



Fragen rund ums Metadatenmanagement

April 11, 2019

Charlotte Whitt
Index Data

Metadata Management (bibs, holdings, items, authorities,)

- Data Import
- Original Cataloguing
- Copy Cataloguing
- Data Clean up

Topics

- The overall infrastructure for metadata management
- Metadata management
 - 2019
 - 2020 ...
- What is Inventory
 - Interaction
 - Other FOLIO apps



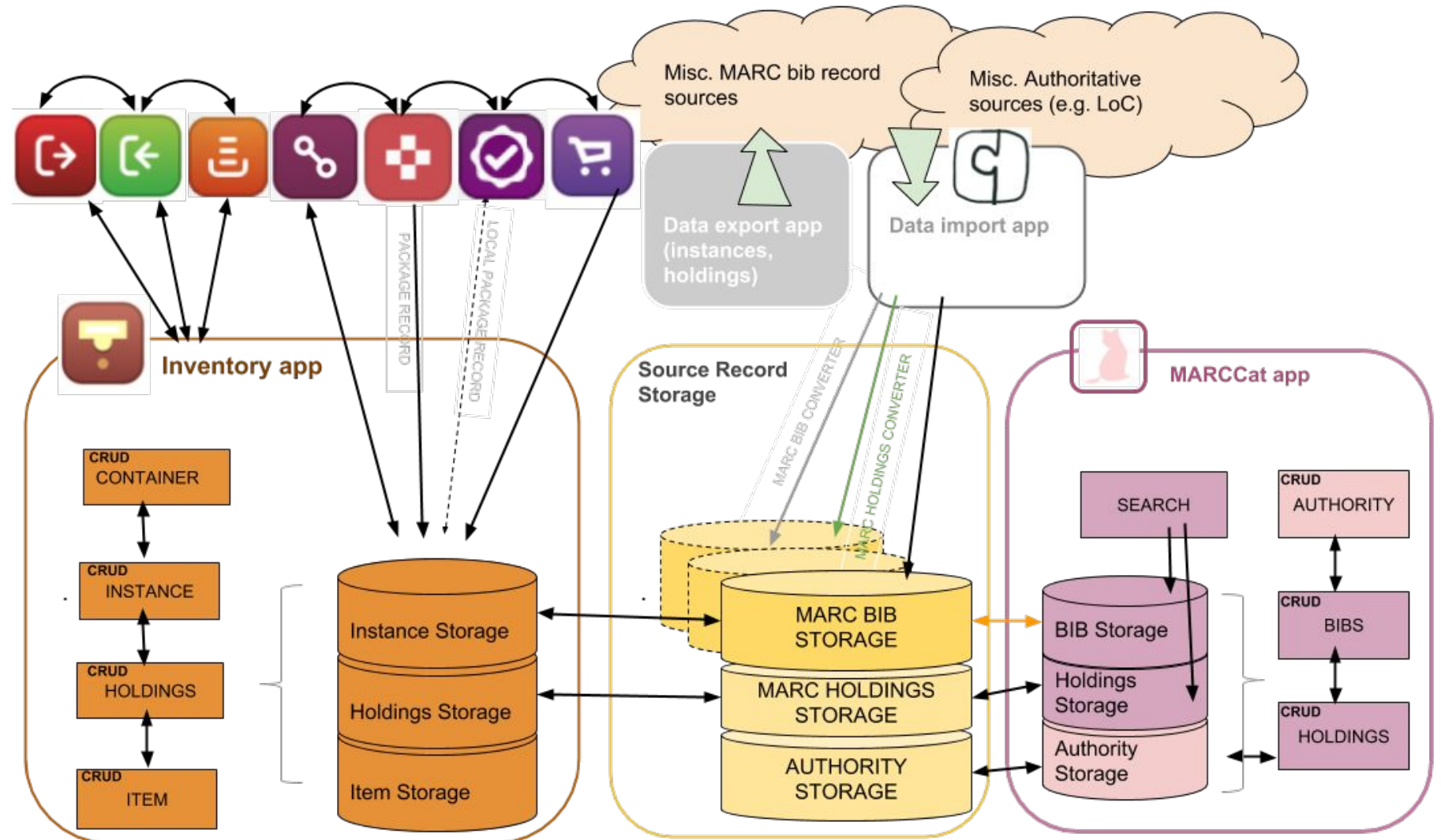


Metadata Management environment

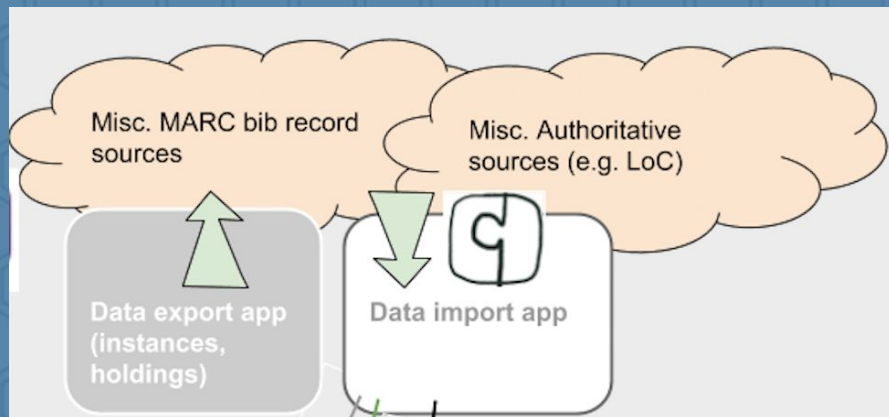
Infrastructure

Check out
Check in
Codex Search
eHoldings
ERM
Order

Data Import
MARCCat w.
Authority control



Data import



Data Import is the UI and backend engine that allows for the upload/ingest, matching, actions, and mapping of incoming records.

DONE

- File Upload functionality
- File staging area
- File Extension settings
- Parsing the files

IN PROCESS

- UI to manage the data import process
- Establish SRS-Inventory integration
- Define Job, Matching, Action, Data Mapping profiles

NOT STARTED

- Create, Overlay/Update/Merge, and Delete records
- Establish SRS-MARCcat integration
- Preview before committing the load
- In-app import reports/logs: success & errors



FOLIO Snapshot - *DONE*

[\(22 min demo video\)](#)

← → ↻ ⚠ Inte säker | folio-snapshot-stable.aws.indexdata.com/data-import

Appar IndexData Calender Index Data tools FOLIO FOLIO Environme... System Dashboar... UXPROD FEATUR... Slack - FOLIO

Data import Check out Check in Inventory Requests Codex search Users Data import eHoldings

Jobs Manage

Previews

Authority updates · import7.marc
112984432 · Triggered by John Doe
680 records · Ended 11/21/2018 12:38 AM
Ready for preview [Preview now](#)

Standard BIB Import · importBIB017.marc
222984498 · Triggered by Caleb Hunter
250 records · Ended 11/21/2018 12:01 AM
Ready for preview [Preview now](#)

Authority updates · import8.marc
112974998 · Triggered by John Lennon
760 records · Ended 11/20/2018 11:50 PM
Ready for preview [Preview now](#)

BIB Import from Boston · importBoston.marc
143274991 · Triggered by Taylor Edwards
710 records · Ended 11/20/2018 11:50 PM
Ready for preview [Preview now](#)

Marc jobs · import_159.mrc
182984219 · Triggered by Mark Anderson
2,519 records · Began 11/20/2018 2:56 PM
In progress 51%

Library indexing · import_102.mrc
182982989 · Triggered by Marie Curie
2,284 records · Began 11/20/2018 2:50 PM
In progress 94%

Logs View all

File name	Job profile	Import ID	Ended running
import_28.mrc	Multilingual support check	23391	11/11/2018, 2:10
import_22.mrc	Standard BIB profile	20091	11/5/2018, 2:21 P
import_20.mrc	BIB profile with customized Holdings	18591	11/5/2018, 1:08 P
import_23.mrc	Marc bib jobs	21091	11/5/2018, 10:59
import_18.mrc	Annual registry update profile	17091	11/3/2018, 2:20 P
import_15.mrc	Pearson new data	14250	11/3/2018, 1:47 P
import_17.mrc	Standard BIB profile	16150	11/3/2018, 11:40
import_13.mrc	FOLIO Default	52250	11/3/2018, 11:22
import_12.mrc	Standard BIB profile (Instances only)	11250	11/3/2018, 10:03
import_16.mrc	Thomson Reuters standard	15150	11/2/2018, 12:45
import_11.mrc	Simple BIB profile (description update)	10556	11/2/2018, 12:15
import_6.mrc	Obsolete BIB profile for backward compatibility	58906	11/2/2018, 10:20
import_7.mrc	New Holdings (Beta.2 Use carefully)	68551	11/2/2018, 10:18
import_14.mrc	Charlotte`s Core Case with Fixes	13250	11/2/2018, 10:05
import_21.mrc	BIB profile with new Holdings & Items	19091	11/1/2018, 7:01 P
import_19.mrc	Outdated! DO NOT USE (Just Special Cases!)	18091	11/1/2018, 3:21 P
import_10.mrc	Standard BIB profile	91124	11/1/2018, 1:33 P
import_9.mrc	Standard BIB profile	81123	11/1/2018, 11:12
import_5.mrc	Standard BIB profile with fixes for Items (HU)	48906	11/1/2018, 10:37
import_4.mrc	MIT Orders	47906	11/1/2018, 10:12
import_8.mrc	Marc BIB-001 Jonathan test	75671	11/1/2018, 10:09
import_24.mrc	New Holdings (Beta.2 Use carefully)	22091	10/31/2018, 5:40
import_25.mrc	Standard BIB profile (2019 Q1 Beta test)	27091	10/31/2018, 4:33
import_26.mrc	Semi-Valid test profile (NYPL Check)	23191	10/31/2018, 12:3
import_3.mrc	Christie`s profile for CPL	33112	10/30/2018, 12:4

End of list

Import

← → ↻ ⚠ Inte säker | folio-snapshot

Appar IndexData Calender Index Data

Data import

Files

UalabamaNonRomanAuth.mrc
3/11/2019

End of list

File upload already in progress

1 file uploaded

Resume

Delete files

FOLIO snapshot - *DONE*



Data import

Check out

Check in

Inventory

Requests

Codex search

Users

Apps

Jobs

Manage

Logs

View all

Import

25 latest uploaded files

Jobs

Running

Library indexing · import_idx_unq.mrc

637483981 · Triggered by Preston Walker

445 records · Began 12/21/2018 10:50 AM

In progress

100%

Library indexing · import_indexes.mrc

128890210 · Triggered by Preston Walker

571 records · Began 12/21/2018 9:55 AM

In progress

100%

Library indexing · import_idx_332.mrc

441098214 · Triggered by Preston Walker

825 records · Began 12/21/2018 9:33 AM

In progress

100%

Logs

View all

	Import ID	Ended running↓	Run by
	23391	11/11/2018, 2:10 PM	Ozz
	20091	11/5/2018, 2:21 PM	Ellic
Holdings	18591	11/5/2018, 1:08 PM	Jay
	21091	11/5/2018, 10:59 AM	Jacl
ile	17091	11/3/2018, 2:20 PM	Ami
	14250	11/3/2018, 1:47 PM	Osc
	16150	11/3/2018, 11:40 AM	Ada
	52250	11/3/2018, 11:22 AM	Con
ces only)	11250	11/3/2018, 10:03 AM	The
	15150	11/2/2018, 12:45 PM	Eli
ion update)	10556	11/2/2018, 12:15 PM	Osc
kward	58906	11/2/2018, 10:20 AM	Mar
arefully)	68551	11/2/2018, 10:18 AM	Yeh
Fixes	13250	11/2/2018, 10:05 AM	Don
gs & Items	19091	11/1/2018, 7:01 PM	Bra
t Special	18091	11/1/2018, 3:21 PM	Kin

