/RPT/Query+Development+Meetings>
 - [cookbook page for querying MARC](#)
 - Maybe we can add an Inventory Cookbook?
 - Hardest things to find -
 - Item statuses
 - Who updated a record and when?
 - Maybe need to work on metadb cookbooks.
 - Maybe create some FAQs from newcomers?
- Continue to think about the goals of this group.
 - How can in production users learn from each other?
 - How can we support new implementers?
- Update from the reporting SIG?
 - Derived tables in Metadb
 - Combining development meeting with the reporting SIG meeting on Mondays.
 - Have someone from this group provide an update on what is going on in this group. Discussions about derived tables and documentation amongst the broader reporting community.
 - Schedule for Reporting SIG - <https://wiki.folio.org/display/RPT>
- Query Workshop -
 - Questions or queries to put to the group?
 - (This should be the first question asked at the meeting.)
 - Question about in house use report.
- Review: [MM/RA/UM UXPROD Clusters not done](#)
 - Should we leave these behind? Is it worth going through
- Notes - Stanford live and using metadb.

- Sharon - Have been working on derived tables but question about what to about these in the future.
- Suggestion to look at derived table work and take that on .
 - Include the open issues in Github.
- Real time derived tables are coming to metadb.
 - All MM derived tables have been converted to metadb. Pretty sure that RA/UM have been transformed, but we need to check on the status of this. (Yes, they have!)
 - Can we audit this? There is a spreadsheet tracking the conversion of the tables.
 - <https://docs.google.com/spreadsheets/d/1efLc6QMjyGuXyQM26pZbti-B6wFhJuZt7s7FJbhdXYo/edit#gid=0>
- Do we need to qualify that the cookbooks are LDP centric? Maybe switch over and start focusing on metadb.
- Sharing queries-
 - Maybe a wiki page? See for example:
 - https://wiki.koha-community.org/wiki/SQL_Reports_Library
 - Cornell is sharing on github: <https://github.com/cul-it/cul-folio-analytics>
- Also ask if there are any changes to FOLIO that are going to impact LDP or metadb.
 - Maybe this needs to be an activity that we think through for each FOLIO release?
 - How does the community keep track of dependencies between FOLIO releases and the LDP updates? How is what changes in FOLIO analytics tracked? In the wiki there are the beginnings of trying to record these changes by tag or by month.

2023-08-10

- Review JIRA issues
 - [MM/RA/UM UXPROD Clusters not done](#)
- Update on [cookbook page for querying MARC](#)
- To be discussed:
 - Future of this group past August
 - Does it meet?
 - Could meet as needed, if there is an agenda; don't have to get rid of it completely
 - That's a nice way to do things; hard to see how it might work, but if some topics come up, could schedule informal sessions
 - Could use slack to organize ad hoc teams when a specific topic comes up
 - Does it have a leader?

- Christie Thomas from UChicago! Thank you so much!
 - What schedule makes sense (frequency and timing)
 - Where should we send a poll?
 - LDP/Metadb slack, also emails from people attending today
 - ~~Angela will collect emails, include previous poll responses~~
 - ~~Angela can mention in SIG meeting as well~~
 - Deadline next Friday (August 18)
 - Housekeeping (creating a new Zoom link)
 - Once we have a new time, Angela can reach out to Peter
 - Early the week of the 21st
 - ~~Angela will cancel old meeting series~~
 - Christie can potentially set up a new recurring meeting
 - More JIRA issues
 - Porting a more complex query from LDP to Metadb
- Lists app
 - Will the SIG have things to discuss about this app? Will SIG have actions to take as a result?
 - Sharon has asked them to demo the tool in SIG meeting, probably not until after WOLFcon. Could also look into attending WOLFcon sessions
 - <https://corsair-frm.int.aws.folio.org/>
 - LDP query builder app only works for LDP1 institutions
 - Lists app supposedly doesn't hit the production database, has a separate data lake
 - EBSCO is maybe also creating their own proprietary version of LDP (not announced yet)
- Automation options
 - Cornell uses DBeaver to run queries on a schedule and push the Excel files to Box automatically
- Thinking ahead to Metadb, derived tables won't be regularly updating
 - Don't want to join constantly updating tables with nightly tables like the derived tables
 - Also less efficient to join to both transformed and untransformed, would be better to pull everything from untransformed
 - There is a transaction table you can reference, if you are savvy; you could build a check against the transaction table to see if the record has changed since the derived table was created

