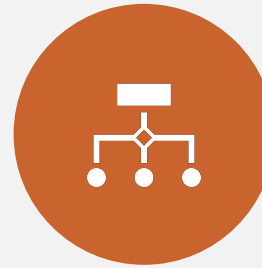


# FOLIJET – QUESNELIA OVERVIEW

# AGENDA



UXPROD-4709: Refine processing of Modify action for MARC Bib records



UXPROD-4471: Remove step of initial saving of incoming records to SRS



UXPROD-4303: Set instance/bib record for deletion



UXPROD-2742: MARC-MARC matching enhancements: Narrowing multiple matches & Bug work

UXPROD-4709: REFINE PROCESSING OF MODIFY  
ACTION FOR MARC BIB RECORDS

## UXPROD-4709: REFINE PROCESSING OF MODIFY ACTION FOR MARC BIB RECORDS

- Moved processing of Modify action from SRS to mod-inventory to align with changes in UXPROD-4471 and remove post-processing step
- Removed saving the modified incoming record in SRS when Modify is placed in the beginning of the Job Profile
- Ensured that Modify placed at the end of the Job Profiles acts on existing Instance (and underlying MARC Bib)
- Allowed placing Modify action before a MARC-MARC match
- Refined and documented scenarios that are currently supported  
<https://folio-org.atlassian.net/wiki/spaces/DD/pages/1778826/3.+Modify+MARC+BIB>

# SUPPORTED MODIFY SCENARIOS I

- Modify action was originally designed to be applied on the incoming MARC Bib record before mapping any other entities
  - To ensure such behavior it should be placed at the beginning of the Job Profile.
- However, Modify action can also be applied at the end of the Job Profile, following actions on MARC Bib/Instance
  - In these scenarios Modify will affect existing record that was acted upon in the context of the Job.

## Modify incoming MARC + create Instance

### ^ Summary

#### Name\*



Modify incoming MARC + create Instance



#### Accepted data type\*

MARC

#### Description

### ^ Overview

Action profile: "Modify MARC" ·  Modify MARC bibliographic 

Action profile: "Create Instance" ·  Create instance 



## SUPPORTED MODIFY SCENARIOS 2

- Modify action was originally designed to be applied on the incoming MARC Bib record before mapping any other entities
  - To ensure such behavior it should be placed at the beginning of the Job Profile.
- However, Modify action can also be applied at the end of the Job Profile, following actions on MARC Bib/Instance
  - In these scenarios Modify will affect existing record that was acted upon in the context of the Job.

### Create Instance + Modify MARC Bib

#### ^ Summary

##### Name\*

Create Instance + Modify MARC Bib

##### Accepted data type\*

MARC

##### Description

#### ^ Overview

🗑️ Action profile: "Create Instance" · 🛠️ + Create instance



🗑️ Action profile: "Modify MARC Bib" · 🛠️ Modify MARC bibliographic



# SUPPORTED MODIFY SCENARIOS 3

- Modify action was originally designed to be applied on the incoming MARC Bib record before mapping any other entities
  - To ensure such behavior it should be placed at the beginning of the Job Profile.
- However, Modify action can also be applied at the end of the Job Profile, following actions on MARC Bib/Instance
  - In these scenarios Modify will affect existing record that was acted upon in the context of the Job.