Import

Drag and drop to start a new data import job

or choose files



Data Import UX prototype

UI to create a new job - *IN PROCESS*



https://ux.folio.org/testing/data-import/new-job/

Appar IndexData Calender Index Data tools FOLIO FOLIO Environme... System Dashboar... UXPROD FEATUR... SI

Data Import

Cancel

New job

Save

Name

Description

Accepted data type

MARC



Matches & actions

Add ▼



Data Import UX prototype - *IN PROCESS*

Settings job profiles

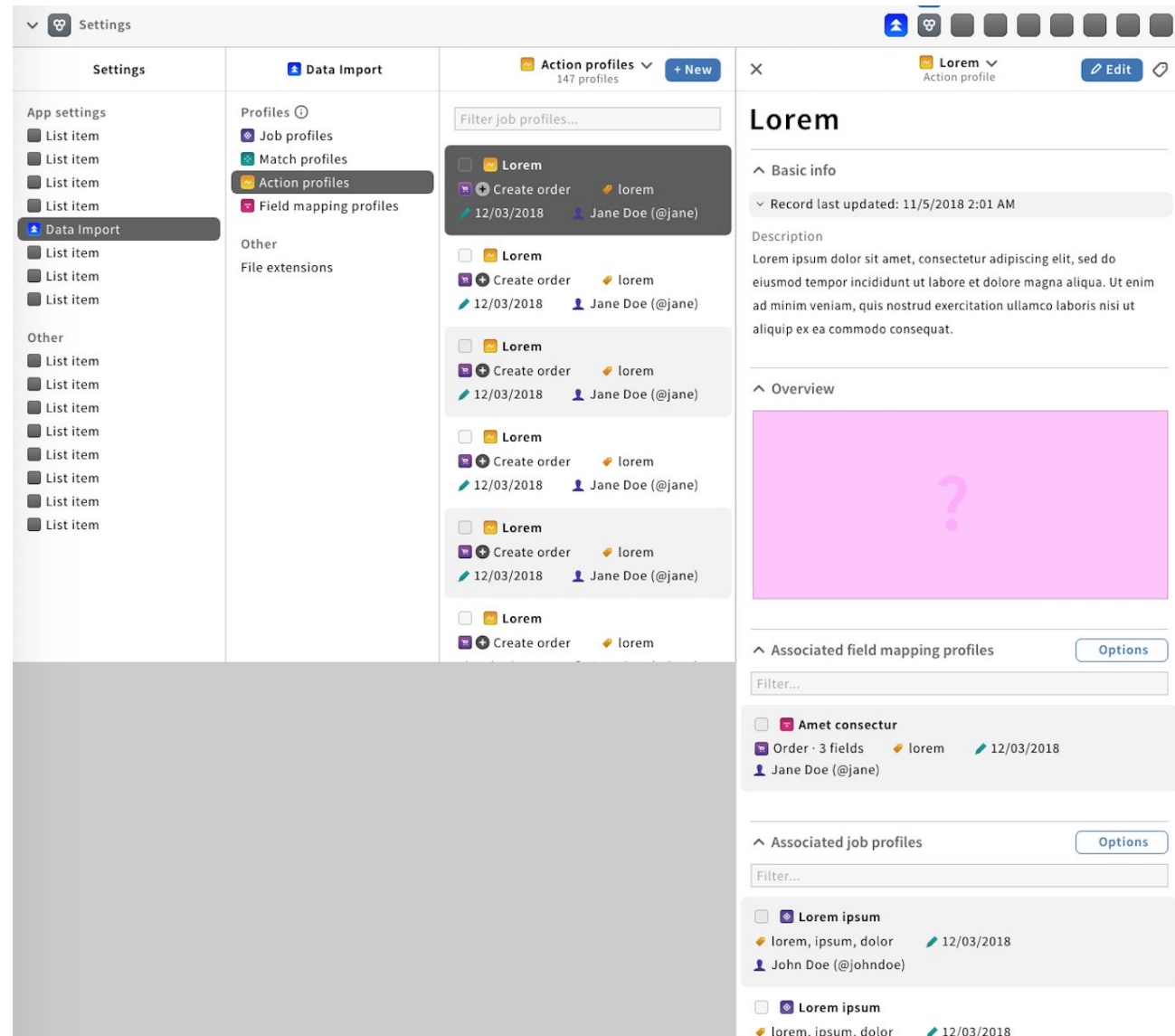
[illegible]



