Theme: Shanghai library FOLIO project
Time: January 12, 2021 07:00pm (EST) / January 13, 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:

1. Database indexes

Sha Jiang: We might need to add indexes to databases in order to improve search efficiency. Do we have an index list in the community? Any recommendations?

Vince:

- The database indexes are not centrally managed. Each module that implements storage provides a schema.json file that defines the data model and which also includes any index definitions.

- The community as a whole is monitoring the performance. We have the Performance Task Force. And the Core-functional team that is reviewing those. When we identify performance issues, then we try to identify the root cause and get to the specific component that the index is applied.

- Index is a tuning exercise. So you may change the index in one place and that might work better. But you'll cause a problem somewhere else sometimes.

- We are looking into ElasticSearch to produce indexes in a different environment in the PostgreSQL database.

Sha Jiang: We also noticed other things, such as CQL queries, not effective. Should we make a list of the problems and report in Jira?

Vince:

- There was a CQL parser that is responsible for converting the CQL query on the API and transforming into an SQL query for the back database. There are non-efficiencies and limitations with that.

- If you identified specific issues with what the CQL created and if it's incorrect, then you should create a bug for it. It can be incorrect results, results with useless information, results that slow down the query or other problems.

- Are there modules you have found problematic at this point?

Sha Jiang: Inventory-storage

Gang Zhou: User, loan, circulation-storage.

Vince: Okay. Those are known areas. We've been focusing on introducing ElasticSearch. Maybe we can extend ElasticSearch to user and maybe circulation storage as well sometime.

2. Archiving loan records

Gang Zhou: An inquiry has been raised around archiving of data. In particular, the desire to archive all loans over 1 year old. However, there is concern that some loans at the time of archiving may still have unresolved dependencies such as unpaid fines. Looking for guidance for the following:

• If loans are archived into another table or structure, is it possible to retain a link to the dependent properties (such as fines).

• Is it possible to import legacy loans (some up to 10 years old or greater) into an archival system while also bringing along open dependencies?

Vince: At this time Folio does not provide a built-in archiving functionality to manage data lifecycles. You cannot automatically archive always. There's nothing in folio allowing you to move part of the items to archive and keep the open loans or the open fees active on those items. You have to keep them as a set. Currently there is no mechanism that allows you to maintain a link between an archived item and the open loan/fee.

3. Item Status

Vince: The story MODINVSTOR-653 is mislabeled. The title and description imply that this is about localization. But what seems to be the core issue is the flexibility in defining item status. Essentially, it is not possible to add new values (or remove existing ones) because these support a hardcoded workflow implemented in the business logic of the code. The core issue is how to allow different workflows - which can introduce different item statuses.

Gang Zhou: We hope we can define new item statuses in FOLIO through UI. FOLIO needs a few default statuses for system workflow, for example check-in, check-out, but it makes sense that the librarian can create some new item status to trace the exact status of items and to customize some localized workflows. Of course, these workflows will NOT affect the system default workflows.

Lucy: MODINVSTOR-653 was updated.

Followup: Charlotte Whitt, PO in charge of inventory, changed issue type of MODINVSTOR-653 from bug to story and linked it to **UXPROD-1535**.