



Knowledge Integration

Morning Glory R2 2022 Release Digest





 Knowledge Integration

Who has made it Key Morning Glory Features & Numbers

Thunderjet

Firebird

Folijet

Vega

Spitfire

Prokopovich

Bienenvolk

Modules & Versions

Key Nolana Proposed Features

Useful Links





Who has made it



Spitfire

Spring Force

Bienenvolk(ERM)

Stripes Force

UNAM

Vega

Leipzig

Firebird

Mjolnir

Folijet

Kitfox

Thor

K-Int

BAMA

Sif

Volaris

Prokopovych

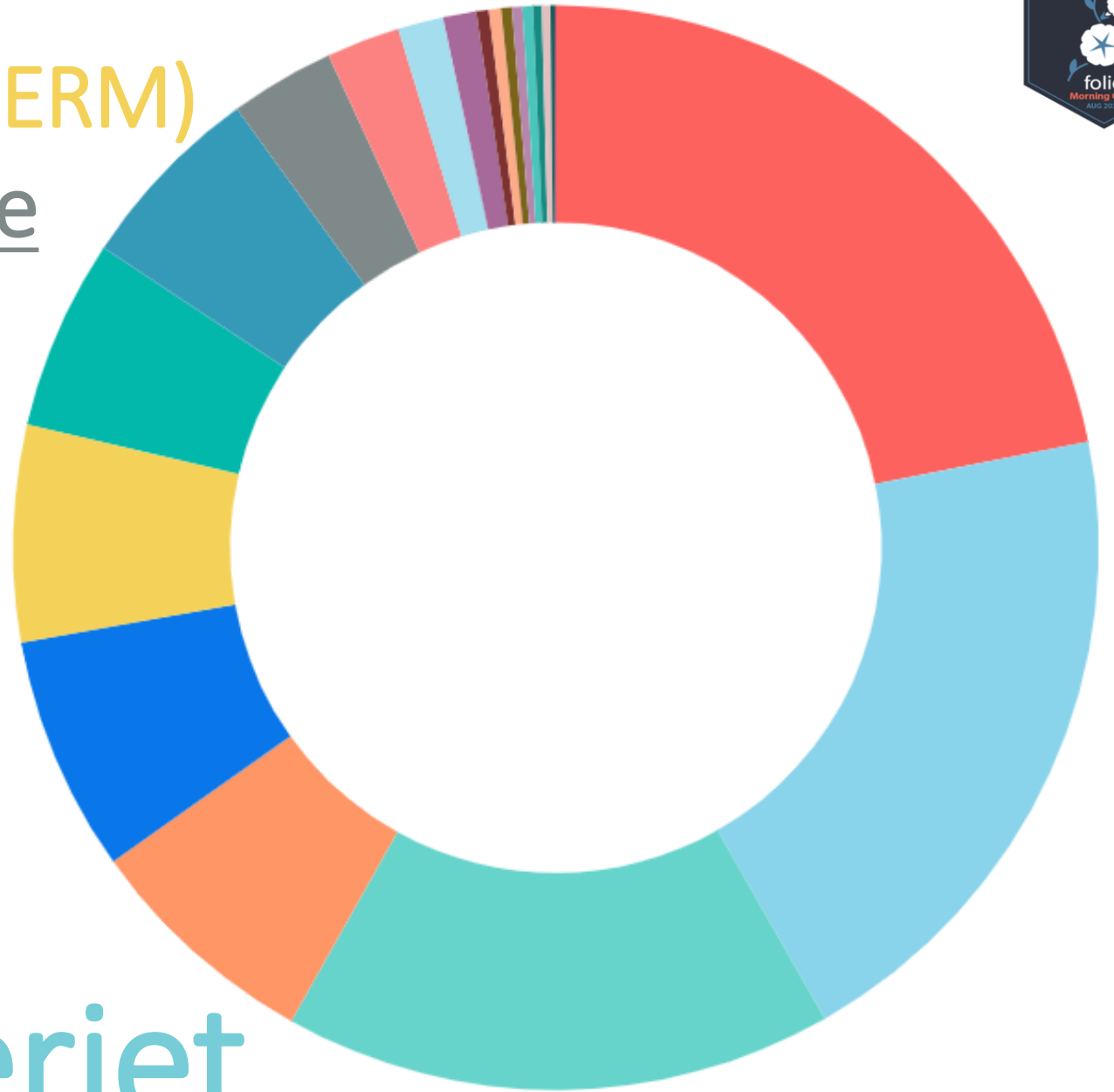
FOLIO DevOps

EBSCO - FSE

Core: Platform

PTF

Thunderjet





Key Morning Glory Features & Numbers



BULK-EDIT

- Users (csv)
- Item locations (in-app)
- Item statuses (in-app)

CATALOGING

- Delete authority records
- Export authority records
- Browse contributors
- MARC validation improvements – phase 1
- (quickMARC) - display data field protection indicator
- (quickMARC) - optimistic locking

DATA IMPORT

- Performance & stabilization
- Update inventory records by match on POL and VRN
- Add Administrative note to Instance, Holdings, and Items
- Data import log enhancements
- Data field protection improvements
- Permissions refinement

INVENTORY APP

- Search improvements

ACQUISITIONS

- Stabilization
- Export acquisitions data
- Add additional functionality to GOBI mapping profiles
- Update FOLIO<>EBSCONET order renewal logic
- Allow user to edit instance connected to POL
- Carry POL 'rush' indicator to corresponding receiving record
- Settings > Configure Organization types

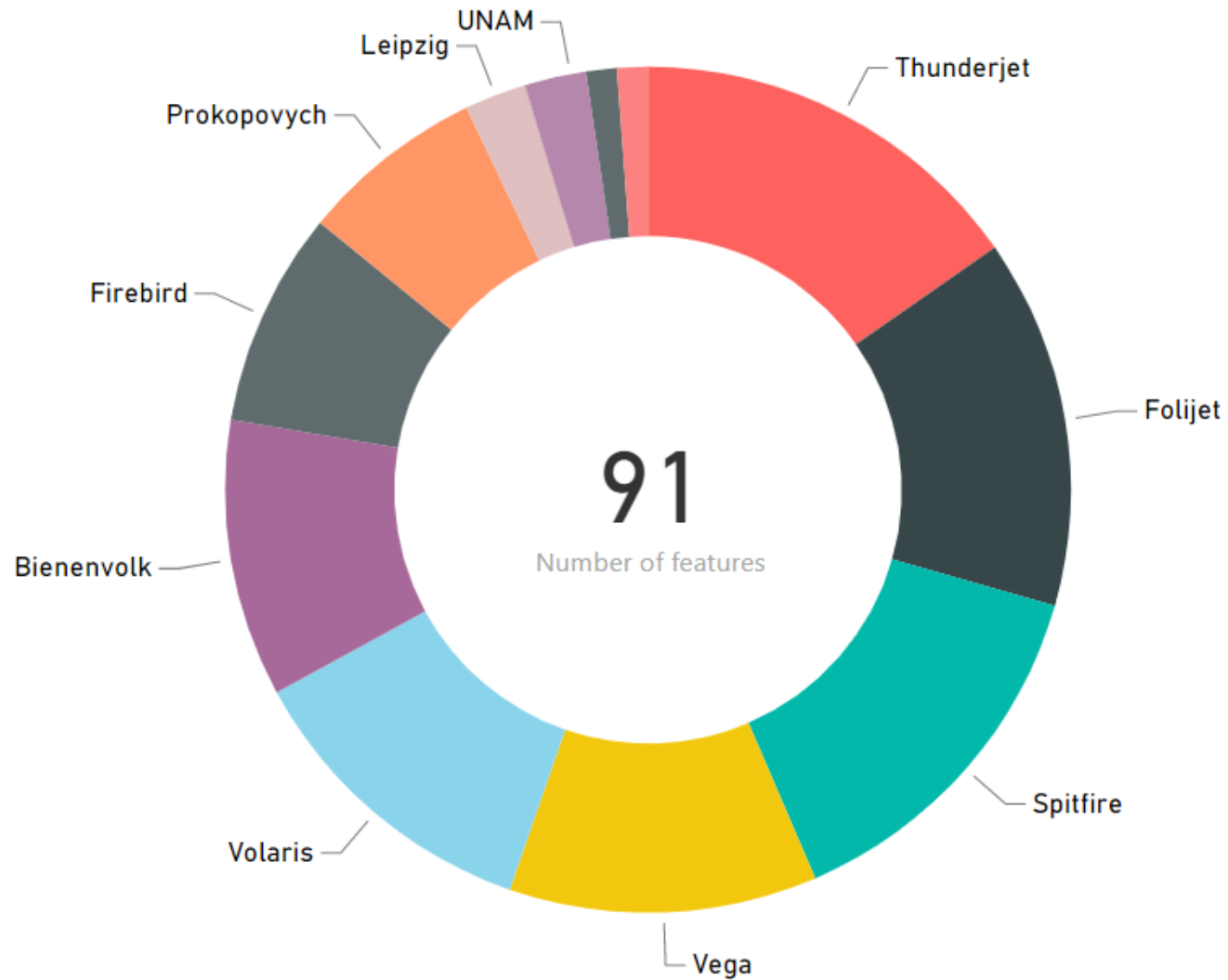
CIRCULATION / USERS

- Title level requests

Morning Glory (R2 2022) dashboard - <https://issues.folio.org/secure/Dashboard.jspa?selectPageId=12204>