Data Import UX prototype

Settings action profiles

- *IN PROCESS*

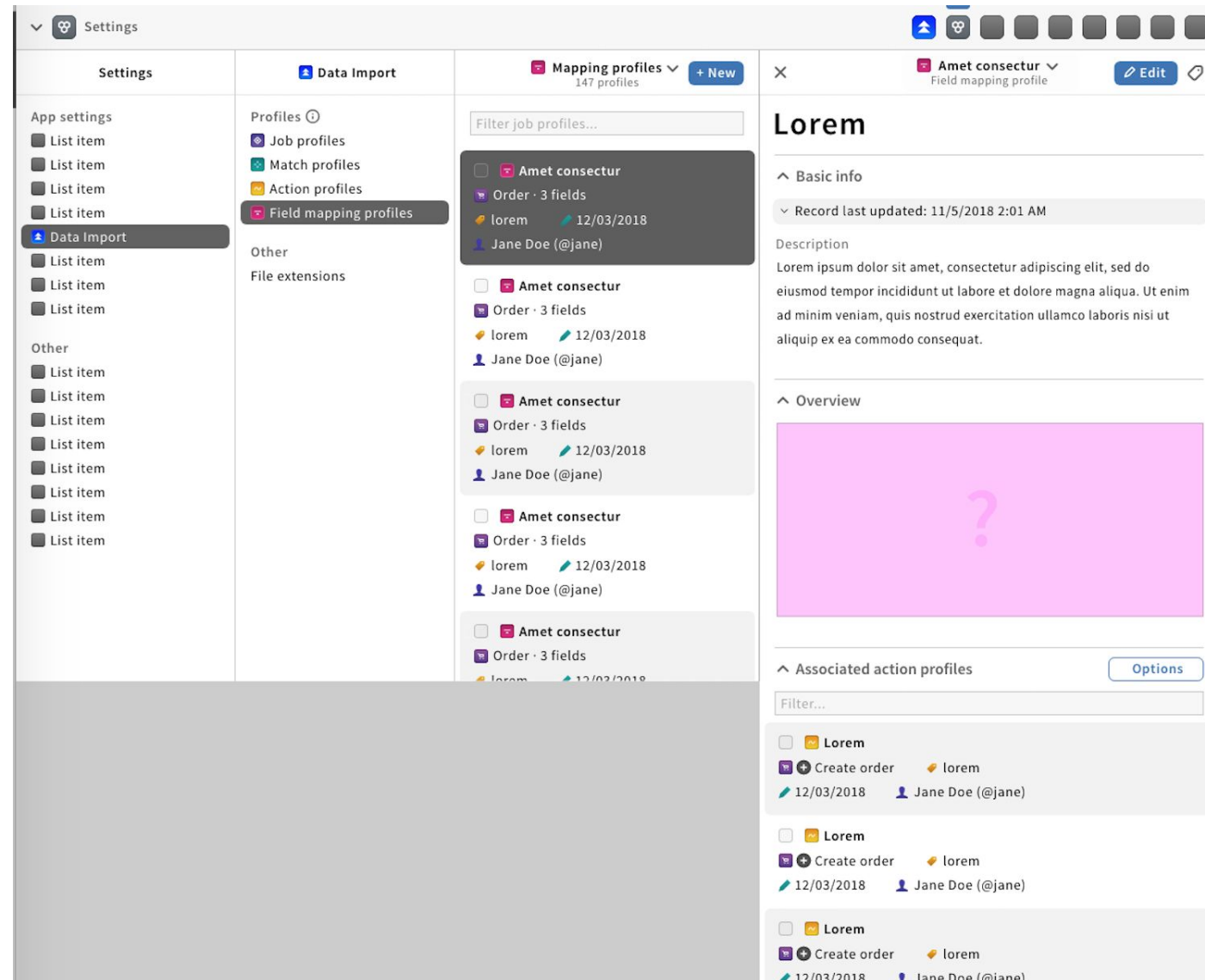




Data Import UX prototype

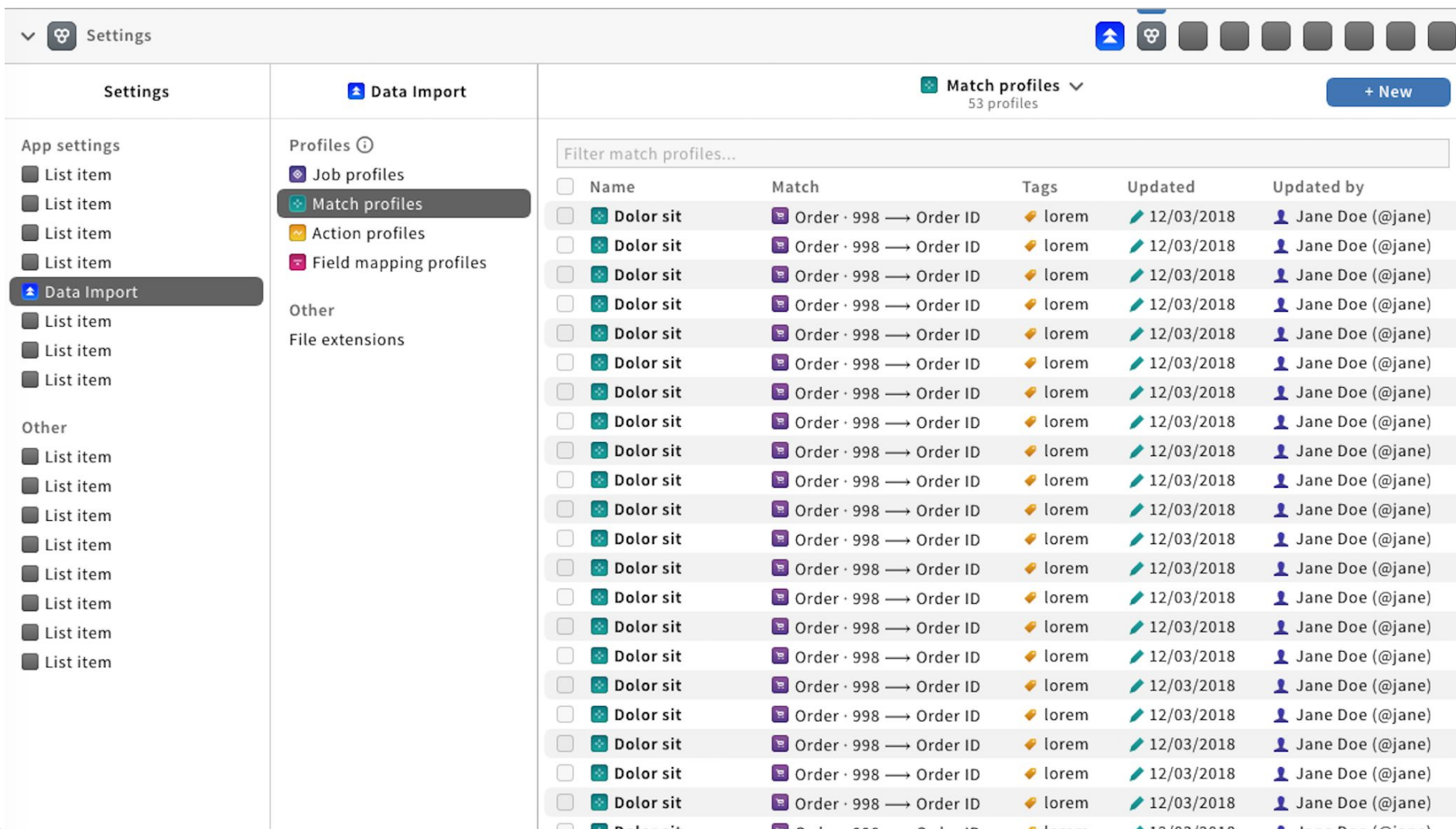
Settings field mapping

- *IN PROCESS*



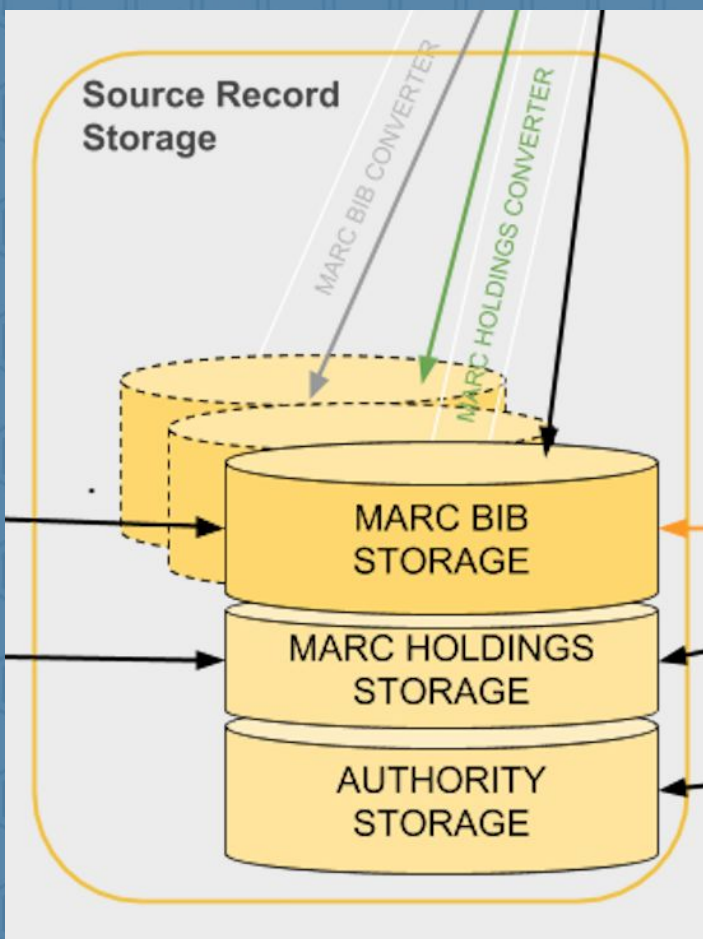


Data Import UX prototype - Settings match profiles - Create, Overlay/Update/Merge, Delete: *NOT STARTED*



SRS

Source Record Storage



SRS is where the records

- in various non-FOLIO metadata formats (e.g. MARC, and in the future BIBFRAME, Dublin Core, etc) is stored, and
- accessible to other bibliographic apps such as Inventory and MARCcat.

IN PROCESS - but no UI yet.

SRS (store the original record; *non-FOLIO format*)



Inventory

The screenshot shows the Folio Inventory interface. On the left, there's a 'Search & filter' sidebar with various filters like 'All (title, contributor, identifier)', 'Resource type', and 'Age of TV heroes'. The main area displays a list of records, including '14 cows for America' and '1963 Birmingham church bombing'. A record titled 'A journey through Europe Bildtontraeger high-speed lines European Commission, Directorate-General for Mobility and Transport' is highlighted.

MARCCat

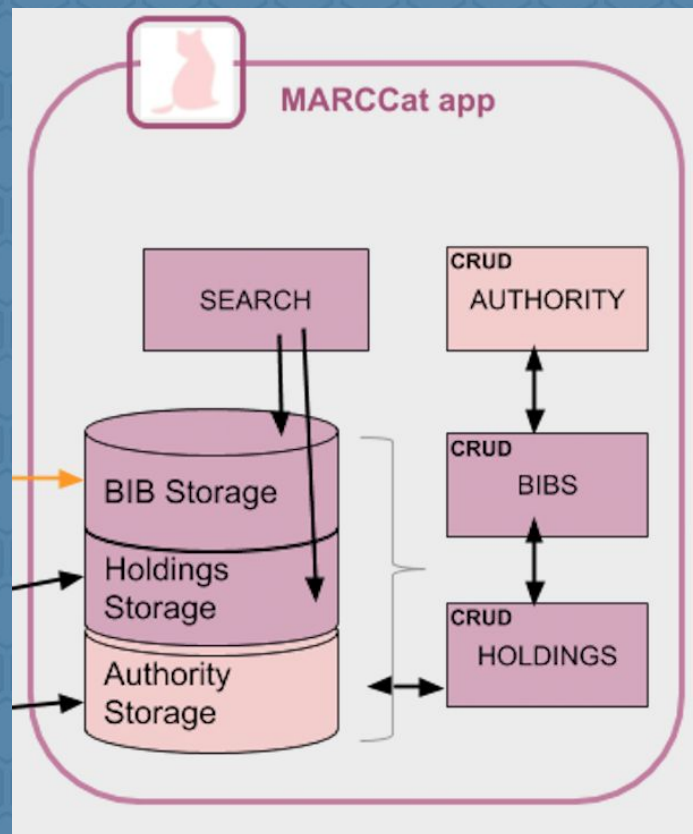
The screenshot shows the MARCCat interface. It displays a list of bibliographic records for 'Aphorisms / Franz Kafka'. The records include details like 'Name', 'Title', 'U. Title', 'Field', 'Date 1', 'Date 2', and 'Format'. A record titled 'Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by Michael Hofmann ; Foreword by Daniel Frank.' is highlighted.

The screenshot shows the SRS MARC source record for 'A journey through Europe Bildtontraeger high-speed lines European Commission, Directorate-General for Mobility and Transport'. The record is displayed in a structured format, including fields like 'LEADER', '001', '003', '005', '007', '008', '020', '024', '028', '035', '040', '041', '084', '245', '300', '610', '650', '710', '712', '900', '910', '951', '954', and '955'. The record is in MARC format, with fields separated by vertical bars and subfields by codes.

SRS

MARCCat

(MARC editor,
bibs and MFHD)



[DEMO](#)

MARCCat - FOLIO Q4, 2018 release



← → ↻ ⓘ Inte säker | folio-q4.aws.indexdata.com/marccat/search

Appar IndexData Calender Index Data tools FOLIO FOLIO Environme... System Dashboar... UXPROD FEATUR... Slack - FOLIO » Övriga bokmärken

MARCCat Users Inventory Check out Check in Requests Codex Search Apps ▾

× Search & Filter ▾

Q Records
Enter search criteria to start search + New ▾

^ Search

Select a field... ⓘ
Select condition...
Q Search...
+ Add

^ Record Type

☐ Bibliographic records
☐ Authority records

^ Suppressed

☐ Yes
☐ No

^ Language of text

☐ English
☐ Italian

← Choose a filter or enter search query to show results

MARCCat UX prototype



MARCCat

MARCCat

Inventory

Requests

eHoldings

Settings

×

Search & filter

Reset all

Search

Reset

Name

Begins with

Kafka

+ Add

Record type

Reset

☒ Authority records

☒ Bibliographic records

Suppressed

Yes

No

Language of text

English

Spanish

Chinese

Arabic

Format type

Archival manuscript / Mixed form.

Books

Film or video

Manuscript

Map

Microform

Records

3 authority records found / 27 bibliographic records found

+ New

Filter...

☐ Access point (1XX) ^	Title (245) v	Uniform title (240) v	Id. Number (001) v	Field	Bibs v	Heading v
☐ Kafka, Barbara.			000000000138	100	2	NAF
☐ Kafka, František,			000000000121	100	3	NAF
☒ Kafka, Franz, 1883-1924			000000000292	100	10	NAF
☐ Kafka, Barbara.	American food & California wine / by Barbara Kafka ; illustrated by Dale Glasser Bellisfield.		000000127816	100, 245.		
☐ Kafka, Barbara.	Microwave gourmet / Barbara Kafka.		000000127805	100, 245.		
☐ Kafka, F. L., 1926-	Tunnel to glory : a novel / by F.L. Kafka.		000000127803	100, 245.		
☐ Kafka, Folke	Evaluación estratégica de proyectos de inversión / Folke, Kafka.		000000127804	100, 245.		
☐ Kafka, Francis J.	Linoleum block printing [by] Francis J. Kafka.		000000127819	100, 245.		
☐ Kafka, František, 1909-	Velký pražský rabi Jehuda Löw : nová vyprávění z doby renesance / František Kafka.		000000127817	100, 245.		
☐ Kafka, František, 1909-	Židovské anekdoty / František Kafka.		000000127805	100, 245.		
☐ Kafka, František, 1909-	Židovské anekdoty / František Kafka.		000000127809	100, 245.		
☐ Kafka, Franz, 1883-1924, author.	Aphorisms / Franz Kafka .		000000127800	100, 245, 600, 900.		
	Aphorisms / Franz Kafka ; Translated					

Auth. · 000000000292

Kafka, Franz, 1883-1924

Edit

1 #aKafka, Franz, #d1883-1924

Copy

Authority record

000 00972nz 2200145 4500

001 000000000292

003 CaOOAMICUS

005 20181016105727.0

008 181016 n annnnabbn n2ann und u

040 #a PS #b ita

100 1 #a Kafka, Franz #d 1883-1924

400 1 #w nax@ #a Kafka, Frants #d 1883-1924

400 1 #w nax@ #a Kafka, F. #q (Franz) #d 1883-1924

Expand Authority Record

10 Associated bibliographic records

☒ Kafka, Franz, 1883 - 1924, author. 127800

☐ Aphorisms / Franz Kafka ;

☐ 2014 ☐ XXXX ☐ Book

☐ 100, 245, 600, 900.

☒ Kafka, Franz, 1883 - 1924, author. 127800

☐ Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by [...]



MARCCat UX prototype



MARCCat

MARCCat

Inventory

Requests

eHoldings

Settings

Search & filter

Reset all

Search

Name

Begins with

Kafka

+ Add

Record type

☐ Authority records

☒ Bibliographic records

Suppressed

☐ Yes

☐ No

Language of text

☐ English

☐ Spanish

☐ Chinese

☐ Arabic

Format type

☐ Archival manuscript / Mixed form.