## Modify + Match and update Instance

^ **Summary**

**Name\***  
Modify + Match and update Instance

**Accepted data type\***  
MARC

**Description**

^ **Overview**

Action profile: "Modify MARC Bib" · Modify MARC bibliographic

Match profile: "Match 001 to Instance HRID" · Instance · Instance → -

^ **For matches**

Action profile: "Update Instance" · Update instance

+  
+  
+

^ **For non-matches**

This section contains no items

+  
+

# SUPPORTED MODIFY SCENARIOS 4 & 5

## Update Instance + Modify MARC Bib 1

### ^ Summary

#### Name \*

Update Instance + Modify MARC Bib 1

#### Accepted data type \*

MARC

#### Description

### ^ Overview

Match profile: "Match 001 to Instance HRID" · Instance · Instance → -

#### ^ For matches

Action profile: "Update Instance" · Update instance

Action profile: "Modify MARC Bib" · Modify MARC bibliographic

+

#### ^ For non-matches

This section contains no items

+

+

## Update Instance + Modify MARC Bib 2

### ^ Summary

#### Name \*

Update Instance + Modify MARC Bib 2

#### Accepted data type \*

MARC

#### Description

### ^ Overview

Match profile: "Match 001 to Instance HRID" · Instance · Instance → -

#### ^ For matches

Action profile: "Update Instance" · Update instance

+

#### ^ For non-matches

This section contains no items

+

Action profile: "Modify MARC Bib" · Modify MARC bibliographic

+

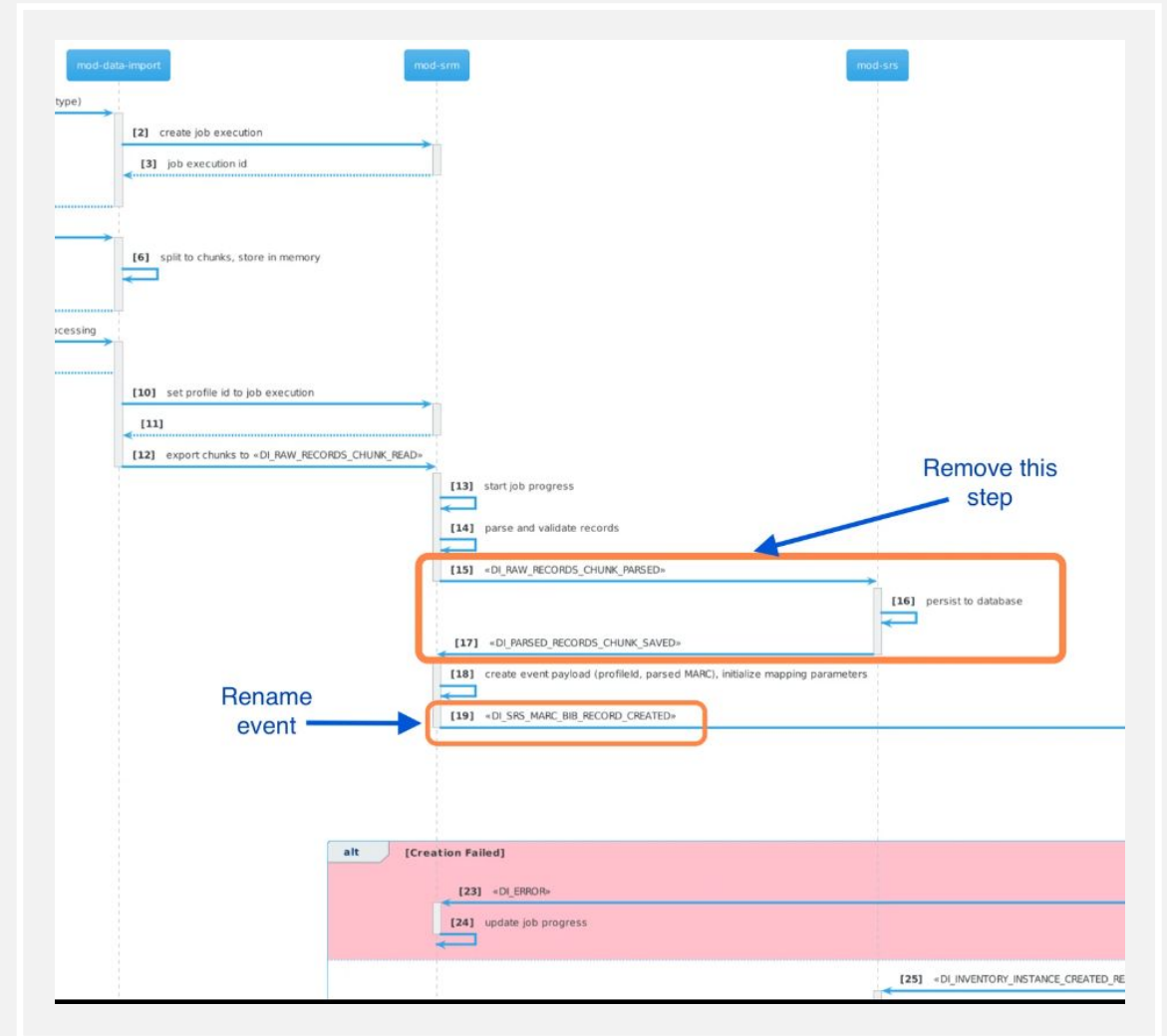
In these particular cases, Modify can also be placed either inside the Match block following other actions or outside the Match block; Modify will be processed in the same way.