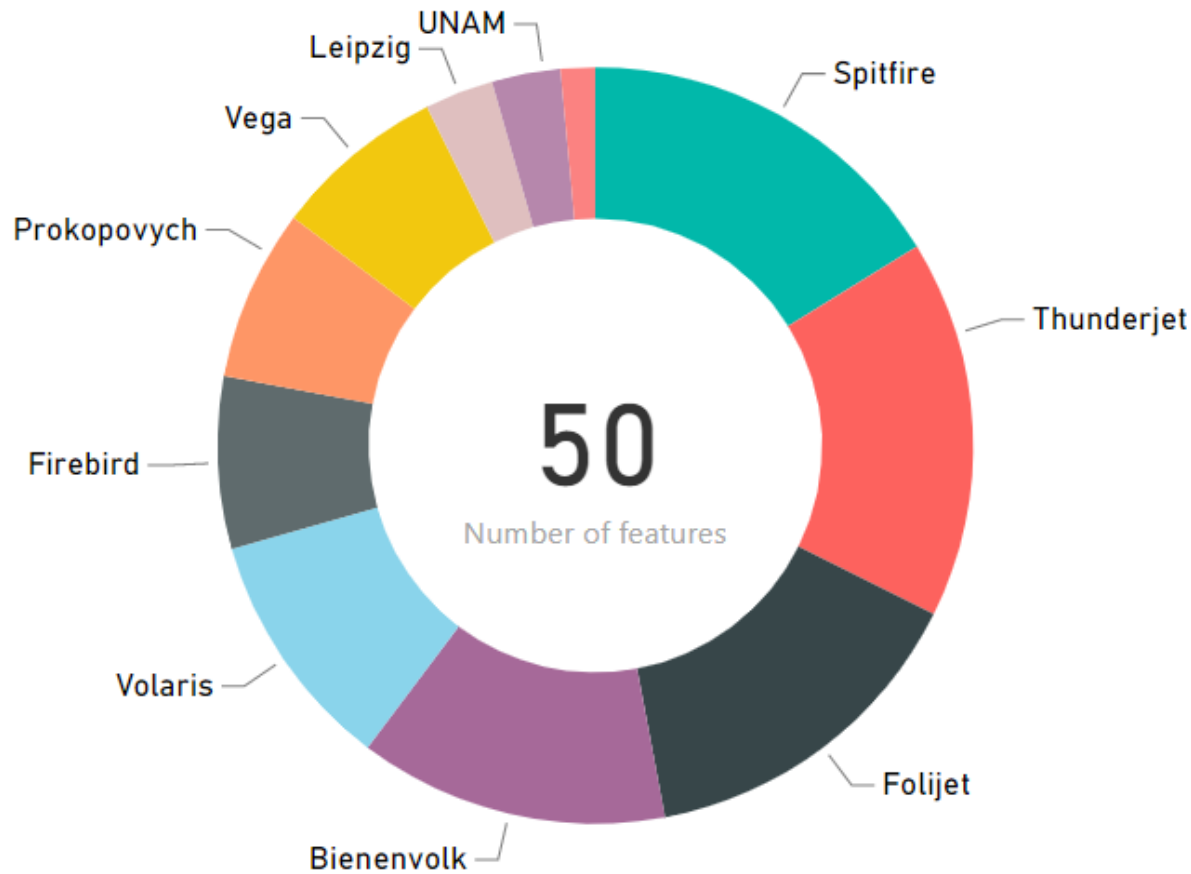
Morning Glory Features



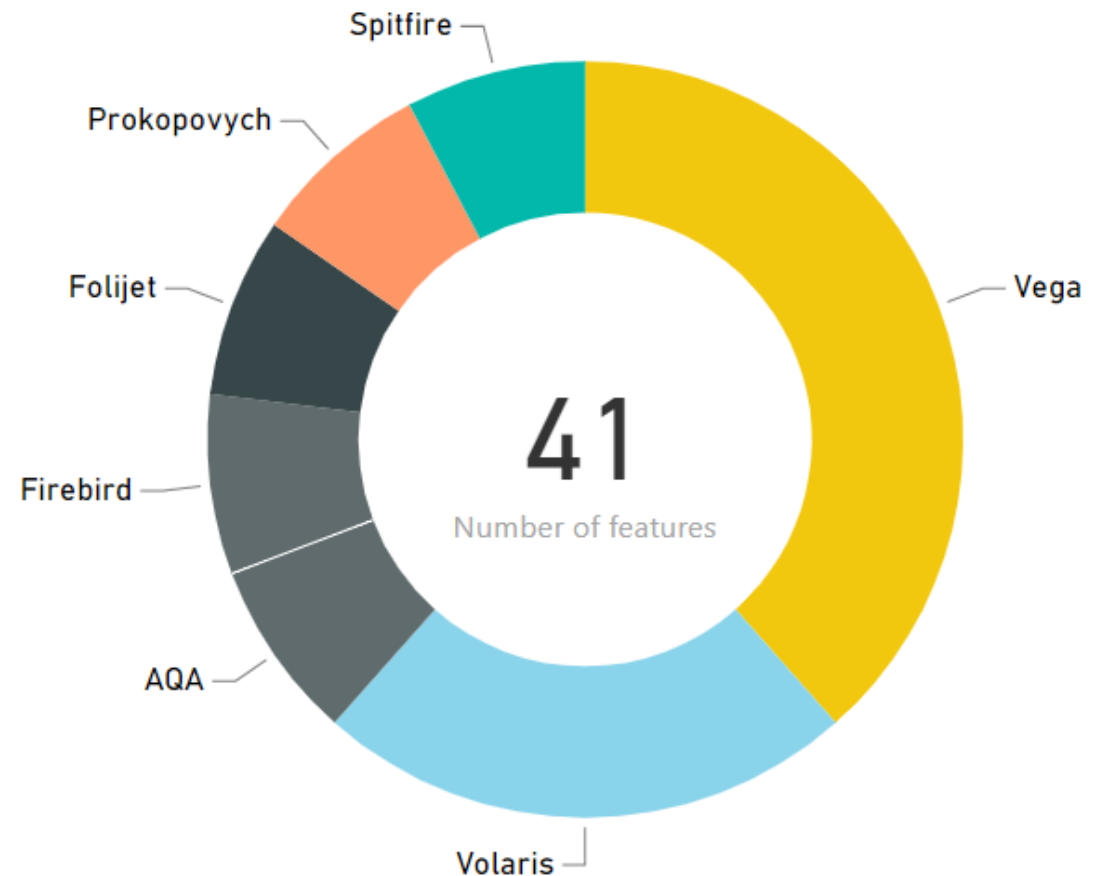


Dev teams have created not only new deliverable features. They have been focused on quality improvements tie to integration tests development, making automated end2end tests, tech debt and etc.

Morning Glory Functional Features



Morning Glory Non-Functional Features





During bug fest executed 2407 test cases – 190 in automated mode.
 Also 70 test cases were used for multitenant verification

R2037 Bug Fest Morning Glory (R2 2022)



- **1955 Passed**
88% set to Passed
- **1 Blocked**
0% set to Blocked
- **6 Retest**
0% set to Retest
- **14 Failed**
1% set to Failed
- **1 Unassigned**
0% set to Unassigned
- **1 Claimed**
0% set to Claimed
- **169 Deferred**
8% set to Deferred
- **0 Deferred Hot Fix**
0% set to Deferred Hot Fix

R2038 Bug Fest Morning Glory AUTOMATED (R2 2022)



- **175 Passed**
92% set to Passed
- **2 Blocked**
1% set to Blocked
- **0 Retest**
0% set to Retest
- **1 Failed**
1% set to Failed
- **0 Unassigned**
0% set to Unassigned
- **0 Claimed**
0% set to Claimed
- **2 Deferred**
1% set to Deferred
- **0 Deferred Hot Fix**
0% set to Deferred Hot Fix

R2039 Bug Fest Morning Glory MULTI-TENANT (R2 2022)

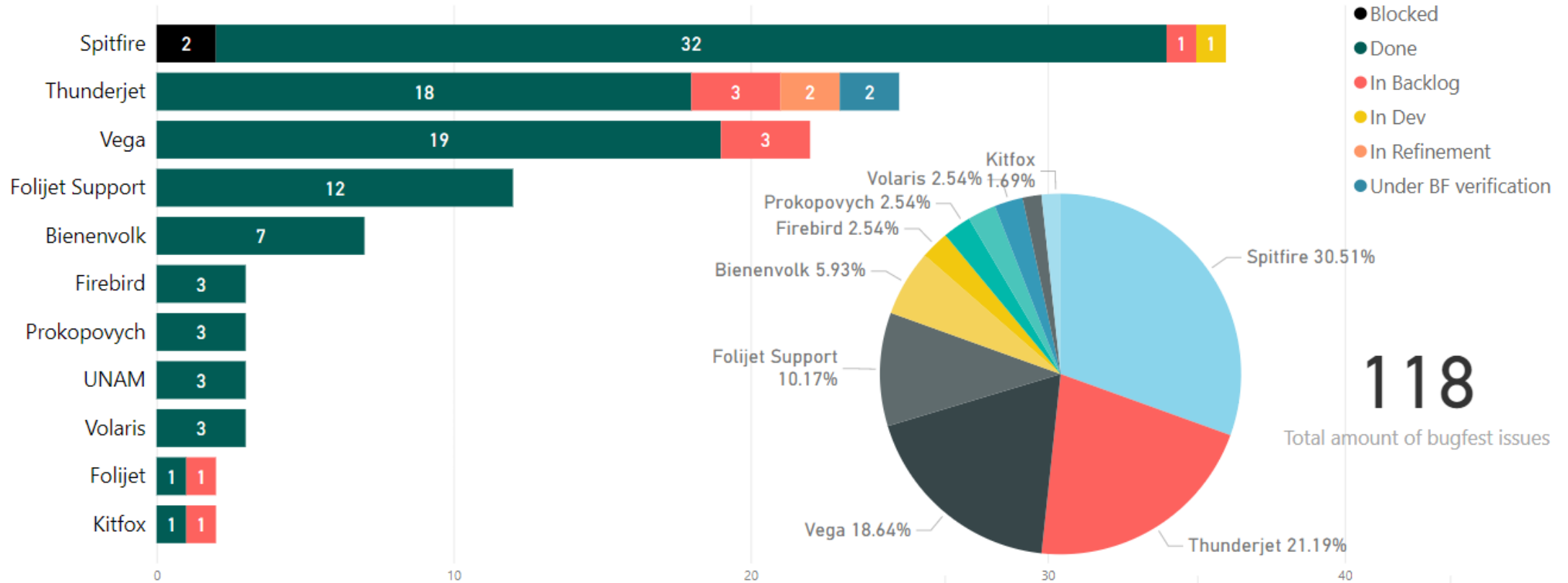


- **65 Passed**
93% set to Passed
- **0 Blocked**
0% set to Blocked
- **0 Retest**
0% set to Retest
- **2 Failed**
3% set to Failed
- **0 Unassigned**
0% set to Unassigned
- **0 Claimed**
0% set to Claimed
- **0 Deferred**
0% set to Deferred
- **0 Deferred Hot Fix**
0% set to Deferred Hot Fix