☐ Books

☐ Film or video

☐ Manuscript

☐ Map

☐ Microform

Bibliographic records

27 results found

+ New (CTRL+N)

	Name (100, 110, 111) ^	Title (245) ^	U. Title (130, 240) ^	Id. (001) ^	Field	Date 1 ^	Date 2 ^	Format ^
☐	Kafka, Franz, 1883-1924, author.	Aphorisms / Franz Kafka .	Aphorisms. Selections. English	000000127800	100, 245, 600, 900.	2014		Language M.
☐	Kafka, Franz, 1883-1924, author.	Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by Michael Hofmann ; Foreword by Daniel Frank.	Aphorisms. Selections. English	000000127795	100, 245, 505, 520, 600, 700, 900.	2015		Language M.
☒	Kafka, Franz, 1883-1924, author.	Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by Michael Hofmann ; Foreword by Daniel Frank.	Aphorisms. Selections. English	000000127797	100, 245, 505, 520, 600, 700, 900.	2015		Language M.
☐	Kafka, Franz, 1883-1924, author.	Il Castello / Franz Kafka.		000000127651	100, 245, 900.	2009		Language M.
☐	Kafka, Franz, 1883-1924, author.	La metamorfosi / Franz Kafka.		000000127650	100, 245, 504, 900.	2009		Language M.
☐	Kafka, Franz, 1883-1924, author.	Letters to Milena / Franz Kafka ; translated and with an introduction by Philip Boehm.	Briefe an Milena. English.	000000127796	100, 245, 490, 500, 520, 600, 700, 775, 900.	2015		Language M.
☐	Kafka, Franz, 1883-1924, author.	Letters to Milena / Franz Kafka ; translated and with an introduction	Briefe an Milena.	000000127798	100, 245, 490, 500, 520, 600,	2015	1990	Language M.

Bib. · 000000127797

Aphorisms / Franz Kafka

Edit

245 title

Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by Michael Hofmann ; Foreword by Daniel Frank.

000 02881cam a2200481 l 4500

001 000000127797

003 CaOOAMICUS

005 19161005000000.0

008 181016s2015 nyuc 000 0 eng

010 \$a 2015025049

020 \$a 9780805212655 \$q (hardback)

020 \$a 0805212655 \$q (hardback)

020 \$z 9780805243369 \$q (e-book)

040 \$a DLC \$b eng \$e rda \$c DLC \$d YDXCP \$d BDX \$d BTCTA \$d OCLCF \$d BKL \$d NYP \$d CDX \$d VP@ \$d COO \$d PUL \$d OCLCQ

041 1 \$a eng \$h ger

042 \$a pcc

050 00 \$a PT2621.A26 \$b A2 2015

082 00 \$a 838/.91207 \$2 23

084 \$a PHI006000 \$a PHI013000 \$a PHI007000 \$2 bisacsh

100 1 \$a Kafka, Franz, \$d 1883-1924, \$e author.

View in Inventory

MARCCat UX prototype



MARCCat

MARCCatInventoryRequests eHoldingsSettings

X

Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by Michael Hofmann ; Foreword by Daniel Frank.
000000127797

Save & continue editing

Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by Michael Hofmann ;
Foreword by Daniel Frank.

000000127797

^ Suppress ⓘ
☐ Suppress from Discovery

^ Leader ⓘ

Leader ⓘ

00-04 Rec. length	05 Record status	06 Type of record	07 Bibliographic level
01041	c · Corrected or revised	a · Language material	m · Monograph / Item
08 Type of control	09 Char. Cod. scheme	10 Indicator count	11 Subfield code count
# · No specified type	a	2	2
12-16 Base address of data	17 Encoding level	18 Desc. Cataloging form	19 Multipart resource record level
00481	# · Full level	i · ISBD punctuation include.	#
20 Length-of-field portion	21 Length starting-character-pos.	22 Length impl.-Defined portion	23 Undefined
4	5	0	0

Leader 02881cam#a2200481#i#4500

^ Control fields (001, 003, 005) ⓘ

001000000127797

Back to inventory



MARCCat UX prototype

Inventory

MARCCat

Inventory

Requests

eHoldings

Settings

Search & Filter

Reset all

Search

All (title, contributor, identifier)

Kafka, Franz

Resource Type

cartographic dataset

cartographic image

cartographic moving image

cartographic tactile image

cartographic tactile three-dimensional form

cartographic three-dimensional form

computer dataset

computer program

notated movement

notated music

other

performed music

sounds

spoken word

still image

tactile image

tactile notated movement

Inventory

44 records found

+ New

Title

Contributors

14 cows for America

Deedy, Carmen Agra. ; Naiyomah, Wilson Kimeli. ; Gonzalez, Thomas

1963 Birmingham church bombing...

Klobuchar, Lisa.

Aphorisms / Franz Kafka ;

Willa and Edwin Muir ; Michael Hofmann ; Daniel Frank.

A journey through Europe

Bildtontraeger high-speed lines European Commission, Directorate-General for Mobility and Transport

Europäische Kommission Generaldirektion Mobilität und Verkehr

Anglo-Saxon manuscripts in microfiche facsimile Volume 25 Corpus Christi College, Cambridge II, MSS 12, 144, 162, 178, 188, 198, 265, 285, 322, 326, 449 microform A. N. Doane (editor and director), Matthew T. Hussey (associate editor), Phillip Pulsiano (founding editor)

Lucas, Peter J ; Arizona Center for Medieval and Renaissance Studies

Barack Obama

Edwards, Roberta. ; Call, Ken

Aphorisms / Franz Kafka

Expand all

Instance Record text

Edit in MARCCat

Administrative data

Title data

Identifiers

Contributors

Descriptive data

Notes

Electronic access

Subjects

Classification

Holdings: Main Library >

View holdings

+ Add item

Item: barcode

status

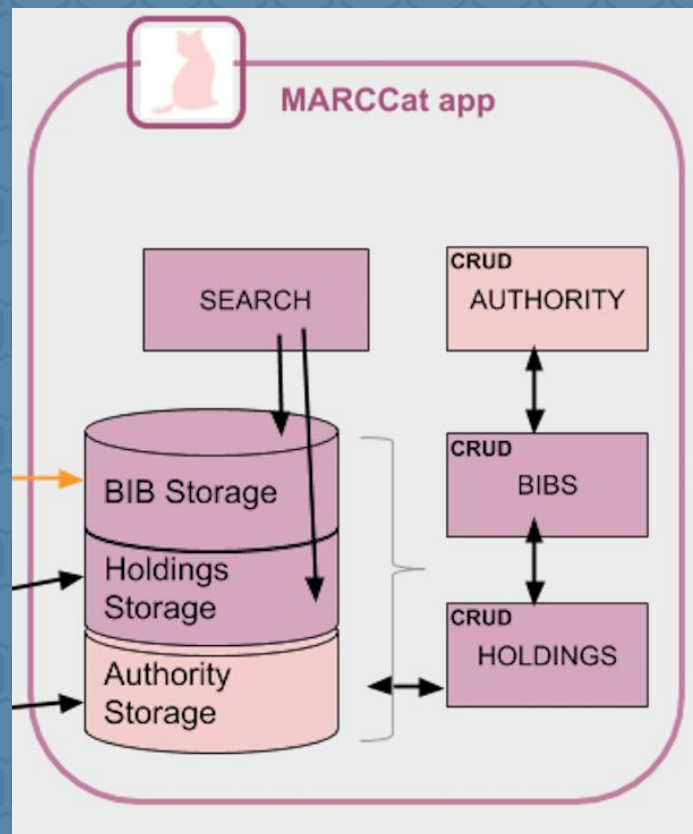
Material Type

8771152714626

Available

book

MARCCat (Authority)



MARCCat UX prototype



Settings › MARCCat

MARCCatInventoryRequests eHoldingsSettings

Settings	MARCCat settings	Local Authority Records
Settings	Field groupings	Allow the creation of Local Authority Records: ☒ On
Circulation	Templates management	
Data Import	Single record overlay rules	
Developer	Local Authority Records	
eHoldings		
Inventory		
MARCCat		
My profile		
Orders		
Organization		
Tags		
Users		
System information		
Software versions		

MARCCat UX prototype



MARCCat

MARCCatInventoryRequests eHoldingsSettings

Search & filter

Reset all

Search

Reset

Name

begins with

Kafka

+ Add

Record type

☒ Authority records

☐ Bibliographic records

Suppressed

☐ Yes

☐ No

Language of text

☐ English

☐ Spanish

☐ Chinese

☐ Arabic

Format type

☐ Archival manuscript / Mixed form.

☐ Books

☐ Film or video

☐ Manuscript

☐ Map

☐ Microform

Authority records

3 records found

+ New

Filter...

	Access point (1XX) ^	Id. Number (001) v	Field	Bibs v	Heading v
☐	Kafka, Barbara.	000000000138	100	2	NAF
☐	Kafka, František,	000000000121	100	3	NAF
☒	Kafka, Franz, 1883-1924	000000000292	100	10	NAF

Auth. · 000000000292

Kafka, Franz, 1883-1924

Edit

1 #aKafka, Franz, ‡d1883-1924

Copy

Authority record

00000972nz22001454500

0010000000000292

003CaOOAMICUS

00520181016105727.0

008181016 n annnabbn n2ann und u

040‡a PS ‡b ita

100 1‡a Kafka, Franz ‡d 1883-1924

400 1‡w nax@ ‡a Kafka, Frants ‡d 1883-1924

400 1‡w nax@ ‡a Kafka, F. ‡q (Franz) ‡d 1883-1924

Expand Authority Record

10 Associated bibliographic records

Kafka, Franz, 1883 - 1924, author.

127800

Aphorisms / Franz Kafka ;

2014

XXXX

Book

100, 245, 600, 900.

Kafka, Franz, 1883 - 1924, author.

127800

Aphorisms / Franz Kafka ; Translated from the German by Willa and Edwin Muir and by [...]

22 | www.folio.org

folio

MARCCat UX prototype



MARCCat

MARCCat

Inventory

Requests

eHoldings

Settings

×

New Authority record
Created 19/09/2018

Create record

Authority record

000000140000

^ Leader ⓘ

Leader ⓘ

00-04 Rec. length	05 Record status	06 Type of record	07 Bibliographic level
01041	c · Corrected or revised	a · Language material	m · Monograph / Item
08 Type of control	09 Char. Cod. scheme	10 Indicator count	11 Subfield code count
# · No specified type	a	2	2
12-16 Base address of data	17 Encoding level	18 Desc. Cataloging form	19 Multipart resource record level
00481	# · Full level	i · ISBD punctuation include.	#
20 Length-of-field portion	21 Length starting-character-pos.	22 Length impl.-Defined portion	23 Undefined
4	5	0	0

