Theme: Shanghai library FOLIO project
Time: February 9, 2021 07:00pm (EST) / February 10, 2020 08:00am (GMT+8)

Attendees:
Vincent Bareau (Enterprise Architect, EBSCO)
Gang Zhou (Project manager, Shanghai library)
Sha Jiang (Technical Director, Jiatu)
Lucy Liu (Product Owner, Folio China)

Notes:

We have library cards for group users. Each card can borrow over 3000 items. The response time is too long when we check out over 1000 items. Was this considered in the FOLIO circulation?

Sha Jiang: The response time was very long when we checked out over 100 items to institutions. It's problematic for folio to handle the group users.

Gang Zhou: We have mobile libraries and school libraries that might need to check out 3000 to 10000 items.

Vince:
- Nobody has identified the requirements for this before. It's unique to Shanghai Library.
- There were no formal specifications for how many items needed to be supported on a card. Most librarians on the Folio project would expect that 100 items might be a very high, and mostly improbable, upper limit.
- There's a missing entity in folio for your needs which is a group user. I expect that depending on what has to happen, the group user would have to be treated differently. You have to figure out the performance issues for what you need. There's going to be some kinds of development work to introduce the concept of a group user and to identify the functionality that is associated with the groups. In other words, when you have a group user, what to show or what do you not show as compared to a regular user.

Gang Zhou: Do you have any suggestions for this scenario if we don't use group cards?

Vince:
- Option 1: You need to identify what is specifically causing the problem. One way is to attempt to identify all the places where a large number of loans might be loaded. And then from there figure out how to prevent that in those circumstances potentially by also creating a new kind of user type.

- Option 2: There is "patron group" in folio. Generally, users are associated with a patron from a group. It's really just a metadata property. But maybe the loan could be modified to go to the patron group as opposed to the user.
- What is the use case when a new item needs to be checked out to that library? You will check it out on your system. But how do you know that has been checked out?

Gang Zhou: We use a common check out operation with the checkout windows in the current system and check out items one by one.

Vince: Maybe there is a way for you to issue multiple cards to the library. If you have 8,000 loans, you could issue 80 cards instead of one. Then you could reduce the number of loans per card. Is that possible?

Gang Zhou: It will be difficult to list and count the items checked out to the library.

Vince: If you have a library that needs to check out 10,000 items, you can handle a hundred thousand units in 100 cards. You issue one hundred cards to that library. If you create a patron group that represents that library and you assign each of those one hundred cards and each of those one hundred users and patrons to that same Patron group, then you can fill up the loans. You put up to a hundred loans on one card and then roll over to the next user. you still have the ability potentially to report on that patron group. What are the aggregate numbers of loans in this group? What and where are all the items in the patron group? It becomes a reporting problem as opposed to a real-time problem.

Gang Zhou: It works. But not ideal.

Sha Jiang: If so, we need another system to manage these 100 cards. That's much work to do.

Vince:
- Agree. It is going to be some amount of work to do. But I don't think it's necessarily as big as some of the other options, which are to introduce the concept of a group user, identify requirements, modify all the transaction logic and presentations UI to accommodate the conditions of the group user.
- The main idea is that you transfer the burden of the large number of loans to the reporting system instead of the checkout system in the transactions. Just put items on the card. When this card is full, let it go to the next card. You may even want to automatically generate a new one when the cards are full.

Lucy: Can we submit this request and wait for the community to develop it?

Vince:
- No. It's unique to SHL. It can't be prioritized in the community.
- You can use this as a temporary solution. In the meantime, identify the requirements you need for a patron group, understand how to handle the patient group properly, and identify all the places where it would have to be supported, like the user app and the check-in/check-out applications.

Gang Zhou: We will discuss it with the Circulation Dept and continue the discussion in future meetings if needed.