118 issues has been found while executing test cases by our testers

Morning Glory R2 2022 BugFest Issues



118

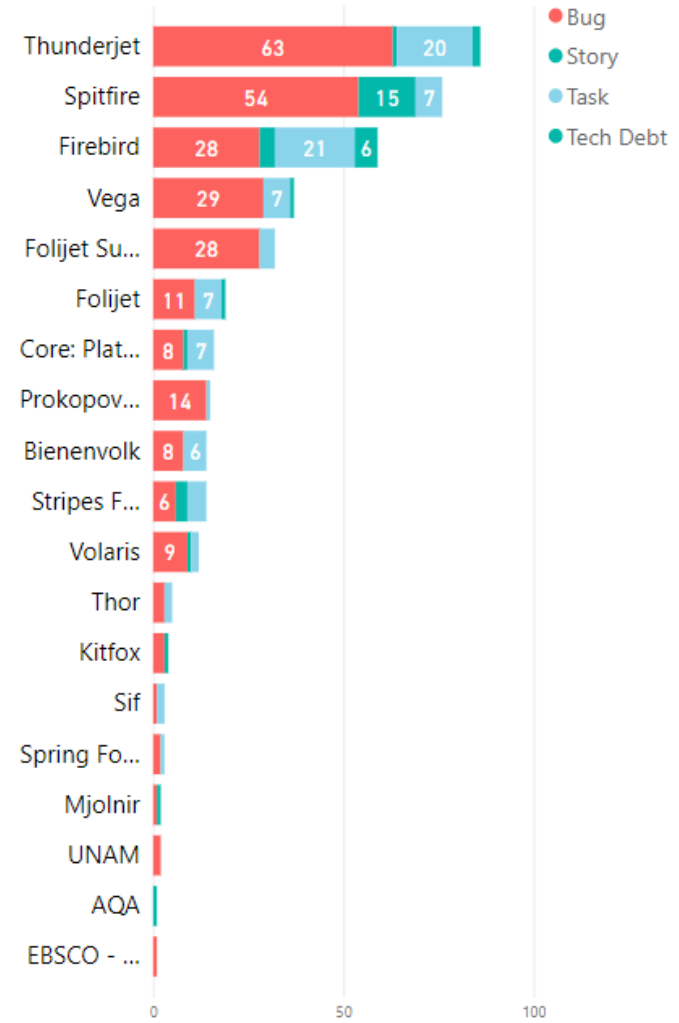
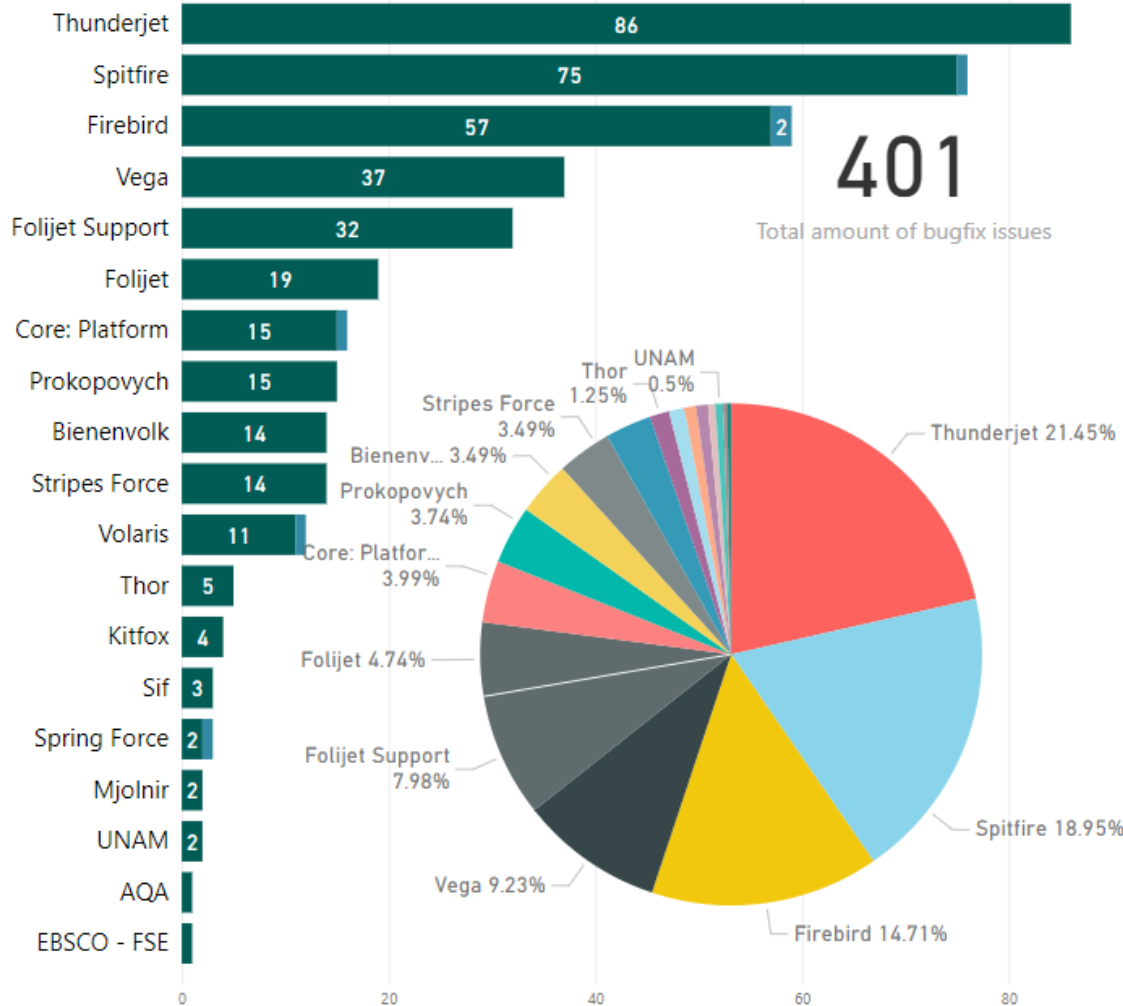
Total amount of bugfest issues



During bugfix period 401 issues were delivered as part of Morning Glory release: defects, stories, tasks and tech debt