Leader 00000nam##2200000#a#4500

^ Control fields (001, 003, 005) ⓘ

001 000000127797

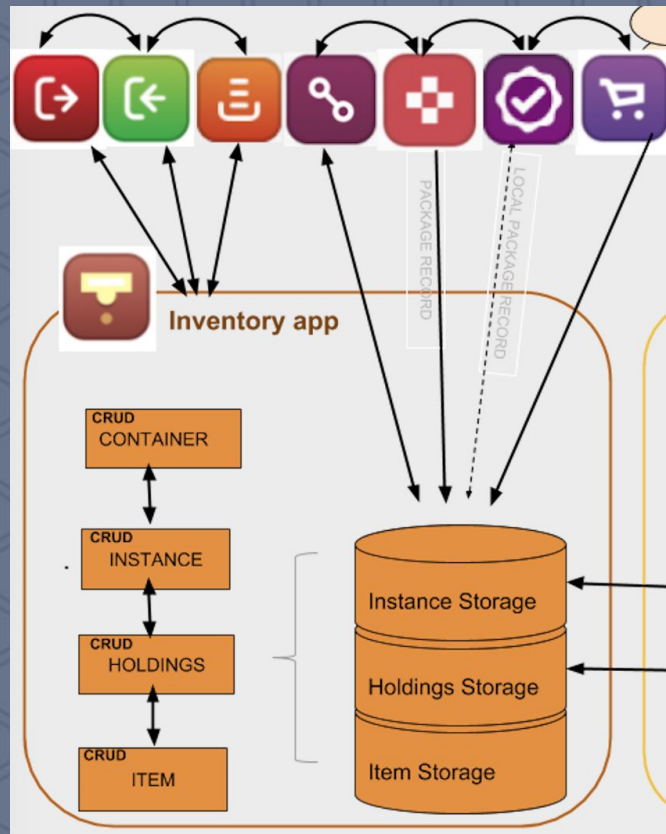
003 CaOOAMICUS

005 19161005000000.0

23 | www.folio.org

folio

Inventory's data model

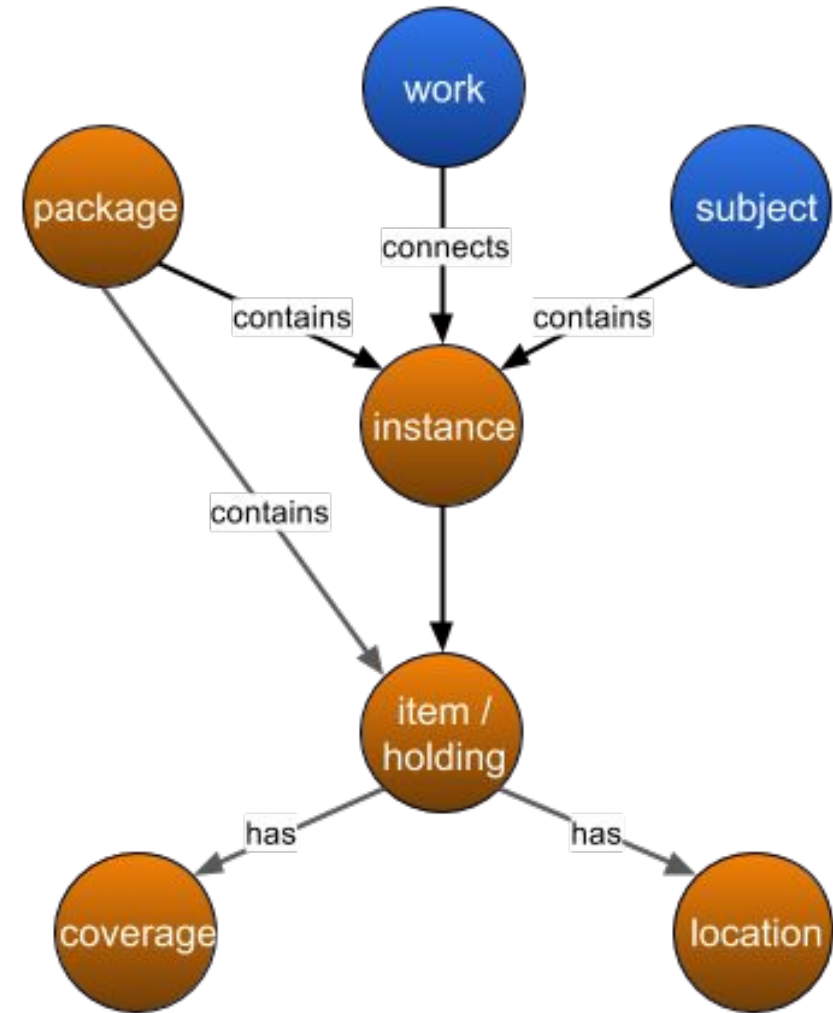


“Native FOLIO” format

- Instance
- Holdings
- Item
- Container (kits, packages ...)
- Instance and Holdings data *can* be derived from source metadata when available.
 - MARC, for now
- Source metadata is not required
- Flexible data model
 - instance > holdings > item

Inventory (the local catalogue)

- Inspired by the BIBFRAME 2 conceptual model and the Dublin Core (DC) Elements
- The list of data elements has evolved as the MM-SIG outlined and review use cases and requirements





Inventory Record types which are associated

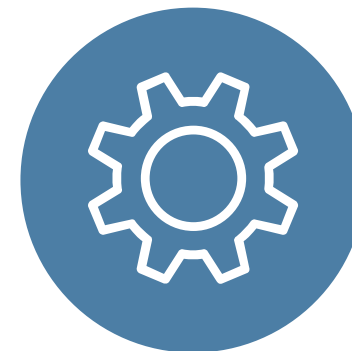
DONE



INSTANCE



HOLDINGS



ITEM

IN PROCESS

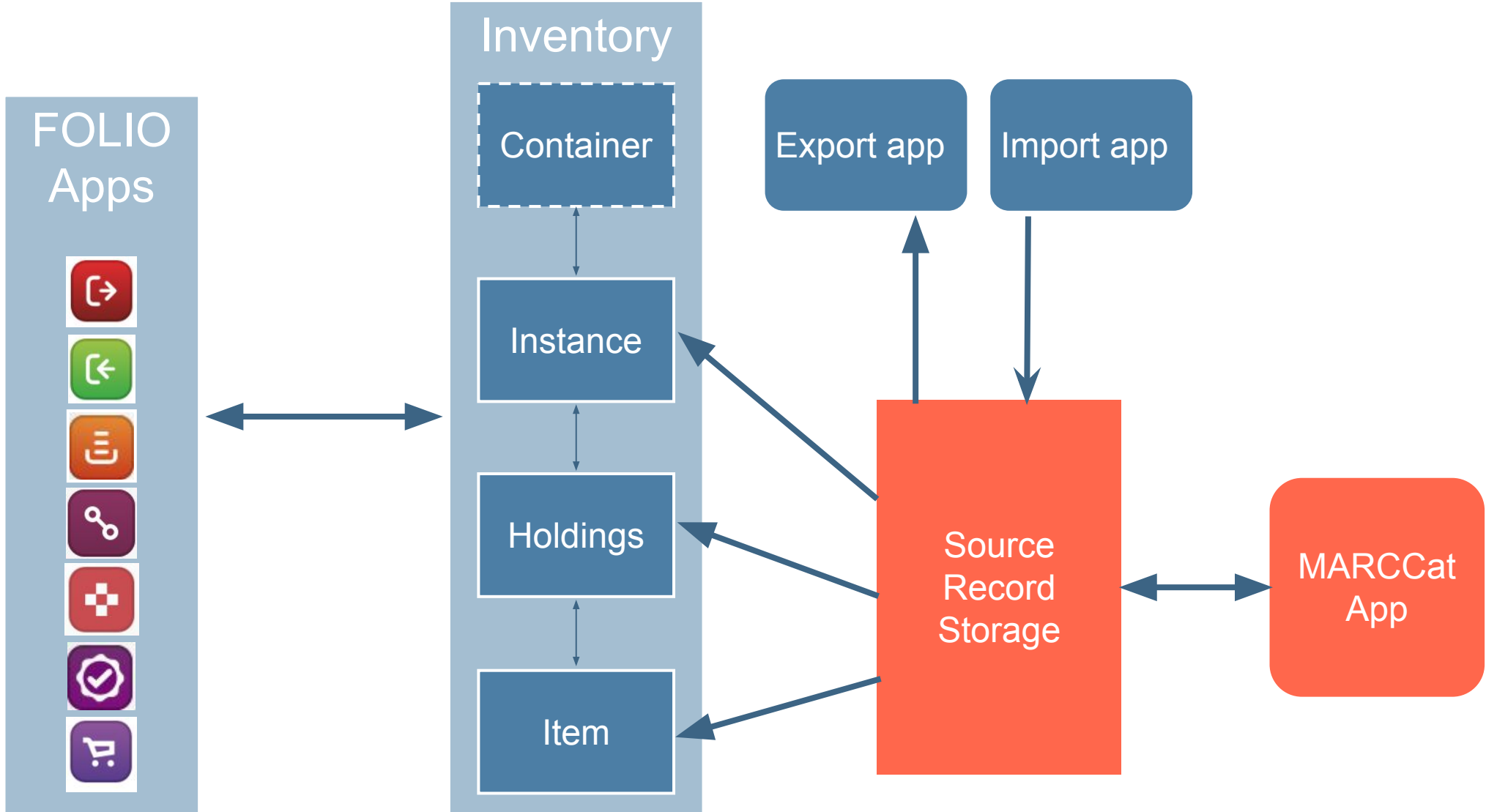


CONTAINER

DEMO



Inventory as Hub



Inventory Functions and app-interaction

- Order <> Inventory
- Request <> Inventory
- Check in/Check out <> Inventory
- MARCcat <> Inventory (*wip*)
- SRS <> Inventory (*wip*)
- Codex Search <> Inventory
- eHoldings <> Inventory
- ERM ...

- Search local Instance, Holdings, and Items - and Container records
- Manage and edit your local Inventory records
- View source metadata for bibliographic and holdings data (when a source record is present)
- Jump to the appropriate app for working with the source data via a single button click

Inventory supports multiple data formats

- BIBFRAME
- DC
- EAD
- MARC21
- other MARC formats
 - danMARC2
 - UKMARC
 - UNIMARC
- MODS
- ...



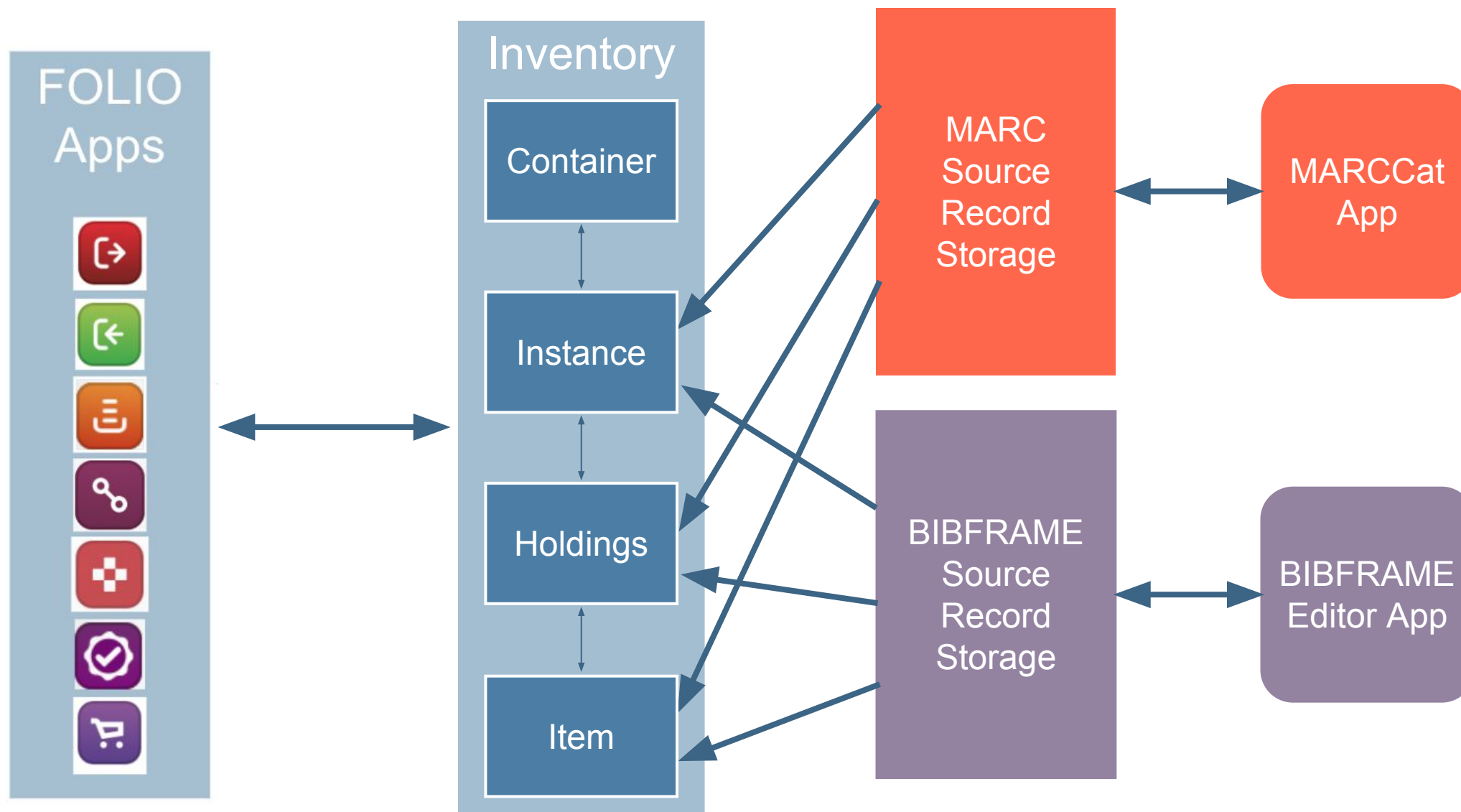
“Inventory is the FOLIO app where bibliographic information from a variety of sources can be presented in a uniform, abstracted form for management of the collection regardless of the format or content rules used to describe a resource.”

