Spitfire Q Release Features Preview

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About this slide deck

- **Spitfire - "Q" features** : Kanban board
- Iterative slide deck
- It is a proposed list of features. Based on team's feedback we will decide what features can be done in this release.
- Dev team: Add your comments to this slide deck.
- **Timeline**
  - Proposed Dev Freeze: 15 Mar 2024
  - Proposed Public release: 29 Apr 2024
  - Proposed release timeline

Proposed Capacity allocation (%)

- New development:
- Maintenance (address P1/P2) :
- Platform updates :
- NFRs :
- Tech debt/innovation :

Proposed "Q" Features

- Long term solution for migrating authority records UXPROD-4082
- Create new MARC authority from UI UXPROD-3910
- Authority control: Subject validation UXPROD-4033
- Export deleted authority record UUIDs via API UXPROD-4305
- MARC record validation (v1) UXPROD-3940
- 010 LCCN updates (MARC bib and authority) UXPROD-4060
- Browse by Instance classification/bib call number UXPROD-4120
- Sort by publication year UXPROD-2703
- Inventory/Search Enhancements & Fixes – Quesnelia UXPROD-4369
  - quickMARC: Link to MARC Leader and 008 documentation
  - Inventory app: Update HTML page title to include search query
  - Linked $0 displays http:// or https:// when applicable

Long term solution for migrating authority records

Why: We do not have an efficient way to migrate authority records. Whether it is due to mapping rules changes or migrating from one system to FOLIO, when dealing with a large set of records. It is slow and inefficient. As more libraries (Michigan State, Library of Congress, National Library of Australia) use the authority app and have millions of records, current supports for migration do not scale.

Feature: UXPROD-4082

What:

- **Data import was not meant to be a migration tool. A solution must be developed outside of data import to support creating/updating a large set of records.** This solution should serve as a pattern for other record types such as bibs/holdings/items.

Create new MARC authority from UI UXPROD-3910

- **What:** To provide the ability for users to create a new MARC authority record from the quickMARC UI
- **Why**: Librarians need the ability to create headings that do not exist so that they can:
  - Create headings that more closely align to the mission of their institution
  - Create records to distribute to other libraries as part of a national database
  - Create records for eventual replacement by external record

Authority control: Subject validation

Why: 650/655 bib fields are used to describe subjects. These subjects carry information as to its classification source. For authority control/linking, a cataloger wants to make sure that the bib 650/655 is linked to the right authority record that comes from the correct classification source.

Feature: UXPROD-4033

What:

- Apply subject thesaurus validation rules to MARC bib fields 650/655
- Tenant configuration: Enable subject thesaurus validation per bib field
- Create/Edit bib/authority via UI validation
- Data import (create/update) bib/authority handling
- Handle authority 040 / 040 subfield f to support source code to populate linked bib subfield 2
- Handle authority 008 position 11 as the value must match 650 and 655 indicator 2 value to link

Export deleted authority record UUIDs via API

Why: Library of Congress (LOC) has a service called the Catalog Distribution Service (CDS) that libraries subscribe to for name authority records. LOC provides subscribed libraries with an export of deleted MARC name authority records.

What: Via an API provide a way for library to export deleted authority record UUIDs based on date authority record was deleted, authority source file, and authority headings type, etc. The user can then take the list of UUIDs to run a data export job for MARC authority records.

Feature: UXPROD-4305

Note: No UI will be provided. Only responsibility is to provide deleted record UUIDs based on the criteria outlined in the **What** section. *May consider a change to the soft delete from 7 days to 31 days rather than implement https://issues.folio.org/browse/MODSOURCE-638*

MARC record validation (v1)

Why: When a user creates/edits a MARC bib and authority record via UI then allow a library to enforce their own MARC validation rules.

What: v1 needs to support basic rules: MARC field (repeatable (r)/non-repeatable (nr), subfield (r/nr), subfield fixed values, valid indicators and two levels of errors (error cannot save and error can save).

Feature: UXPROD-3940

MARC 010 = LCCN updates (MARC bib and authority)

Why: MARC 010 = Library of Congress Control Number. It is LOC's unique identifier known all over the world and thus the library wants to make sure that FOLIO handles formatting and search requirements.

What: Format validation: Initial logic will be implemented on Create/Edit/Derive MARC bib and authority record UI. No impact to data import for "Q" release. Ideally it would be nice to auto-correct based on format validation rules. May consider a tenant level configuration.

Search: Inventory app must support searching 010 $ a and 010 $z (including normalization).
Dependency on Folijet https://issues.folio.org/browse/UIIN-2539 to support 010 $z

Note: This feature has additional requirements to prevent the creation of multiple records with the same LCCN. Ignore for now as there might be alternative approach. Also, for z39.50 authority requirements, we may have to make updates to handling 010 $a and 010 $z for searching.

Feature: UXPROD-4060

Browse instances by classification UXPROD-4120

- **What:** To create a new Inventory Browse option for browsing by Instance Classification and sort by Classification type.
- **Why**: Library of Congress contributes bibliographic records to other libraries, and those contain classification numbers assigned by the Library of Congress. Other libraries often shelflist by the holdings/item call number, but the Library of Congress organizes materials by this bibliographic call number.
- Current Spike in backlog: MSEARCH-561

Sort by publication year UXPROD-2703

- **What:** Add new column to Inventory results list for publication date and populate with sortable publicationPeriod field
- **Why**: The publication date is a critical element librarians use to distinguish between similar titles
- **Context**:
  - Another team created sortable publicationPeriod with start and end date properties
  - Need to split Publishers column and add a new Publication date column with the publicationPeriod data

quickMARC: Link to MARC Leader and 008 documentation

Why: Catalogers are unclear what values to enter when it comes to Leader and 008.