2023-07-11

- Question: new coding style (<https://github.com/folio-org/folio-analytics/pull/779>)
 - Question for Nassib:
 - **Is this valid for LDP as well? Or just Metadb?**
- Question: what to do with Metadb reports that don't return results
 - Ask query developer to help adding test data

- **Note: need to check with Nassib about Metadb server being down**
- Question: difference between main and current tables in Metadb queries
 - With “__” at the end, the table includes both historical and current records
 - The versions with just current records don’t show up automatically in DBeaver, you have to look under partitions (but you can query them automatically anyway)
- Discussion
 - Querying MARC
 - **Angela to ask Natalya/Vandana for Cornell’s MARC queries**
 - Using Views for reporting
- News:
 - Wellesley has LDP now!
- Review JIRA issues
 - [MM/RA/UM UXPROD Clusters not done](#)
- To be discussed:
 - future of this group past August
 - More JIRA issues
 - Porting a more complex query from LDP to Metadb

2023-06-13

- Duke announcement
- Review JIRA issues
 - [MM/RA/UM UXPROD Clusters not done](#)
 - [REP issues for MM/RA/UM](#)
 - Ideas for cookbook:
 - Query to identify records where a particular MARC subfield is missing
 - Query to show how to parse the leader (substring based on position for the leader)
 - Concatenating across subfields that are split into multiple rows (e.g., 703)
 - **TO DO: create a GitHub issue that describes a single cookbook entry for MARC queries and lists these as variables [Natalya/Vandana?]**
 - **Cornell may have content that can be repurposed; once the issue is created, possibly attach a PDF of the Cornell page to the issue in GitHub**
- One more LDP1 derived table needs to be ported to Metadb:
 - [Item_effective_callno_components](#)
 - Have an issue: <https://github.com/folio-org/folio-analytics/issues/755>
 - ~~TO DO: assign the issue~~
- Need to do more work on feesfines_accounts_actions tables
- Course Reserves derived tables
 - Eliana has shared an instructors query
 - Need to run them by RA SMEs
- Comments projects

- Should we be systematic about listing and assigning these?
- Outreach to SIGs
 - Recent SIG discussion emphasized importance of this
 - can we start scheduling outreach sessions with RA, UM, and MM SIGs?
 - No one here is currently attending these SIGs
 - Vandana open to this idea, maybe we can ask Joanne as well
 - MM - plan to present MARC cookbook when it is ready, not sure who would do this

2023-05-09

- Question: do we have SchemaSpy for LDP1 or Metadb database structures?
 - We do!
 - Metadb - <https://metadb.dev/schema/folio/>
 - LDP1 - <https://metadb.dev/ldp1/schema/public/>
 - Also a schema parser in Google Sheets: [📄 FOLIO Schema parser](#)
- Organizing our activities
 - What would be helpful?
 - Have part of the meeting dedicated to a lab session
 - what connects to what
 - where you can find information (including, how can we find or create this data in FOLIO)
 - learn what types of queries people are writing
 - E.g., annual statistics, swap notes
 - Important to have discussions around, e.g., the “derived tables”; this is how we can contribute things that people with LDP1 or Metadb can benefit from
 - Also, we can discuss changes that are coming in FOLIO (e.g., bound-withs)
 - Useful to have a mixed group, we can learn more about different areas of the data
 - Make some progress on query writing for community needs
 - Any complex topics that have been hard to resolve over time?
 - Got a question today, some data in LDP doesn't look the way we expect; could we bring those questions here?
 - **Angela: Maybe blend the MM and RA/UM Slack channel on Metadb Slack**
- Possible projects:
 - Adding comments to derived or public tables
 - Hardest part is coming up with descriptions for fields, so we could even just task people with that
 - [📄 Comments for LDP Tables](#)
 - Preparing for upcoming data model changes (like bound-width)
- Example projects:

- Course Reserves derived tables
 - Advice: look for the number of referenced IDs without the name