[FOLIO Inventory: a working definition](#)

Metadata Management SIG

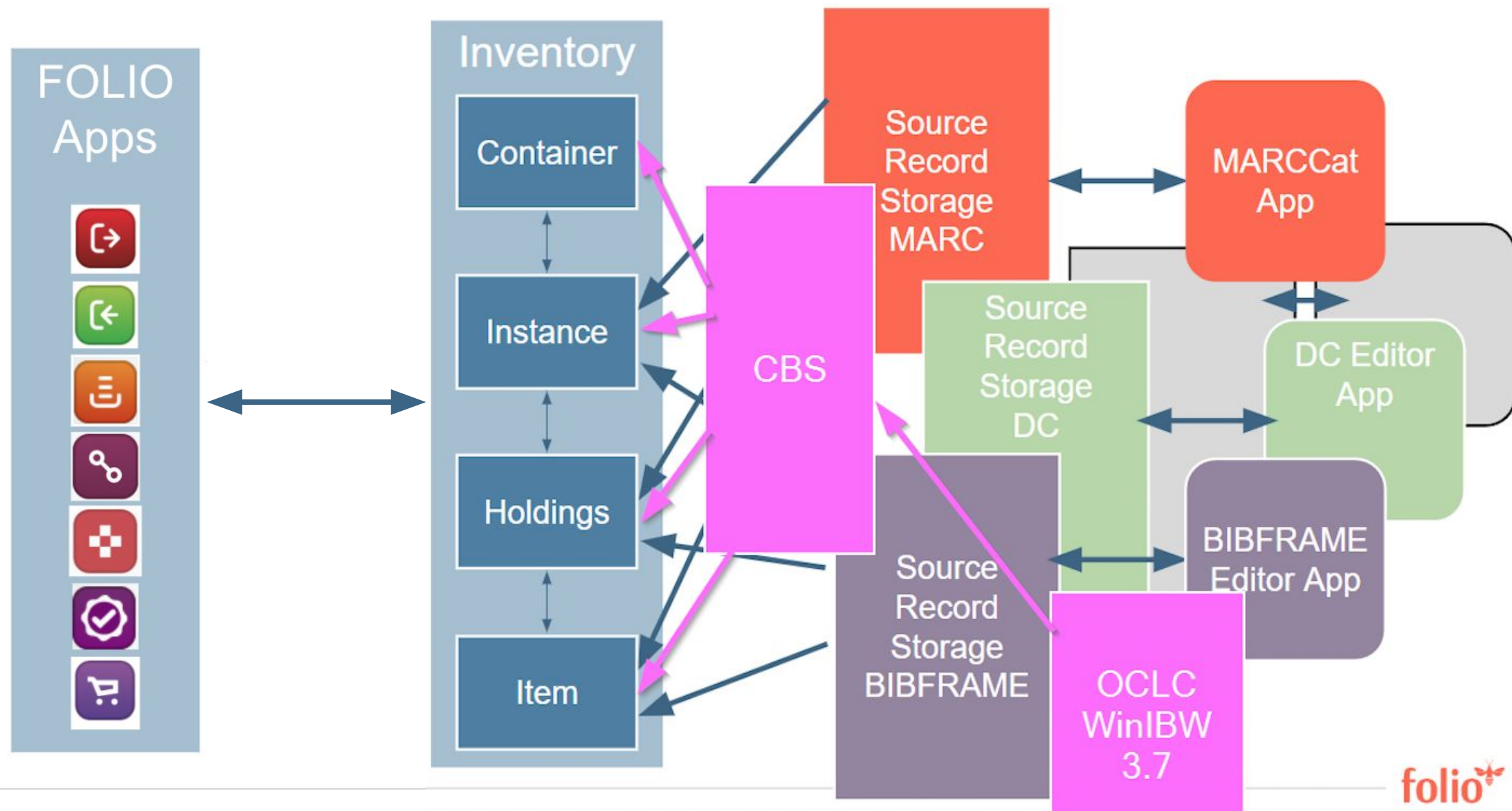


MARCCat + BIBFRAME - exist side-by-side



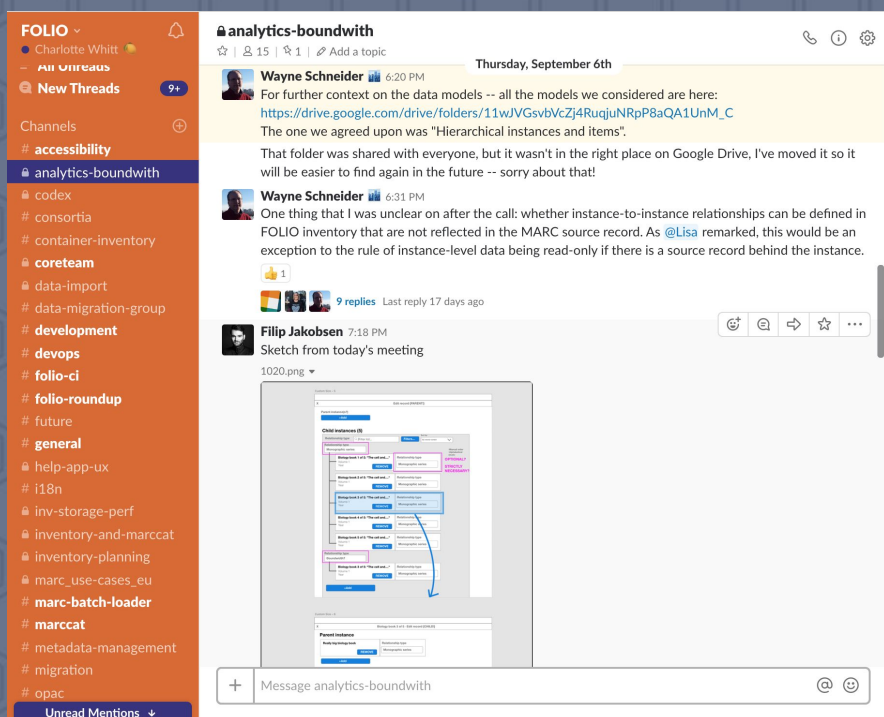


And more to come - multiple can exist side-by-side



Slack channels to follow:

#analytics-boundwith
#container-inventory
#data-import-batchload
#marccat
#metadata-management
#source-record-storage



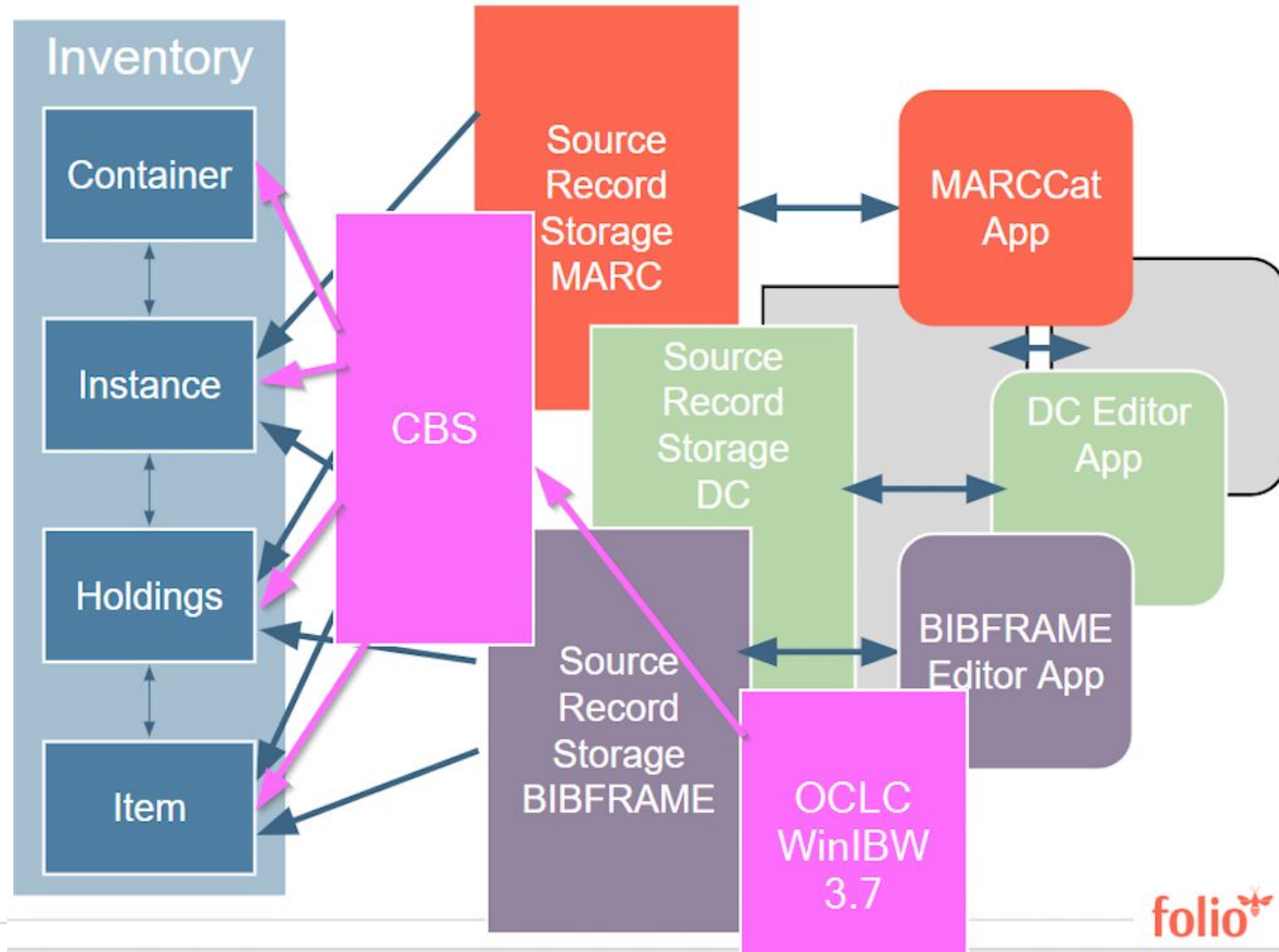
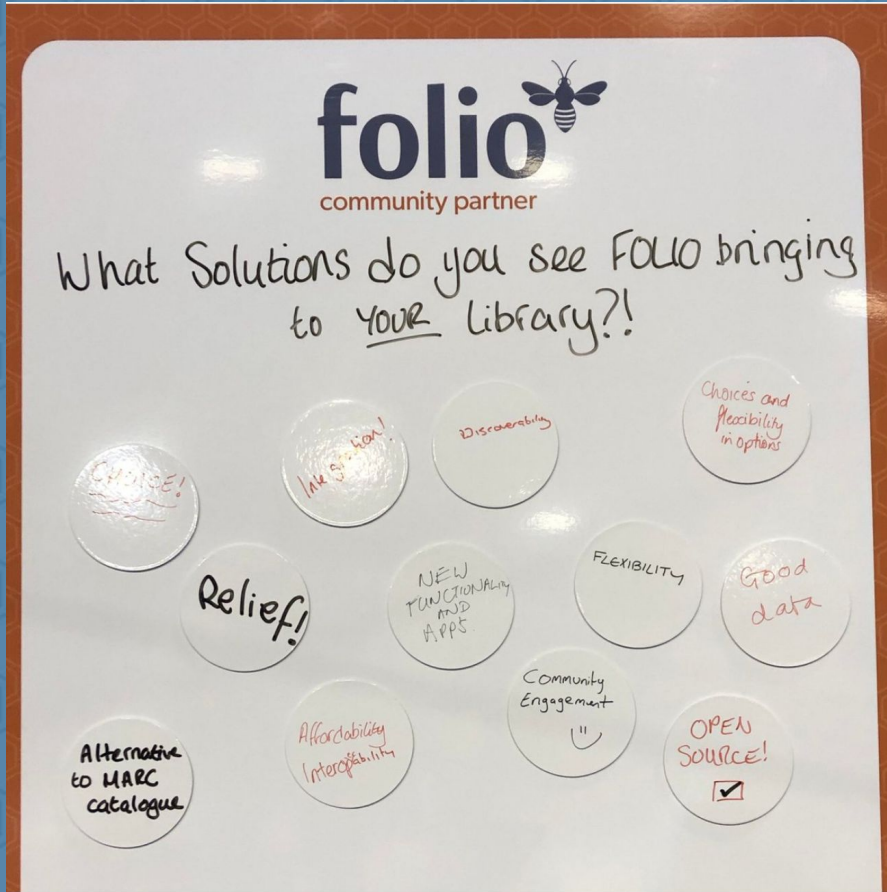
More to study ...