UXPROD-4471: REMOVE STEP OF INITIAL SAVING  
OF INCOMING RECORDS TO SRS

## UXPROD-4471: REMOVE STEP OF INITIAL SAVING OF INCOMING RECORDS TO SRS

- MARC SRS creation now occurs specifically at Create Instance action, rather than at the start of all import jobs. This means SRS MARC no longer saved unless necessary per Job profile.
- Implementing this work is expected to lead to improvements in DI performance
  - Create scenarios are simplified
  - Update scenarios should benefit from quicker search if SRS DB is not piling up clutter.
- ‘Incoming record’ tab now available on Data Import Log to show incoming record details even when no SRS MARC is saved.
- Documentation:  
<https://folio-org.atlassian.net/wiki/spaces/FOLIJET/pages/1401468/SPIKE+-+Design+approach+for+differentiating+incoming+MARC+Bibs+that+should+shouldn+t+be+saved+in+SRS>



# INCOMING RECORD TAB – DATA IMPORT LOG

[Data import](#)

[Agreements](#)

[Bulk edit](#)

[Check in](#)

[Check out](#)

[Circulation log](#)

[Courses](#)

[Data import](#)

[Data export](#)

[Dashboard](#)

[eHoldings](#)

[Apps](#)

[?](#)

[Online](#)

Import Log for Record 11 (Letters from a Stoic : The Ancient Classic / Seneca, with a introduction of Donald Robertson.)

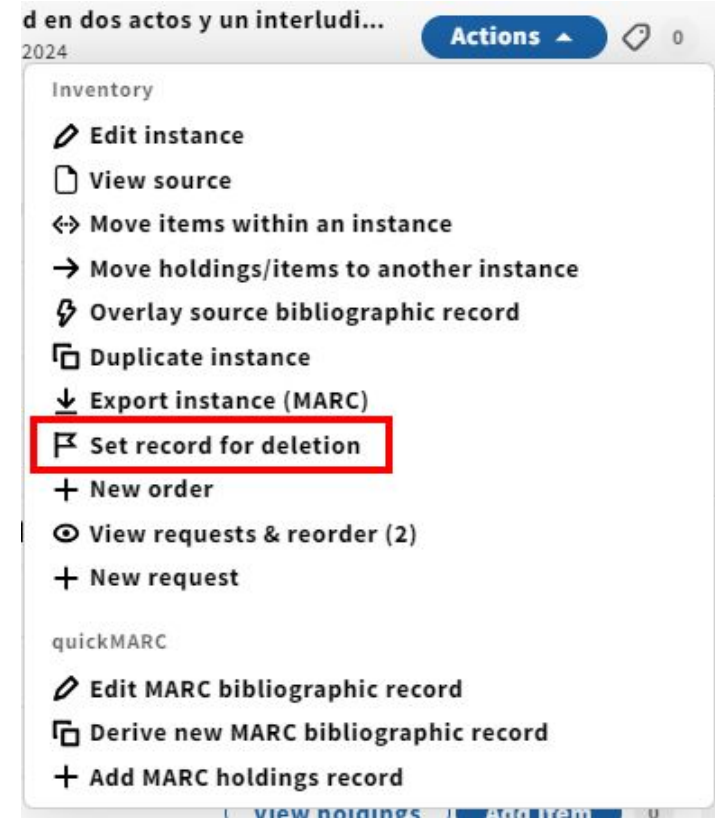
Show: [Incoming record](#) [SRS MARC](#) [Instance](#) [Holdings](#) [Item](#) [Authority](#) [Order](#) [Invoice](#)

```
{
  "leader": "01636nam a2200397ii 4500",
  "fields": [
    {
      "001": "ebc6509400"
    },
    {
      "003": "NhCcYBP"
    },
    {
      "005": "20210317031033.2"
    },
    {
      "006": "m o d "
    },
    {
      "007": "cr |n|||||||"
    },
    {
      "008": "210311s2021 enk ob 001 0 eng d"
    },
    {
      "020": {
        "subfields": [
          {
            "a": "9781119751434"
          },
          {
            "q": "electronic book"
          }
        ]
      },
      "ind1": " ",
      "ind2": " "
    }
  ]
}
```