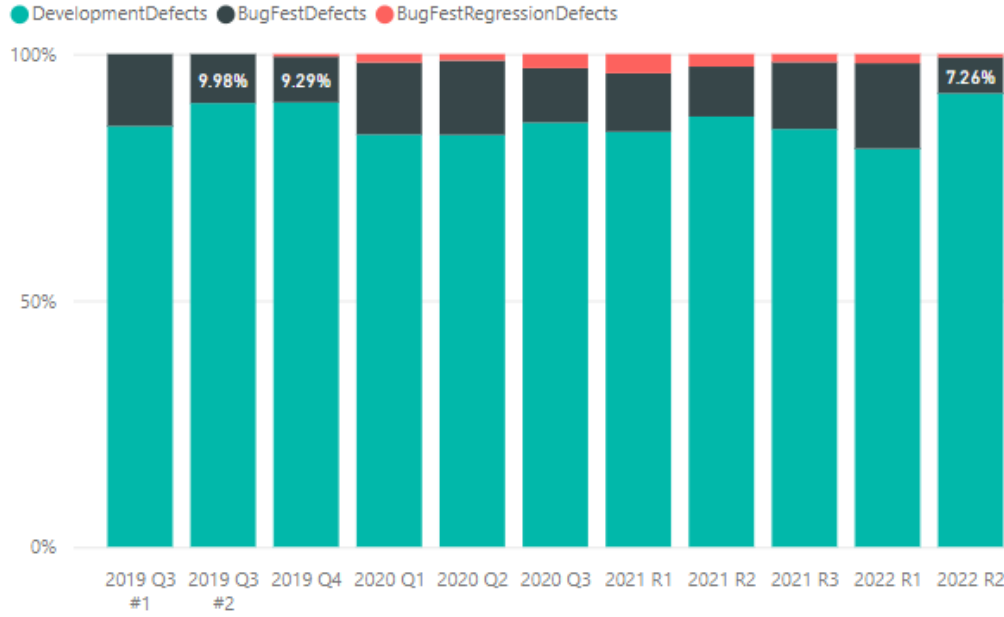
MG R2 2022 BugFix MustHave Issues

● Done ● Under BF verification

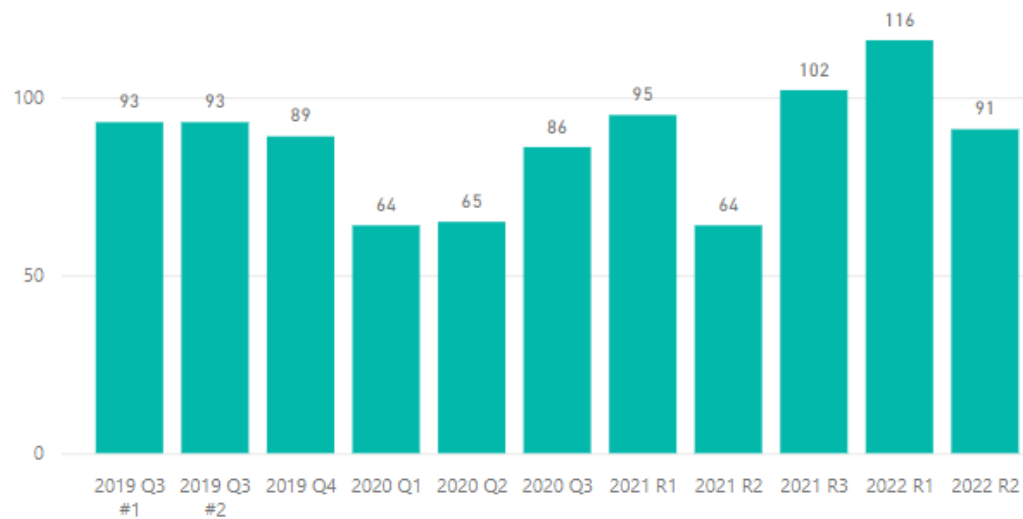




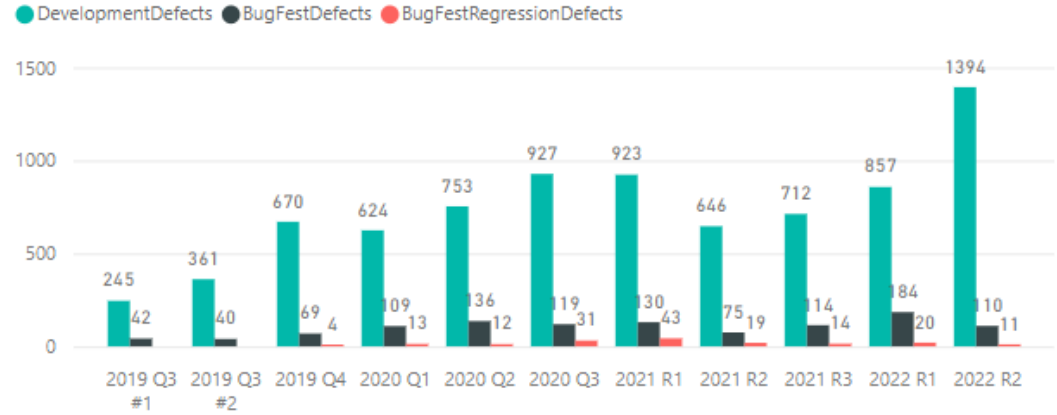
Defects in percentage at release



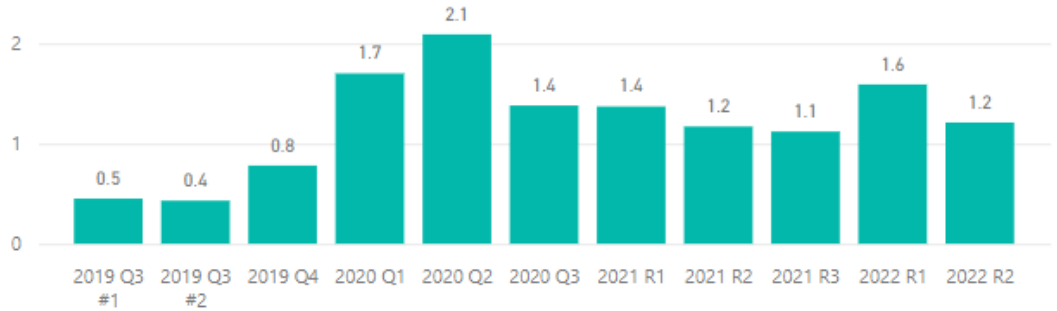
Features at release



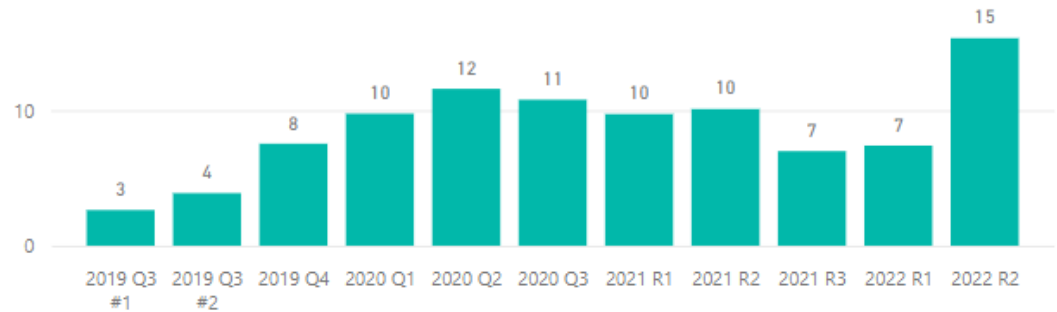
Defects count at release



Bugfest defects per feature at release



Development defects per feature at release





Thunderjet

UXPROD-3600

Manage Voucher Export without needing to access settings

PROBLEM






1. Users must be granted access to settings area to manage voucher exports.
2. Configuration of export settings is accessible to users that only need to run or download exports.

SOLUTION

Move Voucher exports from settings to invoice UI and add separate permissions for accessing this function.



WORK

- | | |
|--|--|
|  UINV-368 Add "Voucher export" to actions menu |  CLOSED |
|  UINV-369 Select batch group and display existing exports |  CLOSED |
|  UINV-370 Run manual export and display toast |  CLOSED |
|  UINV-371 Download batch export files from full screen view |  CLOSED |

UXPROD-3600



Manage Voucher Export without needing to access settings

The screenshot displays the 'Invoices' management interface. At the top, a navigation bar includes 'Invoices' (selected), 'Agreements', 'Bulk edit', 'Check in', 'Check out', 'Circulation log', 'Courses', 'Dashboard', 'Apps', and 'API'. Below this, the 'Invoices' section header is visible with a search prompt: 'Enter search criteria to start search'. On the left, a 'Search & filter' sidebar contains a dropdown menu set to 'All', a 'Search' button, a 'Reset all' button, and a list of filter categories: Status, Vendor name, Date created, Invoice date, Acquisition unit, Tags, Payment due, Payment method, Approval date, Source, Export to accounting, Payment date, Batch group, Fund code, Expense class, and Lock total. The main content area is currently empty, displaying the message: '← Choose a filter or enter a search query to show results.'

UXPROD-3203

Add additional functionality to GOBI mapping profiles



















PROBLEM

The GOBI integration currently provides configuration for populating limited number of Order and Order line data.

SOLUTION

- Add additional fields as potentially mappings for GOBI order data
- Add lookup translation for Account number and other necessary data points

WORK

 MODGOBI-129	Add acquisition unit and internal note fields to GOBI configur...		CLOSED
 MODGOBI-132	Adjust GOBI mapping for subaccount to perform lookup		CLOSED
 MODGOBI-135	Allow GOBI order key to be added as a product ID so it can b...		CLOSED
 MODGOBI-136	Add configuration to allow libraries to specify if a GOBI order ...		CLOSED
 MODGOBI-137	Invalid ISBN failing order line creation		CLOSED
 MODGOBI-152	Add additional PO/POL fields to GOBI configuration mapping		CLOSED
 MODGOBI-166	Move acq unit mapping logic in model to the translation object		CLOSED
 MODGOBI-167	Remove unusable fields from mapping		IN BUGFIX RE...



Update FOLIO<>EBSCONET order renewal logic

PROBLEM

When users choose not to renew material FOLIO is not able to cancel those orders. Notes that users add in the EBSCONET interface are not carried over to FOLIO

SOLUTION

Mapping order type data from EBSCONET to set order line status to cancelled when needed. Adding additional data mappings to capture notes.

WORK

	MODEBSNET-13 Update logic for supporting fund expense classes		CLOSED
	MODEBSNET-15 Dates are being input as 01/01/0001		CLOSED
	MODEBSNET-22 Support canceling POL(s) through EBSCONET integration		CLOSED
	MODEBSNET-27 Update logic for supporting "customer note" from EBSCON...		CLOSED
	MODEBSNET-30 Update logic for supporting "Renewal note" from EBSCONET		CLOSED
	MODEBSNET-33 Update logic for supporting "customer note" from EBSCON...		CLOSED
	MODEBSNET-39 Renewal note is blank after update		CLOSED
	MODORDERS-636 Update po lines when an order is closed with the "Cancell...		CLOSED
	MODORDERS-663 Update PO workflow status based on cancelation of POLs.		CLOSED
	MODORDERS-664 Release encumbrances when POL payment status is set t...		CLOSED
	MODORDERS-682 Remove Renewal date and renewal interval requirement f...		CLOSED
	MODORDERS-714 Fix issue with Receipt and Payment statuses when order i...		CLOSED
	UJQR-740 Add cancel POL action and display indication that POL is canceled.		CLOSED
	UJQR-889 Add cancel PO action and display indication that PO is canceled.		CLOSED
	UJQR-961 Renewal date and renewal interval no longer required		CLOSED
	UJQR-965 Display "Renewal note" field on POL		CLOSED

UXPROD-3619

Allow user to edit instance connection of POL



PROBLEM

When a purchase orders is connected to the wrong instance there is no way to correct it. Unopening orders to do this is can cause issues with the receiving workflow and existing order<>inventory record relationships.

SOLUTION

Add action that allows users to change connection between order line and instance. When changing connection FOLIO will update all related inventory records as needed.