- [FOLIO Inventory: a working definition](#)
- [Holdings records in FOLIO - MM-SIG recommendation](#)
- [Local Packages in Inventory \(UIIN-155\)](#)
- [Inventory and MARCcat](#)

API documentation:

- <https://dev.folio.org/reference/api/#inventory> (Inventory)
- <https://dev.folio.org/reference/api/#data-import> (SRS and Data Import)
- MARCcat to be added

Your questions:

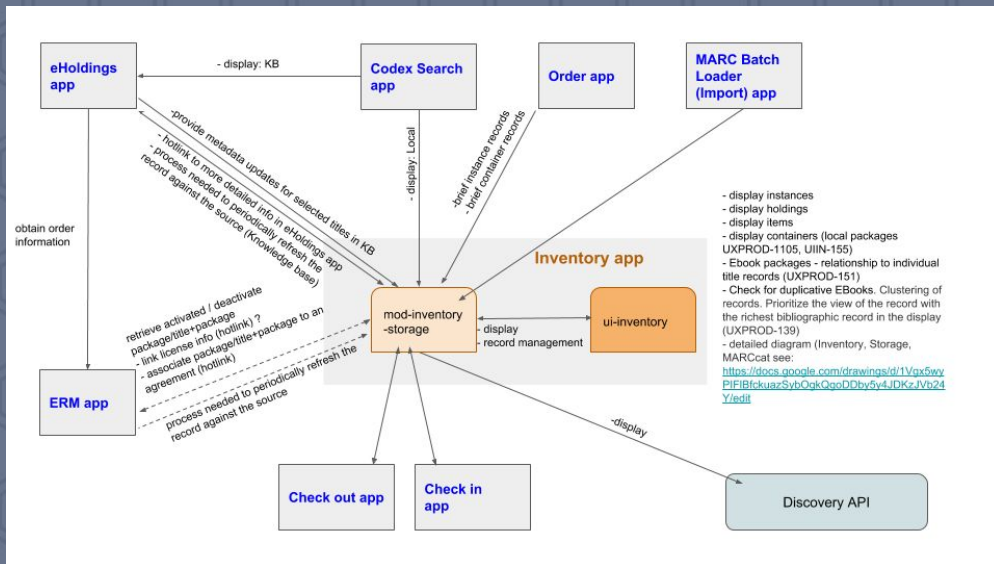


Extra slides ...

- Container record
- Item status
- Instance/MARC mapping
- IDs (UUID/HRID)
- Instance permissions
- Holdings location
- Item location
- Analytics and Bound withs

Container records

NOT STARTED



- Local package records
- Collect other Inventory records together for management purposes
- Container level metadata for describing the package, subscription, or membership
- Orders can link to the container record rather than one of the instances in a package
- Records can be a part of more than one container.



Item status

Order <> Inventory

Check in/check out <> Inventory

- Describes an item's availability
- Usually changed automatically by a FOLIO app, not manually
- Three ways to describe an item's state
 - **Status/Availability:** Where is this item? Can it be circulated?
 - **Needed for:** *When this item becomes available, where will it go next? And where will it go after that? (i.e., an item can be needed for multiple things)*
 - **Process:** *What staff process is this item in? (e.g. Cataloging, Bindery, Shelf search)*

Item Status in Inventory Item Record: Available

← → ↺ 🏠

Not secure | folio-snapshot.aws.indexdata.com/inventory/view/f12f3f5c-c0db-4cb0-b40f-8f13a1175494/840ab582-5ca7-4b36-a48e-d02d8...

🔑 ☆ 🌙 G | A ⋮

📱 Apps

📁 EBSCO

📁 FOLIO

📁 Trip Planning

📁 Art

📁 Baseball

📁 Computer

📁 Conferences

📁 eBooks

📁 Estate

📁 Family

📁 Finances

📁 Food

📁 Fun

📁 Harvard

»

📦 Inventory

↔️ Check out

↩️ Check in

📦 Inventory

📄 Requests

🔍 Codex search

👤 Users

🧩 Apps ▾

👤

✕

🟢 7197884855418Item . Available ▾

✎

Instance:Age of TV heroes

Holdings: Main Library >

🟢 Item record

🟡 book

🟢 Available

Expand all

▾ Administrative data

▾ Item data

▾ Enumeration data

▾ Conditions

▾ Notes

▴ Loan and availability

Permanent loantype

Can circulate

Item status

Available

Item status date

3/8/2019, 7:33 AM

Requests

0

Item status: Checked out

← → ↺ 🏠

⚠ Not secure | folio-snapshot.aws.indexdata.com/inventory/view/f12f3f5c-c0db-4cb0-b40f-8f13a1175494/840ab582-5ca7-4b36-a48e-d02d8...

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📖 FOLIO

📅 Trip Planning

🎨 Art

⚾ Baseball

💻 Computer

📅 Conferences

📖 eBooks

🏠 Estate

👪 Family

💰 Finances

🍴 Food

🎮 Fun

🎓 Harvard

»

📦 Inventory

➡ Check out

⬅ Check in

📦 Inventory

📄 Requests

🔍 Codex search

👤 Users

🧩 Apps ▾

👤

✕

🟢 7197884855418Item . Checked out ▾

✎

Instance:Age of TV heroes

Holdings: Main Library >

🟢 Item record

📖 book

🟡 Checked out

Expand all

▾ Administrative data

▾ Item data

▾ Enumeration data

▾ Conditions

▾ Notes

▴ Loan and availability

Permanent loantype

Can circulate

Item status

Item status date

Requests

Checked out

3/8/2019, 9:18 AM

0

Item status: Checked out

← → ↺ 🏠

⚠ Not secure | folio-snapshot.aws.indexdata.com/inventory/view/f12f3f5c-c0db-4cb0-b40f-8f13a1175494/840ab582-5ca7-4b36-a48e-d02d8...

🔑 ☆ 🔄 G | A ⋮

📱 Apps

📖 EBSCO

📖 FOLIO

📅 Trip Planning

🎨 Art

⚾ Baseball

💻 Computer

📅 Conferences

📖 eBooks

🏠 Estate

👪 Family

💰 Finances

🍽 Food

🎮 Fun

🎓 Harvard

»

📦 Inventory

➡ Check out

⬅ Check in

📦 Inventory

📄 Requests

🔍 Codex search

👤 Users

🧩 Apps ▾

👤

✕

🟢 7197884855418Item . Checked out ▾

✎

Instance:Age of TV heroes

Holdings: Main Library >

🟢 Item record

📖 book

🟡 Checked out

Expand all

▾ Administrative data

▾ Item data

▾ Enumeration data

▾ Conditions

▾ Notes

▴ Loan and availability

Permanent loantype

Can circulate

Item status

Item status date

Requests

Checked out

3/8/2019, 9:18 AM

0

Possible Item Statuses in FOLIO

Item Status and which apps affect it - DRAFT				
Seq	Item Status	Implemented?	Triggered from which app?	Notes
1	On order	Yes	Order (point of order), Data Import	
2	In process	No?	Order (point of receipt/check-in), Data Import	does additional detail get handled via the "Process" subdivision for the In process Item Status
3	Available	Yes	Inventory (when creating a new item), Check-in, Data Import, (maybe Order at point of receipt?)	
4	Checked out	Yes	Check-out	
5	Recently returned	No?	Check-in	May not be there yet
6	In transit	Yes	Check-in, (maybe Order at point of receipt?)	When the piece is not at its home location, or when there is a request and it's not at the proper service point
7	Awaiting pickup	Yes	Check-in	When there is a request and it's at the proper service point
8	Missing	Yes	Inventory (dropdown, not from the edit screen)	Not on the shelf, but not officially withdrawn/weeded (hope that it may turn up again). Maybe make available from the check-in screen as well
9	Withdrawn/Weeded	No?	Inventory (TBD), Data Import	Removed from the collection
10	Lost	No?	User (TBD)	Removed from the collection after patron reported lost (does this need to be separate from Withdrawn?)
* No validation on item status field currently, so it accepts whatever text other apps send it				

Inventory - MARC mapping



Recommended MARC to Inventory Instance mapping – working document ★

File Edit View Insert Format Data Tools Add-ons Help Last edit was made 6 days ago by anonymous