**UXPROD-4303: SET INSTANCE/BIB RECORD  
FOR DELETION**

## UXPROD-4303: SET INSTANCE/BIB RECORD FOR DELETION

- Added Instance-level action (3<sup>rd</sup> pane) named “**Set record for deletion**”
- Access controlled by new permission: **Inventory: Set records for deletion**
  - New permission is separate from, and not included in, existing ‘Inventory: All permissions’
- ‘Soft delete’ only for Instances/MARC Bibs for initial release
- Further enhancements and iterative work toward ‘hard deletes’ to come in future releases



# USING 'SET RECORD FOR DELETION'

The screenshot displays the 'Inventory' system interface. On the left, there is a search and filter sidebar with options like 'Effective location (item)', 'Language', 'Resource Type', 'Format', 'Mode of issuance', 'Nature of content', 'Staff suppress', 'Suppress from discovery', 'Statistical code', 'Date created', 'Date updated', 'Instance status', and 'Source'. The main area shows a table of records with columns for Title, Contributors, and Publishers. The selected record is 'Anne Sexton: teacher of weird abundance / Paula M. Salvio; with a foreword by Madeleine R. Grumet'. On the right, a detailed view of this record is shown, including 'Instance record (text)', 'Transformations /by Anne Sexton; with drawings by Barbara Swan.', 'Holdings' information, 'Administrative data' (Instance HRID, Source, Cataloged date, Instance status term, Instance status code, Instance status source), 'Mode of issuance' (Monograph), 'Statistical code type', 'Statistical code', 'Administrative note', and 'Title data' (Resource title).

Confirmation modal displays:

- You have chosen to set [title of instance] for deletion. When a record is set for deletion, the instance will be Suppressed from discovery and Staff suppressed. If the instance source is MARC, then the MARC LDR 05 will be set to "d"

Upon confirmation, the following updates are applied:

- Instance-level:
  - Staff suppressed flag is set to 'true'
  - Suppress from discovery flag is set to 'true'
- SRS-level (if Source=MARC):
  - Suppress from discovery flag is set to 'true'
  - deleted set to true
  - LDR 05 is set to "d"

Once the changes are saved a success message banner is displayed:

- [Instance title] has been set for deletion

If an error occurs the error message banner is displayed:

- [Instance title] was not set for deletion

The screenshot shows the 'Inventory' search interface. At the top, there is a search bar with 'Search & filter' and a back arrow. Below the search bar are two tabs: 'Search' (active) and 'Browse'. Underneath are three filter tabs: 'Instance' (active), 'Holdings', and 'Item'. A search input field contains the placeholder text 'Keyword (title, contributor, identifier, HR)' and a search button. Below the search bar are 'Reset all' and 'Advanced search' buttons. A list of facets is shown, including 'Held by', 'Effective location (item)', 'Language', 'Resource Type', 'Format', 'Mode of issuance', 'Nature of content', 'Staff suppress', 'Suppress from discovery', 'Statistical code', 'Date created', 'Date updated', 'Instance status', 'Source', and 'Tags'. The 'Staff suppress' facet is highlighted with a red box and shows two options: 'No' (checked, 49) and 'Yes' (unchecked, 17).