WORK

	MODORDERS-683 Define new Business API for updating Instance Reference for Non-package orde...		CLOSED
	MODORDERS-684 Implement edit instance connection logic of POL - create inventory set to Instan...		CLOSED
	MODORDERS-685 Implement edit instance connection logic of POL - create inventory set to Instan...		CLOSED
	MODORDERS-718 PO Line details are not updating after changing instance connection from POL		CLOSED
	MODORDERS-730 Item not appearing under holdings after instance connection change		CLOSED
	MODORDSTOR-297 Define data model for supporting edit instance connection logic of POL		CLOSED
	MODORDSTOR-298 Define new Storage API for updating Instance Reference for Non-package ord...		CLOSED
	MODORDSTOR-299 Implement PATCH Storage API for updating Instance Reference for Non-packa...		CLOSED
	MODORDSTOR-311 Change instance updates POL details but not UUID and items not appearing		CLOSED
	UIOR-594 Edit instance connection of POL - create inventory set to Instance, holding or Instance, h...		CLOSED
	UIOR-936 Edit instance connection of POL - create inventory set to Instance or none		CLOSED
	UIOR-937 Display toast when Edit instance connection of POL is successful		CLOSED
	UIOR-942 Edit instance connection of POL - option to delete abandoned holdings		CLOSED
	UIOR-979 Instance connection of POL (integration with back end)		CLOSED



Allow user to edit instance connection of POL

Orders
Agreements
Bulk edit
Check in
Check out
Circulation log
Courses
Dashboard
Apps
API

Search & filter

Orders | Order lines

PO number
23436

Search

Reset all

Status

Closed

Open

Pending

Prefix

Suffix

Approved

Acquisition unit

Assigned to

Created by

Date created

Date opened

Order type

Vendor

Tags

Reason for closure

Re-encumber

Subscription

Orders
1 record found

PO number	Vendor code	Status	Order type
23436	ZAMAZON%	Open	One-Time

< Previous
1 - 1
Next >

Purchase order - 23436

Record last updated: 9/12/2022 3:13 PM

PO number	Vendor	Order type	Acquisition units
23436	AMAZON.COM	One-Time	-

Approval date	Assigned to	Bill to	Ship to
9/12/2022, 3:10 PM	-	CONVENTIONAL ORDERS Monographic Acquisitions Division Texas A&M University General Libraries 5000 TAMU College Station, TX 77843-5000	CONVENTIONAL ORDERS Monographic Acquisitions Division Texas A&M University General Libraries 5000 TAMU College Station, TX 77843-5000

Manual	Re-encumber	Created by	Created on
<input type="checkbox"/>	<input checked="" type="checkbox"/>	folio, admin	9/12/2022, 1:48 PM

Date opened
9/12/2022, 3:10 PM

Note
Check credit card statement to make sure payment shows up

PO summary

Total units	Approved	Workflow status
1	<input checked="" type="checkbox"/>	Open

UXPROD-3435

Export invoice data in delimited file format



PROBLEM

FOLIO is unable to provide the full scope of reporting required by institutional financial auditors. Users are not able to manipulate financial data in the UI.

SOLUTION

Extend the ability to export data in a delimited format to the Invoices app, using the same model implemented in the Orders app to extract invoices and their related record data.

WORK

UINV-366 Allow user to filter invoices by Amount range	<input type="radio"/>	CLOSED
UINV-367 Allow user to filter invoices by Fund and Expense class		CLOSED
UINV-383 Add "Export results (CSV)" action to invoice app		CLOSED
UINV-384 Allow user to select data points for Export results to CSV		CLOSED
UINV-385 Export invoice functionality - FE approach		CLOSED
UIPPOL-41 Fund and Expense class filters usage from stripes-acq-components		CLOSED
UISACQCOMP-84 Move Fund and Expense class filters to stripes-acq-components for common us...		CLOSED
UISACQCOMP-88 Create Number range filter	<input type="radio"/>	CLOSED



Export invoice data in delimited file format

The screenshot shows the 'Invoices' application interface. At the top, there is a navigation bar with various menu items: Invoices (with a dropdown arrow), Agreements, Bulk edit, Check in, Check out, Circulation log, Courses, Dashboard, Apps (with a dropdown arrow), and API (with a dropdown arrow). Below the navigation bar, the main interface is split into two sections. On the left is a 'Search & filter' sidebar, and on the right is the main 'Invoices' content area.

Search & filter sidebar:

- Search input field with a dropdown menu currently set to 'All'.
- Search button.
- Reset all button.
- Expandable sections for filtering:
 - Status:** Open, Reviewed, Approved, Paid, Cancelled.
 - Vendor name**
 - Date created**
 - Invoice date**
 - Acquisition unit**
 - Tags**
 - Payment due**
 - Payment method**
 - Approval date**
 - Source**
 - Export to accounting**
 - Payment date**
 - Batch group**
 - Fund code**
 - Expense class**

Main Invoices content area:

- Header: Invoices
- Sub-header: Enter search criteria to start search
- Actions button (with a dropdown arrow).
- Message: ← Choose a filter or enter a search query to show results.

UXPROD-3662

Export piece data in delimited file format



PROBLEM

Users are not able to review piece data for multiple titles at once in the UI. Receiving data cannot be printed easily from the UI.

SOLUTION

Extend the ability to export data in a delimited format to the Receiving app, using the same model implemented in the Orders app.

WORK

- | | |
|--|---------------------|
| UIREC-233 Add "Export results (CSV)" action to receiving app | CLOSED |
| UIREC-234 Allow user to select data points for Export results to CSV | CLOSED |
| UIREC-235 Export pieces functionality - FE approach | CLOSED |



Export piece data in delimited file format

The screenshot shows a web application interface for managing receiving orders. At the top, a dark navigation bar contains several menu items: "Receiving" (selected), "Agreements", "Bulk edit", "Check in", "Check out", "Circulation log", "Courses", "Dashboard", "Apps", and "API". Below this, the main content area is split into two sections. On the left is a "Search & filter" sidebar with a "Keyword" search box, a "Search" button, and a "Reset all" option. Below these are several filter categories, each with a dropdown arrow: "Order status" (with sub-options "Closed", "Open", "Pending"), "Vendor", "Order type", "Material type", "Order format", "Tags", "Location", "Receiving status", "Acquisition unit", "Rush", "Received date", "Expected receipt date", and "Receipt due". The right section of the main area is titled "Receiving" and contains the text "Enter search criteria to start search" and an "Actions" button. A large grey message in the center of the right section reads "← Choose a filter or enter a search query to show results." A mouse cursor is visible at the bottom right of the interface.

UXPROD-3620

The ability to EXPORT fund detail via csv file













PROBLEM

Users are not able to manipulate financial data in the UI. It is also difficult to print and share this data with colleagues who may not have access to FOLIO.

SOLUTION

Extend the ability to export data in a delimited format to the Finance app, using a slightly modified workflow to meet the unique requirements of Finance users.

WORK

 UIF-365 Display export action for ledger	 CLOSED
 UIF-366 User must select fiscal year and expense class settings for export	 CLOSED
 UIF-367 Start export budgets with confirmed settings	 CLOSED
 UIF-368 Create csv file with all budget data	 CLOSED
 UIF-384 In budget export - identify record type for common fields	 CLOSED



The ability to EXPORT fund detail via csv file

The screenshot displays the 'Finance' application interface. At the top, a navigation bar includes 'Finance' with a dropdown arrow, and several action buttons: 'Agreements', 'Bulk edit', 'Check in', 'Check out', 'Circulation log', 'Courses', 'Dashboard', 'Apps' with a dropdown arrow, a help icon, and 'API' with a dropdown arrow. Below the navigation bar, the main content area is split into two sections. The left section, titled 'Search & filter', contains a filter menu with tabs for 'Fiscal year', 'Ledger', 'Group', and 'Fund'. The 'Ledger' tab is selected. Below the tabs is a dropdown menu currently set to 'All', a 'Search' button, and a 'Reset all' button. Underneath, there are filter sections for 'Status' (with options for Active, Frozen, and Inactive) and 'Acquisition unit'. The right section, titled 'Ledger', has a search input field with the placeholder text 'Enter search criteria to start search' and a 'New' button. A message in the center of the right section reads: '← Choose a filter or enter a search query to show results.'



Firebird

Bulk edit



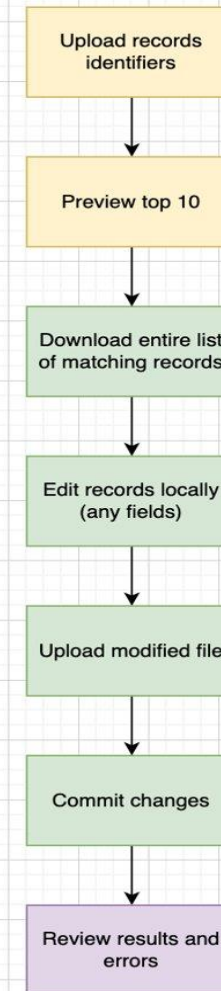
PROBLEM

FOLIO does not support bulk edit of the records and any changes in them need to happen for each record separately. [UXPROD-868](#)

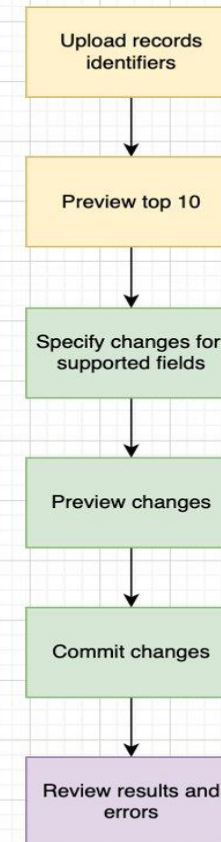
SOLUTION

New FOLIO module called “Bulk edit” where users can perform bulk edit operations with support of 2 approaches: CSV approach for User records and In-app approach for item records. CSV approach is powerful, but designed for power users familiar with FOLIO's data structure. In-app approach, preferred by the community, guides users through the bulk edit process.

CSV approach



In-app approach



Find records video



The screenshot shows the FOLIO Bulk edit interface. The browser address bar displays `bugfest-mg.int.aws.folio.org/bulk-edit?capabilities=USERS`. The top navigation bar includes links for Agreements, Bulk edit, Check in, Check out, Circulation log, Courses, Dashboard, Data export, Data import, eHoldings, Apps, and API. The main interface is divided into a sidebar on the left and a main workspace on the right.

Set criteria sidebar:

- Two tabs: **Identifier** (selected) and **Query**.
- Record identifier:** A dropdown menu with the text "Select record identifier".
- A dashed box containing the text "Drag and drop or choose file" and "Select a file with record identifiers".
- Record types:** A section with a caret icon and two radio buttons: **Users** (selected) and **Inventory - items**.