150% \$ % .00 123 Arial 10 B I A

istance

A	B	C
Instance	Type (where applicable)	MARC (field, subfield) Default
humanReadableId		001
Mode of Issuance		
identifiers	LCCN	010\$a
identifiers	ISBN	020\$acq
identifiers	Invalid ISBN	020\$zq
identifiers	ISSN	022\$a2
identifiers	Invalid ISSN	022\$y; 022\$z; 022\$m
identifiers	Linking ISSN	022\$l2
identifiers	Other Standard Identifiers	024\$acdqz2
identifiers	Publisher or Distributor Number	028\$abq
identifiers	System Control Number	035\$a
identifiers	Cancelled System Control Numbers	019\$a, 035\$z
identifiers	GPO Item Number	074\$a
identifiers	Cancelled GPO Item Number	074\$z
languages		041\$a else 008/35-37
classifications	Library of Congress Classification	050\$ab
classifications		060\$ab
classifications		080\$ab
classifications	Dewey Decimal Classification	082\$ab



IDs (UUID and HRID formatting)

One instance with various related SRS

Instance A	UUID 1	High	in12345	
MARC SRS 1	UUID 2	High	001 = 12345	HRID = Instance HRID without the "in" prefix
MARC SRS 2	UUID 3	Med	001 = 12345-2	If subsequent SRS for the same Instance, then the HRID adds -2, -3, etc onto the original HRID
MARC SRS 3	UUID 4	Med	001 = 12345-3	
MARCCat 1	UUID 5	High	001 = ma12345	HRID = Instance HRID with the "ma" prefix
MARCCat 2	UUID 6	Med	001 = ma12345-2	If subsequent MARCCat for the same Instance, then the HRID adds -2, -3, etc onto the original HRID
MARCCat 3	UUID 7	Med	001 = ma12345-3	
BIBFRAME SRS 1	UUID 8	Low	12345	HRID = Instance HRID without the "in" prefix
BIBFRAMEcat 1	UUID 9	Low	bf12345	HRID = Instance HRID with the "bf" prefix
EAD SRS 1	UUID 10	Low	12345 +	HRID = Instance HRID without the "in" prefix
EADcat 1	UUID 11	Low	ea12345	HRID = Instance HRID with the "ea" prefix
999 with 3 subfields for the 3 related UUIDs				
\$i [Instance UUID] \$m [MARCCat UUID] \$s [SRS UUID]				

Inventory - permissions



Logical Permission Name PLACEHOLDER - NOT REVIEWED WITH SIG	Jira story:	Permission Description	Provided By	Assumptions	Inventory app is visible in Recent Applications Toolbar and/or Application Select page	Basic metadata can be searched and filtered in Inventory app	Restricted item data can be searched and filtered in the Inventory app	Instance record with associated holdings and items will be returned in Search app (no "restricted" data should be displayed)	Instancedata elements can be viewed
Instances: Can view Instance records			Inventory app		X	X		X	X
Instances: Can edit an existing Instance records		- Assumption is that if you can edit you can edit and view all types of fields	Inventory app		X	X	X	X	X
Instances: Can create new Instance records			Inventory app		X	X	X	X	X
Instances: Can duplicate an Instance record			Inventory app		X	X	X	X	X
Instances: Can delete Instance records			Inventory app		X	X	X	X	X
Holdings: Can view holdings records			Inventory app		X	X		X	
Holdings: Can edit an existing holdings record			Inventory app		X	X	X	X	
Holdings: Can create new holdings record			Inventory app		X	X	X	X	
Holdings: Can delete holdings records			Inventory app		X	X	X	X	
Items: Can view an Item record		Allows searching and viewing of basic user profile data (excludes circulation data such as fees and	Inventory app		X	X		X	

Locations - holdings record



Inventory



Check out



Check in



Inventory



Requests



Codex Search



Users



Apps ▾



Magasin 01-plan > g ThorénHoldings ▾



Instance: Picture atlas of the Arctic, Elsevier,, 1969

[Collapse all](#)

▾ Administrative data

^ Locations

Holdings location

Permanent

Magasin 01-plan

Temporary

-

Shelving order

Shelving title

Holdings call number

Copy number

Call number type

Call number prefix

Call number
g Thorén

Call number suffix



Locations - item record

Inventory

Check out

Check in

Inventory

Requests

Codex Search

Users

Apps

×

1202218163Item . Available

Item Record

book

Available

Collapse all

Administrative data

Item data

Enumeration data

Conditions

Notes

Loan and availability

Locations

Holdings location

Permanent Location

Magasin 01-plan

Temporary location

-

Item location

Permanent Location

-

Temporary location

-

Effective location for item

Magasin 01-plan



Effective location logic

Logic for Calculating the Effective Location

Scenario 1:

	Permanent	Temporary
Holding	A	
Item		
Effective location for item = A		

Scenario 2:

	Permanent	Temporary
Holding	A	B
Item		
Effective location for item = B		

Scenario 3:

	Permanent	Temporary
Holding	A	B
Item	C	
Effective location for item = C		

Scenario 4:

	Permanent	Temporary
Holding	A	B
Item	C	D
Effective location for item = D		

Scenario 5:

	Permanent	Temporary
Holding	A	
Item	B	
Effective location for item = B		

Scenario 6:

	Permanent	Temporary
Holding	A	
Item		B
Effective location for item = B		

Scenario 7:

	Permanent	Temporary
Holding	A	B
Item		C
Effective location for item = C		

Scenario 8:

	Permanent	Temporary
Holding	A	
Item	B	C
Effective location for item = C		

Other scenarios?



Inventory, Instance record (Chalmers)

Inventory

Check out

Check in

Inventory

Requests

Codex Search

Users

Apps

Search & Filter

All (title, contributor, identifier)

arctic

Search

Reset all

Resource Type

☐ cartographic dataset

☐ cartographic image

☐ cartographic moving image

☐ cartographic tactile image

☐ cartographic tactile three-dimensional form

☐ cartographic three-dimensional form

☐ computer dataset

☐ computer program

☐ notated movement

☐ notated music

☐ Omappad, odefinierad

☐ other

☐ performed music

☐ sounds

☐ spoken word

☐ still image

Inventory

65 Records found

New

Title	Contributors	Pub
electronic equipment for time measurement of short cycle manual operations an of elements in these	Fahlström, Hans	(190
Picture atlas of the Arctic	Thorén, Ragnar	Els
POAC 77 : proceedings [of the Fourth International Conference on Port and Ocean Engineering under Arctic Conditions, Memorial University of Newfoundland, St. John's, Newfoundland, Canada, September 26-30, 1977].	International Conference on Port and Ocean Engineering under Arctic Conditions (4 : St.John's : 1977)	(19
POAC 77 : proceedings [of the Fourth International Conference on Port and Ocean Engineering under Arctic Conditions, Memorial University of Newfoundland, St. John's, Newfoundland, Canada, September 26-30, 1977].	International Conference on Port and Ocean Engineering under Arctic Conditions (4 : St.John's : 1977)	(19

Picture atlas of the Arctic

Elsevier,, 1969

Collapse all

Instance Record

tactile text

Picture atlas of the Arctic

Instance data

Instance	Metadata	Cataloged date
HRID	source	
in00353754	FOLIO	
Instance status term	Instance status code	Instance status source
Status updated date		
Mode of issuance		

Title data

Resource title

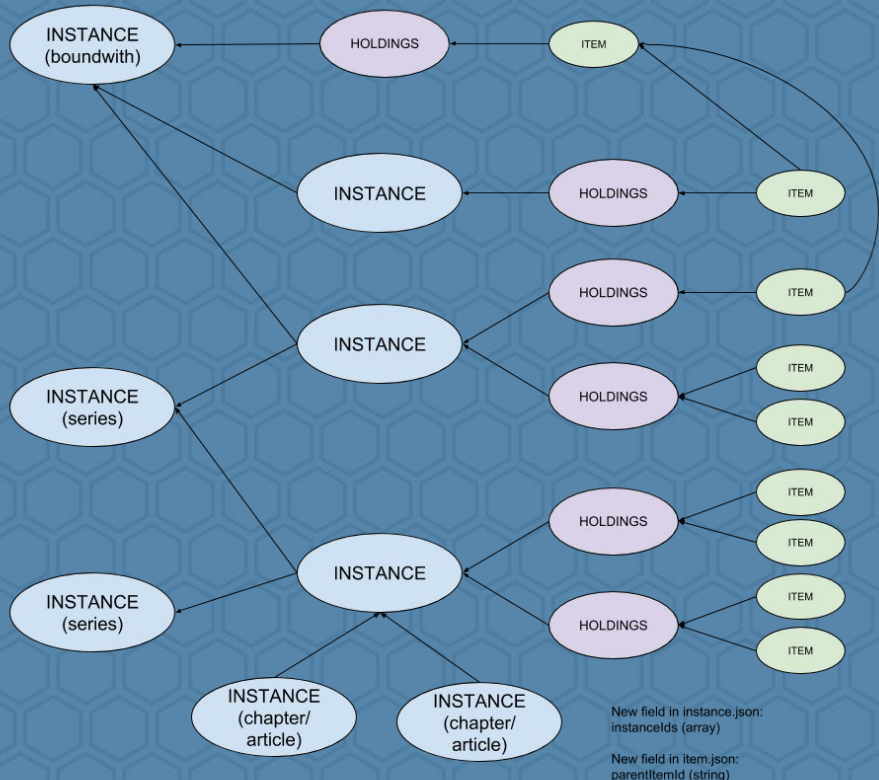
Picture atlas of the Arctic

Index title

Identifiers

Resource identifier type	Resource identifier
ISBN	000 105270 0

Analytics and Bound withs



- FOLIO allows new types of relationships between records
- Hierarchical parent / child relationships between instances.
- Relationships between items are still a work in progress

MARCCat UX prototype



Settings · MARCCat

Settings

Settings

Circulation

Data Import

Developer

eHoldings

Inventory

MARCCat

My profile

Orders

Organization

Tags

Users

System information

Software versions

MARCCat settings

Field groupings

Templates management

Single record overlay rules

Local Authority Records

Name	Description	Heading fields	Title fields	
Title	The title field grouping is used to search for titles, something	130, 210, 222, 240, 242, 243, 245, 246, 247, 730, 740	130, 210, 222, 240, 242, 243, 245, 246, 247, 730, 740	Edit
Author	Lorem ipsum dolor sit amet	100, 110, 111, 700, 710, 711, 800, 810, 811	100, 110, 111, 700, 710, 711, 800, 810, 811	Edit
Collection title	Lorem ipsum dolor sit amet	245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222	245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222	Edit
Keywords B	Lorem ipsum dolor sit amet	245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222	245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222, 245, 130, 222	Edit
Donor name	Lorem ipsum dolor sit amet	245, 130, 222, 245, 130, 222, 245, 130, 222	245, 130, 222, 245, 130, 222, 245, 130, 222	Edit
Subject	Lorem ipsum dolor sit amet	600, 610, 611, 630, 647, 648, 651, 653, 654, 655, 656, 657, 658, 662, 69x	600, 610, 611, 630, 647, 648, 651, 653, 654, 655, 656, 657, 658, 662, 69x	Edit

Field grouping: Title

Name

Title

Description

The title field grouping is used to search for titles, something

Authority records

☐ All fields

Bibliographic records

☐ All fields

130

130, 210, 222, 240, 242, 243, 245, 246, 247, 730, 740

Settings

+ Add

Tips :-)

Q1 2019 small demo
videos of each app

- Data Import
- Inventory (later)
 - Check in
 - Check out
- Fines/Fees
- (more)



<https://drive.google.com/drive/folders/11JznTNQQMOFS9lwQfA6ybrNbw7iCfSEw?usp=sharing>