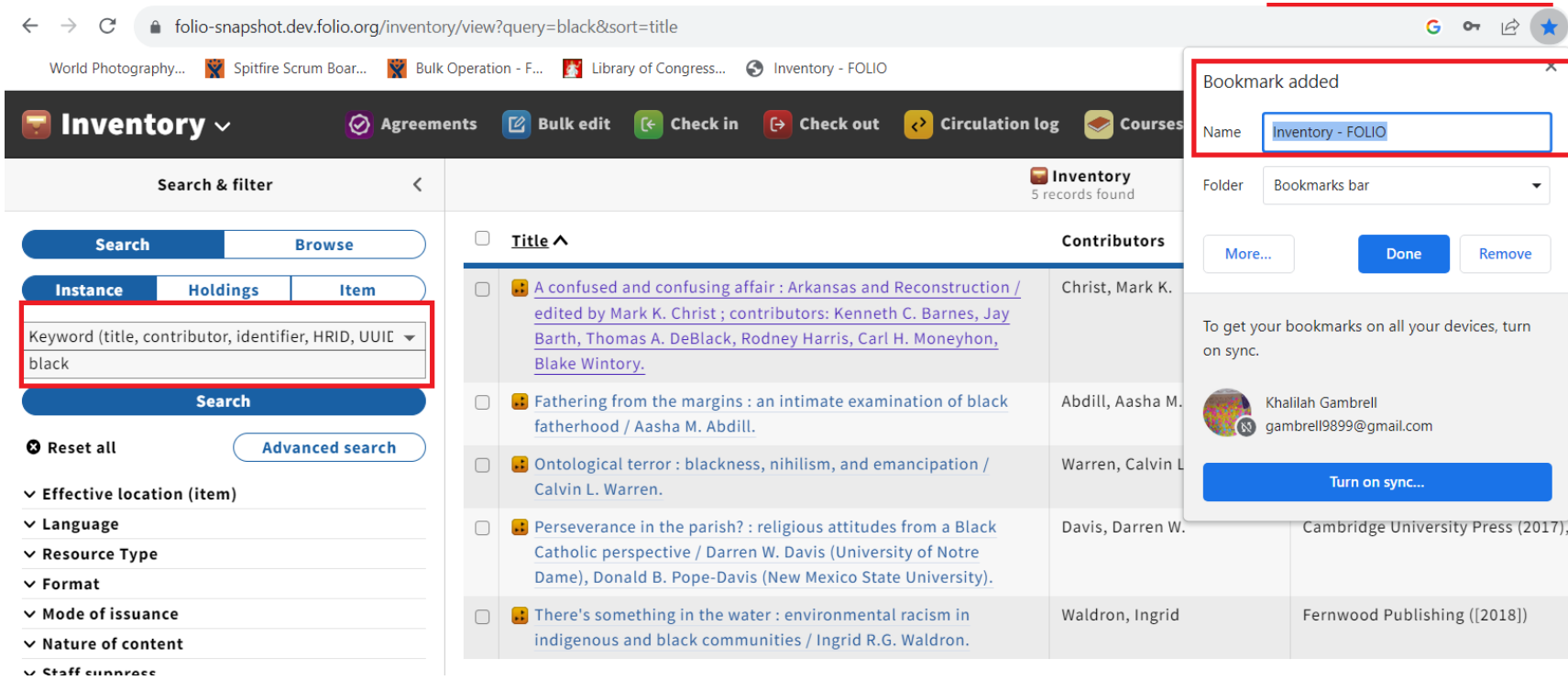
What: Applies to Create/Derive/Edit MARC bib/MARC holdings/MARC authority. **Display a link to the applicable MARC Leader and 008 documentation.**

Feature: To be created

Inventory app: Update HTML page title to include search query

Why: When a user wants to bookmark a search query, it bookmark default value = *Inventory – FOLIO.*

What: Update HTML page title logic to include the Inventory search query entered



Format: Inventory - <<search term(s) entered>> - Search results - FOLIO

Feature/Story: https://issues.folio.org/browse/UIIN-2581

Authority control update: Linked bib $0 must display http://

Why: Catalogers (including the LOC) do not consider $0 valid without web protocol

What: Add applicable web protocol to existing authority controlled links AND to authority source file base URL for future authority controlled linking

Note:

Feature: MODQM-352 UIQM-502

MARC authority control updates

Why: Catalogers have mentioned that authority control does not work as expected when linking 111 (or maybe 110). Will verify.

What: Correct authority control mapping logic. Consider any migration issues...

Feature: TBD

Note:

Tech debt

Platform Tech debt (need teams help to update)

Backend

- TBD
- RCA

Frontend

- Stripes (TBD)
- RCA

Stretch Goal – Features (in priority order)

Front-end | Tech debt or Innovation

- **What:** Feature that will make your lives easier or you want to experiment.
- **Why:** Because I want you guys to grow your skills and to address any issues that present development pain points
- **Proposed allocation** (8 pts max)

Front-end suggestion

<<Please add here>>

Denys' Poppy Suggestion: refactor some of the settings pages to use react-query instead of redux+fetch (less boilerplate code, simpler code structure and easier to understand data flow)

Feature: TBD by FE devs

Back-end | Tech debt or Innovation

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Back-end suggestion

<<Backend Team - Please add your suggestion below>>

Feature: TBD by BE devs

Next steps (team will determine together)

- Which features should be assigned to an architect?
- Thoughts on approach to revise feature estimations?
- Which features have enablers?
- Which features seem unrealistic for "Q" release?
- Which features could be assigned to another team?