Main workspace:

- Header: **Bulk edit** with the subtitle "Set criteria to start bulk edit" and an **Actions** dropdown.
- Content: A large empty area with a left-pointing arrow and the text "Select a 'record identifier' when on the Identifier tab. Enter a 'search query' when on the Query tab".

UXPROD-3523

Bulk Edit - in app approach - item locations



PROBLEM

Currently all location changes need to be made one by one and the changes of the items locations are very frequent as the items are being taken on or off reserve, display or new books

SOLUTION

- Have the ability to scan a bunch of materials (maybe during check-in) and then perform a batch change on all the item records (e.g. change location, change item status, or update damaged field)
- Have the ability to identify a batch of item records with the same characteristic (e.g. temporary location = course reserve) and change them (e.g. remove the temp location)

IN SCOPE

- Identify records that will be updated based on item barcode, current location, etc
- Identify records that will be updated based on the query
- Add, remove and modify items temporary and permanent locations
- Provide a feedback about encountered errors
- Provide ways to address the errors

UXPROD-3523

Bulk Edit - item locations



PROBLEM

Currently all status transitions need to be made one by one and the changes of the items statuses are frequent as the items can be moved to another location, included in the exhibition, etc.

SOLUTION

- Have the ability to change status to "Unavailable" when the books are being included in the exhibition
- Have the ability to change status to "Restricted" when the items were moved to remote location

IN SCOPE

- Identify records that will be updated based on item barcode, current location, etc
- Add, remove and modify items temporary and permanent locations
- Provide a feedback about encountered errors
- Provide ways to address the errors

Edit inventory video



Bulk edit - FOLIO

bugfest-mg.int.aws.folio.org/bulk-edit/6aaf30c8-fac7-4472-9d8c-411f116d9a8c/initial?capabilities=ITEMS&fileName=26_items_barcode.csv&identifier=BARCODE

Bulk edit | Agreements | **Bulk edit** | Check in | Check out | Circulation log | Courses | Dashboard | Data export | Data import | eHoldings | Apps | API

Bulk edit 26_items_barcode.csv | 27 records match | Actions

Set criteria

Identifier | Query

Record identifier: Item barcode

Drag and drop or choose file

Select a file with item barcode

Record types: Users | Inventory - items

Filename: 26_items_barcode.csv

Preview of record matched

Barcode	Status	Item effective location	Effective call number	Item HRID	Material type	Permanent loan type	Temporary loan type
099063663	Available	A copy of another location	T2 242	it7587171	book	buo	
36362940	Available	A copy of another location	PL2277.C59445 1983	it3368495	book	stks	
64280588	Available	A copy of another location	PS3503.I785 Z666 2003	it7529931	book	stks	
64570901	Available	A copy of another location	PM4267.Z5 Q96 2001	it7537649	book	stks	
099063697	Available	A copy of another location	T2 242	it7587173	book	buo	
59529436	Available	A copy of another location	TR645.A33U57	it7333451	book	stks	
099063671	Available	A copy of another location	T2 242	it7587170	book	buo	
54703434	Available	A copy of another location	PL856.I875K35 1978	it6935948	book	stks	
65690199	Available	A copy of another location	PG3791.31.L77 D48 2003	it7567815	book	stks	
099063702	Available	A copy of another location	T2 242	it7587174	book	buo	

Errors

26_items_barcode.csv: 28 entries * 27 records matched * 1 errors

Record identifier	Reason for error
A1429864347	No match found

New bulk edit

UXPROD-3318

Bulk Edit - users



PROBLEM

FOLIO does not support bulk edit of the user records and any changes in them need to happen for each record separately.

SOLUTION

- Change e-mail address for all affected users when the institution domain changes
- Bulk edit expiration date for users. Criteria: Patron group, current expiration date, Blocking status, Department, Custom fields, etc.
- Bulk edit Patron blocks based on a list/file of users to be uploaded.
- Etc.

IN SCOPE

- Save the file with the records that match the search criteria
- Upload the modified file so that the changes are posted
- Handle exceptions
- Notify user about the exceptions

Edit users video



Bulk edit - FOLIO

bugfest-mg.int.aws.folio.org/bulk-edit/e7e2d99a-86fd-445f-8dc8-686bdd617dda/initial?capabilities=USERS&fileName=21_User_barcode.csv&identifier=BARCODE

Bulk edit Agreements Bulk edit Check in Check out Circulation log Courses Dashboard Data export Data import eHoldings Apps API

Set criteria **Bulk edit 21_User_barcode.csv** 19 records match **Actions**

Identifier Query

Record identifier User Barcodes

Drag and drop or choose file

Select a file with User Barcodes

Record types

- Users
- Inventory - items

Filename: 21_User_barcode.csv

Preview of record matched

Status	Last name	First name	Barcode	Patron group	Username
Active	Jacobs	Betty	0000049872	Bindery Charges	username:49872
Active	Sparrow	Evan	0000049874	UC Staff, Quarter	username:49874

MG_features

File Home Share View

Pin to Quick access Copy Paste Cut Copy path Paste shortcut Move to Copy to Delete Rename New folder Easy access Properties Edit History Select all Select none Invert selection Select

Clipboard Organize New Open

This PC > Local Disk (C:) > Users > vladi > Documents > MG_features

Name	Date modified	Type	Size
21_User_barcode.csv	15.09.2022 1:08	Файл Microsoft E...	1 KB
26_items_barcode.csv	14.09.2022 17:47	Файл Microsoft E...	1 KB
2022-09-14-Errors-21_User_barcode.csv	15.09.2022 1:09	Файл Microsoft E...	1 KB
2022-09-14-Matched-Records-21_User_b...	15.09.2022 1:09	Файл Microsoft E...	7 KB

4 items 1 item selected 6,99 KB

2022-09-14-Errors-....csv 2022-09-14-Match...csv Show all



Folijet

UXPROD-3623

Refine Data Import Field protection



PROBLEM

1. MARC field protection settings are honored only when there is an explicit Update SRS MARC Bib action
2. Overriding of field protections don't work

SOLUTION

- Honor settings when the profile has Update Instance action
- Account for repeatable and non-repeatable fields properly
- Confirm that protected fields can be removed from an incoming record at the end of a job (e.g. remove 856s)
- Also fixes the overriding of field protections

WORK

1. MODDICORE-146 SPIKE: Instance & SRS record updates need to honor MARC field protections
2. MODDICORE-248 MARC field protections apply to MARC modifications of incoming records when they should not
3. MODDICORE-265 Implement method to update record fields according to field protections
4. MODINV-686 Add source record preparation before mapping to instance for instance update

UXPROD-3471

Implement flow control for Data Import



PROBLEM

Single Record Imports takes excessive time to complete when a large Data Import job is running

SOLUTION

Pause Consumer in SRM that consumes events published by mod-data-import, which allows for records coming through API of SRM (OCLC single record imports) to be processed. It is configurable how often the Consumer can be paused

WORK

1. ARCH-14 SPIKE: Investigate opportunity to not take extended time for OCLC single record import while large file is importing
2. MODSOURMAN-690 SPIKE: Review impact on MDCPCT and UIIN
3. KAFKAWRAP-18 Add implementation pause/resume methods to support DI flow control
4. MODSOURMAN-662 Implement flow control logic in SRM for Kafka messages processing
5. MODSOURMAN-796 Change logic to initialize job execution progress after reading file instead of processing the first chunk



Implement flow control for Data Import

Data import

[Agreements](#)
[Bulk edit](#)
[Check in](#)
[Check out](#)
[Circulation log](#)
[Courses](#)
Data import
[Data export](#)
[Dashboard](#)
[eHoldings](#)
Apps ▾
? Online ▾

Drag and drop to start a new data import job

or choose files

	File name	Status	Records	Job profile	Started running	Ended running ▾	Run by	ID
<input type="checkbox"/>	C17027 autoTestFile.966.5450930044037485.mrc	Completed	1	autotest_job_profile_85.75664169300312485	9/20/2022, 7:15 PM	9/20/2022, 7:16 PM	DIKU ADMINISTRATOR	19
<input type="checkbox"/>	Test_auth_id_when_browse_contributors_scenario_2 (1).mrc	Completed with errors	1	Default - Create SRS MARC Authority	9/20/2022, 6:43 PM	9/20/2022, 6:43 PM	DIKU ADMINISTRATOR	18
<input type="checkbox"/>	oneMarcBib_edited.mrc	Completed	1	C17027 job profile.801.47610420226701	9/20/2022, 6:29 PM	9/20/2022, 6:29 PM	DIKU ADMINISTRATOR	17
<input type="checkbox"/>	Test_auth_id_when_browse_contributors_scenario_2 (1).mrc	Completed with errors	1	Default - Create SRS MARC Authority	9/20/2022, 6:17 PM	9/20/2022, 6:18 PM	DIKU ADMINISTRATOR	16
<input type="checkbox"/>	CornellComplexExamplesAuth.mrc	Completed	18	Default - Create SRS MARC Authority	9/20/2022, 6:08 PM	9/20/2022, 6:09 PM	DIKU ADMINISTRATOR	14
<input type="checkbox"/>	Test_auth_id_when_browse_contributors_scenario_2 (1).mrc	Completed with errors	1	Default - Create SRS MARC Authority	9/20/2022, 6:07 PM	9/20/2022, 6:08 PM	DIKU ADMINISTRATOR	13
<input type="checkbox"/>	Test_auth_id_when_browse_contributors_scenario_2 (1) (1).mrc	Completed with errors	1	Default - Create SRS MARC Authority	9/20/2022, 6:07 PM	9/20/2022, 6:07 PM	DIKU ADMINISTRATOR	12
<input type="checkbox"/>	Test_auth_id_when_browse_contributors_scenario_2 (1) (1).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/20/2022, 3:07 PM	9/20/2022, 3:09 PM	DIKU ADMINISTRATOR	1