Facet	Option	Count
Staff suppress	<input checked="" type="checkbox"/> No	49
	<input type="checkbox"/> Yes	17

## STAFF SUPPRESS FACET UPDATES

- "Inventory:View instance records being suppressed for staff" permission was renamed and reconfigured as **Inventory: Enable staff suppress facet**
- This permission was detached from 'Inventory: All permissions'
  - Only users with a need to access Staff suppressed instances will be able to see the facet
- Inventory search was updated to default Staff suppress facet to 'No' to help keep suppressed records out of the results for the average FOLIO user

## SET RECORD FOR DELETION – POTENTIAL FUTURE ENHANCEMENTS –

‘Set for deletion’  
Inventory-level marker  
(a la Suppress from  
discovery and Staff  
suppress)

Option for deleting  
attached Holdings &  
Items when setting an  
Instance for deletion

Batch deletion – Select  
multiple Instances for  
Deletion in Inventory

MARC   Instance  
synchronization  
enhancements to  
support deleted  
records

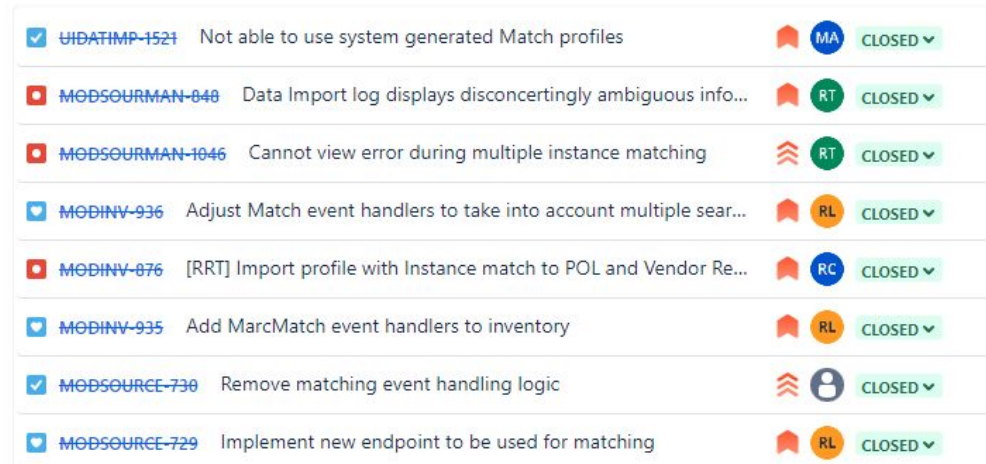
Hard deletes



UXPROD-2742: MARC-MARC MATCHING  
ENHANCEMENTS: NARROWING MULTIPLE  
MATCHES & BUG WORK

## UXPROD-2742: MARC-MARC MATCHING ENHANCEMENTS: NARROWING MULTIPLE MATCHES & BUG WORK

- Moved processing of MARC-MARC match from SRS to mod-inventory to optimize processing of subsequent matches
- Allowed for MARC-MARC multiple match result to be narrowed down by a subsequent MARC-Instance match or a static value sub-match
- Ensured MARC-MARC can be used as a base match for subsequent match on Holdings and Items
- Fixed bugs and made adjustments related to match processing (e.g. allowed for matching by POL/VRN of Orders in statuses other than Open)
- Updated system to allow Default Inventory Single Record Match profiles to be viewable and linkable to Job profiles, but not editable.



<input checked="" type="checkbox"/>	<a href="#">UIDATIMP-1521</a>	Not able to use system generated Match profiles		CLOSED
<input type="checkbox"/>	<a href="#">MODSOURMAN-848</a>	Data Import log displays disconcertingly ambiguous info...		CLOSED
<input type="checkbox"/>	<a href="#">MODSOURMAN-1046</a>	Cannot view error during multiple instance matching		CLOSED
<input checked="" type="checkbox"/>	<a href="#">MODINV-936</a>	Adjust Match event handlers to take into account multiple sear...		CLOSED
<input type="checkbox"/>	<a href="#">MODINV-876</a>	[RRT] Import profile with Instance match to POL and Vendor Re...		CLOSED
<input checked="" type="checkbox"/>	<a href="#">MODINV-935</a>	Add MarcMatch event handlers to inventory		CLOSED
<input checked="" type="checkbox"/>	<a href="#">MODSOURCE-730</a>	Remove matching event handling logic		CLOSED
<input checked="" type="checkbox"/>	<a href="#">MODSOURCE-729</a>	Implement new endpoint to be used for matching		CLOSED

THANK YOU