Running

No running jobs to show

▶ End of list

Stop Recording
Blue Recorder
✕

Videos ▾

MP4 (MPEG-4 Part 14) ▾

Select a Window
Select an Area

Record Video
 Record Audio

Frames: - +

Show Mouse
 Follow Mouse

Delay: - +

Audio Input Source: Default PulseAudio Input Source ▾

Run Command After Recording:

UXPROD-3429

Data import Stability/Reliability/Performance work



PROBLEM

1. Handling of duplicate events when record processing is finished can cause confusing information in DI log
2. Retrieving DI log entries takes excessive time

SOLUTION

- Skip sending of DI_ERROR events in case of duplicates
- Improve performance for SQL query to retrieve log entries
- Remove JobExecution cache

WORK

1. MODINVSTOR-894 Create Instance Optimization
2. MODDICORE-254 , MODINV-664 Add logic to skip sending DI_ERROR from mod-inventory in case for duplicates - Morning Glory
3. MODSOURMAN-710 [100k-500k imports] Improve performance of sql query for retrieving log entries for particular job execution
4. MODSOURMAN-792 Fix Race Conditions During Mapping Parameter Initialization
5. MODSOURMAN-791 Reduce Conversion of Parsed Content Into A MARC4J Record



Enhancements to the Data Import

PROBLEM

1. Users must be able to delete specific logs
2. Users must be able to see a summary of the results of an import job without having to scroll through all the records in a file
3. The error counts in the individual job summary should be displayed as hotlinks, so that the list of records in the file can be filtered to only show particular errors
4. When viewing long logs, users want to have pagination instead of "Load more"
5. When viewing a list of logs, users want different status terms for jobs that were stopped/failed by FOLIO versus jobs that were manually stopped by users

SOLUTION

- Add ability to delete logs, add checkboxes to be able to select several/all logs
- Implement job summary at top of log details
- Add filter to only view errors
- Adjusted some error language
- Add new "Cancelled by user" status for jobs that are stopped manually
- Style updates, for consistency:
 - Implement pagination (instead of Load more) for Log list and Large imports
 - Adjust hotlinks UI/UX



Enhancements to the Data Import

Data import
Data import | Inventory | Orders | Settings

	Logs Actions								
Jobs	<input type="checkbox"/> File name	Status	Records	Job profile	Started running	Ended running	Run by	ID	
<div style="border: 1px dashed gray; padding: 10px; text-align: center; margin-bottom: 10px;"> Drag and drop to start a new data import job or choose files </div> <p>Running</p> <p style="color: gray;">No running jobs to show</p> <p style="color: gray;">End of list</p>	<input type="checkbox"/>	1 record - Copy (11).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	84
	<input type="checkbox"/>	1 record - Copy (9).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	73
	<input type="checkbox"/>	1 record - Copy (10).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	76
	<input type="checkbox"/>	1 record - Copy (11) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	88
	<input type="checkbox"/>	1 record (2).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	78
	<input type="checkbox"/>	1 record - Copy (10) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	89
	<input type="checkbox"/>	1 record (2) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	83
	<input type="checkbox"/>	1 record - Copy (5).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	61
	<input type="checkbox"/>	1 record - Copy (12).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	85
	<input type="checkbox"/>	1 record (4) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	77
	<input type="checkbox"/>	1 record - Copy (9) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	74
	<input type="checkbox"/>	1 record - Copy (4).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	64
	<input type="checkbox"/>	1 record (3) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	90
	<input type="checkbox"/>	1 record - Copy (5) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	75
	<input type="checkbox"/>	1 record - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	82
	<input type="checkbox"/>	1 record - Copy (7) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	67
	<input type="checkbox"/>	1 record - Copy (6).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	59
	<input type="checkbox"/>	1 record - Copy (3).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	69
	<input type="checkbox"/>	1 record - Copy (8).mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	66
	<input type="checkbox"/>	1 record - Copy (2) - Copy.mrc	Completed	1	Default - Create instance and SRS MARC Bib	9/19/2022, 11:49 AM	9/19/2022, 11:50 AM	Maksym Rutkovskiy	70

UXPROD-3649

Match on POL and VRN to update related Inventory



PROBLEM

Users must be able to use the Order POL or any of the POL's Vendor Reference Numbers to Match to related Inventory Instances, Holdings, and Items, to be able to update them with Shelfready MARC data

SOLUTION

To add options for matching to an Inventory Instance Holdings and Items based on Purchase order line numbers (POLs) or Vendor reference numbers (VRNs) associated with it.

WORK

1. UIDATIMP-1046 Update match screen UI for Instances
2. UIDATIMP-1047 Update match screen UI for Holdings
3. UIDATIMP-1048 Update match screen UI for Items
4. UIDATIMP-1052 Check for accessibility issues on updated match screens and fix
5. UIDATIMP-1161 Update Data import UI permission for POL/VRN

UXPROD-3649



Match on POL and VRN to update related Inventory

Orders ▾
Data import Inventory **Orders** Settings ?

Search & filter <

Orders Order lines

Keyword
10005

Search

⊗ Reset all

- ^ Status
 - Closed
 - Open
 - Pending
- ^ Prefix
- ^ Suffix
- ^ Approved
- ^ Acquisition unit
- ^ Assigned to
- ^ Created by
- ^ Date created
- ^ Date opened
- ^ Order type
- ^ Vendor
- ^ Tags
- ^ Reason for closure
- ^ Re-encumber
- ^ Subscription
- ^ Renewal date
- ^ Manual renewal
- ^ Review period
- ^ Bill to
- ^ Ship to

Orders
0 records found
Actions ▾

🔍 No results found for "10005". Please check your spelling and filters.

Purchase order - 10007
Actions ▾ 1

Collapse all

^ **Purchase order**

Record last updated: 9/19/2022 9:55 AM

PO number	Vendor	Order type	Acquisition units
10007 📄	GOBI Library Solutions	One-Time	-
Approval date	Assigned to	Bill to	Ship to
9/19/2022, 9:55 AM	-	-	-
Manual	Re-encumber	Created by	Created on
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rutkovskyy, Maksym	9/19/2022, 9:47 AM
Date opened	9/19/2022, 9:55 AM		
Note	Check credit card statement to make sure payment shows up		

^ **PO summary**

Total units	Approved	Workflow status
1	<input checked="" type="checkbox"/>	Open
Total estimated price	Total encumbered	Total expended
\$18.00	\$18.00	\$0.00

^ **PO lines** **Actions** ▾

POL number	Title or package name	Product ID	Vendor reference number	Fund code	Estim.
10007-1	These Englands	2131231	123444	AFRICAHIST	\$18.00

🔍 End of list

^ **Related invoices**

The list contains no items

UXPROD-2892



Data Import: Add Administrative note to Instance, Holdings, and Items

PROBLEM

Users need to enter notes that describe decisions, why they were made, variations from standard procedures, etc. The Inventory Instance notes are often controlled by the underlying MARC record, and they relate to the bibliographic description. This note field would live in the administrative section of the record and would not be controlled by any underlying source record. It may be useful to include in Instances, Holdings, and Items.

SOLUTION

Add Admin note field to the filed mapping profile Create/Edit screen for the Instances, Holdings, and Items record types.

WORK

1. [UIDATIMP-1118](#) Add Admin note field to the Instance field mapping profile: Create/Edit
2. [UIDATIMP-1119](#) Add Admin note field to the Holdings field mapping profile: Create/Edit
3. [UIDATIMP-1120](#) Add Admin note field to the Item field mapping profile: Create/Edit
4. [UIDATIMP-1121](#) Add Admin note field to the Instance field mapping profile: View
5. [UIDATIMP-1122](#) Add Admin note field to the Holdings field mapping profile: View
6. [UIDATIMP-1123](#) Add Admin note field to the Item field mapping profile: View



Data Import: Add Administrative note to Instance, Holdings, and Items

Settings
Data import Inventory Settings

Settings

- Data import

System information

Software versions

Data import

- Job profiles
- Match profiles
- Action profiles
- Field mapping profiles

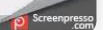
Other

- File extensions
- MARC field protection

Field mapping profiles
23 field mapping profiles

	Name ^	FOLIO record type	Tags	Updated	Updated by
<input type="checkbox"/>	Create Simple holdings	Holdings	-	9/19/2022	Maksym Rutkovskiy (@Maksym)
<input type="checkbox"/>	Create Simple instance	Instance	-	9/19/2022	Maksym Rutkovskiy (@Maksym)
<input type="checkbox"/>	Create Simple item	Item	-	9/19/2022	Maksym Rutkovskiy (@Maksym)
<input type="checkbox"/>	Default - Amalivre monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Casalini monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - CNPIEC monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Coutts monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Create instance	Instance	-	4/13/2021	System
<input type="checkbox"/>	Default - Create MARC Authority	Authority	-	10/8/2021	System
<input type="checkbox"/>	Default - EBSCO serials invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Erasmus monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - GOBI monograph invoice	Invoice	-	1/14/2021	System
<input type="checkbox"/>	Default - Harrassowitz serials invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Hein serials invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Midwest monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - Nardi monograph invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default - WT Cox serials invoice	Invoice	-	3/1/2021	System
<input type="checkbox"/>	Default Create MARC holdings and Inventory holdings	Holdings	-	8/5/2021	System
<input type="checkbox"/>	Inventory Single Record - Default Create Instance	Instance	-	11/24/2020	System

folio-snapshot.dev.folio.org/settings/data-import/mapping-profiles/view/950d9436-6a96-40f6-94c8-9ae39aef26e4?...





Vega

UXPROD-1796

Title Level Requests Complete (part 1)



PROBLEM

In addition to item-level requests which require a particular item to be specified, users need to be able to place a title-level request (TLR) and let FOLIO to decide which item should fulfill it.

SOLUTION

1. TLR feature was implemented. It allows users to create title-level requests of any type (Page, Hold, Recall) while keeping the existing item-level requests functionality.
2. The request queue has been changed to include requests of both levels.
3. EDS integration has been switched to using "true" TLR.

WORK

1. UIREQ-619 Create item level request from item record
2. UIREQ-630 View & reorder requests (first accordion)
3. UIREQ-635 Turn an item level request into a title level request
4. CIRC-1296 Consider title-level requests during checkin
5. CIRC-1297 Consider title-level requests during checkout
6. CIRC-1298 Consider title-level requests during request queue management
7. CIRC-1358 Link page TLR to the item on creation
8. CIRC-1359 Link item to hold TLR when checked in

UXPROD-3330

Title Level Requests Complete (part 2)



PROBLEM

1. When possible, a request policy should affect a title-level request in the same way it affects an item-level requests
2. It should be possible to enable and disable TLR feature while having open requests.

SOLUTION

1. TLR is now considering request policies for Page and Recall request types
2. A tool has been created to allow users to run migration jobs that recalculate request positions in queues after TLR feature is enabled or disabled

WORK

1. CIRC-1576 Consider request policy when TLR is placed
2. CIRCSTORE-329 Implement TLR feature toggle job service
3. UIREQ-722 Add success toast to Requests
4. UIREQ-728 Move page requests to first accordion of unified queue when reordering
5. UIREQ-747 Add success toast to duplicated Requests
6. UIREQ-757 Ensure Request details # (# requests) shows correct data
7. UIREQ-767 TLR: Add Move request to Action list when item is attached to title level request for fulfillment

UXPROD-3330

Data migration required by title level requests



PROBLEM

Existing request structure didn't allow to implement title-level request without major changes in the request schema which would affect the existing item-level request functionality, including EDS integration

SOLUTION

1. Data migration mechanism to change data structure of the existing requests has been created
2. The existing item-level request functionality was changed to make it work with the new data structure

WORK

1. CIRC-1287 Implement Request data migration (business logic)
2. CIRCSTORE-295 Implement Requests data migration
3. CIRCSTORE-301 Adapt API to the data migration changes
4. CIRCSTORE-307 Test Requests data migration performance

UXPROD-3402

Title look-up for Requests (title level requests)



PROBLEM

Title look-up is not available when creating a new request (title level) from outside of Inventory (Users, Requests)

SOLUTION

Added possible for use title look-up plugin for title level requests

WORK

1. UIREQ-675 Add title look-up to new request form
2. UIPFI-91 Add possible for reuse title look-up plugin for title level requests



Title Level Requests Complete

The screenshot shows a web application interface with a dark top navigation bar. The bar contains a gear icon followed by the word "Settings" in white. To the right of "Settings" are several menu items with icons: "Agreements" (purple circle with white checkmark), "Bulk edit" (blue square with white pencil), "Check in" (green square with white left arrow), "Check out" (red square with white right arrow), "Circulation log" (yellow square with white right arrow), "Courses" (orange square with white book), "Data import" (blue square with white up arrow), "Data export" (purple square with white down arrow), "Dashboard" (white square with red and blue grid), "Apps" (white square with four small squares), a question mark icon, and "Online" (white square with a person icon). Below the navigation bar, the main content area is titled "Settings" and "Choose settings". On the left side of this area is a vertical list of settings categories, each with a small icon: "Acquisition units" (blue square with white book), "Agreements" (purple circle with white checkmark), "Calendar" (red square with white calendar), "Circulation" (yellow square with white right arrow), "Courses" (orange square with white book), "Data export" (purple square with white down arrow), "Data import" (blue square with white up arrow), "Developer" (dark grey square), "eHoldings" (red square with white book), "ERM comparisons" (orange square with white book), "eUsage" (blue square with white book), "Finance" (dark grey square with white book), "GOBI integration" (dark grey square), "INN-Reach" (orange square with white book), "Inventory" (brown square with white book), "Invoices" (dark grey square with white book), "LDP" (green square with white book), "Licenses" (yellow square with white book), "Local KB admin" (purple square with white book), "My profile" (dark grey square), and "My profile" (dark grey square). The rest of the main content area is empty white space.



Spitfire

UXPROD-3345

Match on POL and VRN to update related Inventory



PROBLEM

Users must be able to use the Order POL or any of the POL's Vendor Reference Numbers to Match to related Inventory Instances, Holdings, and Items, to be able to update them with Shelfready MARC data

SOLUTION

Implemented logic of matching entities based on POL number stored in 024\$a, 924\$a, 935\$a, 980\$a MARC fields. The Creation of a default profile was not considered in the scope of implementation, so a user should create this profile by himself, specifying in Match Profile the existing field pointing to POL.

WORK

1. MODSOURMAN-778 Add permission for Purchase Order Lines matching
2. MODSOURCE-446 SPIKE & Implementation: Extend MARC-MARC matching to 9xx and 0xx fields
3. MODINV-578 Match logic for POL matches to Inventory records
4. MODINV-577 Match logic for VRN matches to Inventory records
5. MODDATAIMP-677 Add permission for Purchase Order Lines matching
6. MODDATAIMP-399 SPIKE: Allow POL or Vendor Ref Number match to trigger updates for related Instance, Holdings, Item(s), and SRS MARC

UXPROD-3345 - Match on POL and VRN to update related Inventory

Import bookmarks... OPSWAT Client Rem... env folio bcp folio-org/Folio-api-tes... Course | SSP | eLearn epam

Copy and paste the contents of an archive below.

```
'Alexander Girard, Architect: Creating Midcentury Modern Masterpieces' by Deborah Lubera Kawsy is
the first comprehensive study of Girard's exceptional architectural projects, specifically those
concentrated in the ultra-traditional Detroit suburb of Grosse Pointe.
DES-STACKS$IS033256410
KONORDER$ZBPCAT$a10008-1$b39.99$e39.99$f619489$g1$a40028264771$aDSFIR-APRV
eYANKEE
```

Clear Submit

1 record found.

1.

```
1.
LDR 01463cam 2200253M 4500
001 on1023393630
003 OCoLC
005 20180601034310.5
008 180209s2018 miu 000 0 eng d
040 __ $aERASA$beng$cERASA$dBTCTA$dYDX$dBDX
019 __ $a1001319709$a1001456369
020 __ $a9780814343654
020 __ $a0814343651
035 __ $a(OCoLC)1023393630$z(OCoLC)1001319709$z(OCoLC)1001456369
082 04 $a724.6
100 1_ $aLubera Kawsy, Deborah.
245 10 $aAlexander Girard, architect. Creating midcentury modern masterpieces.$cDeborah Lubera Kawsy.
260 __ $aDetroit :$bWayne State University Press$c2018.
300 __ $a304 p.
520 8_ $aDuring the midcentury period, Michigan attracted visionary architects, designers, and theorists, including Alexander Girard. While much has been written about Girard's vibrant
colored and patterned textiles for Herman Miller, the story of his Detroit period (1937?53)?encompassing interior and industrial design, exhibition curation, and residential
architecture?has not been told. 'Alexander Girard, Architect: Creating Midcentury Modern Masterpieces' by Deborah Lubera Kawsy is the first comprehensive study of Girard's
exceptional architectural projects, specifically those concentrated in the ultra-traditional Detroit suburb of Grosse Pointe.
949 __ $hDES-STACKS$iS033256410$kONORDER$zYBPCAT
980 __ $a10008-1$b39.99$e39.99$f619489$g1
983 __ $a40028264771
985 __ $aDSFIR-APRV$eYANKEE
```

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Twitter: [Orangeaurochs](https://twitter.com/Orangeaurochs)
Email: tom@aurochs.org

At the screen you see an example of MARC BIB file with POL number stored in 980 field subfield \$a equal to "10008-1"



Delete MARC authority records via UI

PROBLEM

User needs to have the ability to delete a MARC authority record via UI. A MARC authority record can not be deleted if it is linked to another record

SOLUTION

Implementation for this feature used the common approach for working with entities via Data Import. User needs to have "MARC Authority: Delete MARC Authority Record" permission enabled.

WORK

	MODDICONV-228 Delete Authority: Create default job profile		CLOSED
	MODDICONV-234 BE: Suppress MARC Authority Delete profiles from Data Import Settings UI		CLOSED
	MODINV-635 Delete Authority: Create processor for Delete Authority record		CLOSED
	MODINV-703 After deleting MARC authority record the status request returns ERROR status		CLOSED
	MODQM-185 SPIKE: Ability to delete an authority record		CLOSED
	MODQM-195 Delete Authority: Implement DELETE record endpoint		CLOSED
	MODQM-227 User with permission "MARC Authority: Delete MARC authority record" can't delet...		CLOSED
	MODSOURCE-457 Delete Authority: Create processor for Delete MARC Authority record		CLOSED
	MODSOURCE-477 Configure job to delete authority records		CLOSED
	MODSOURMAN-691 Delete Authority: Support delete action and produce event		CLOSED
	MODSOURMAN-707 BE: Suppress Delete Authority job logs from Data Import log UI		CLOSED
	UIDATIMP-1091 Suppress MARC Authority Delete profiles from Data Import Settings UI		CLOSED
	UIDATIMP-1092 Suppress Delete Authority job logs from Data Import log UI		CLOSED
	UIDATIMP-1093 Suppress Delete action from the UI Action profile dropdown list - DRAFT		CLOSED
	UIMARCAUTH-64 Add DELETE action for individual MARC Authority records		CLOSED
	UIMARCAUTH-66 Test performance of MARC Authority delete action		CLOSED
	UIMARCAUTH-67 Permission: Delete MARC authority record		CLOSED
	UIMARCAUTH-94 Update 'records-editor.records' interface version		CLOSED
	UIMARCAUTH-137 Modify MARC authority processing for delete		CLOSED
	UIMARCAUTH-144 Deleted "MARC Authority" records display at result list		CLOSED
	UIQM-214 Update 'records-editor.records' interface version		CLOSED



UXPROD-3517 - Delete MARC authority records via UI

Users
MARC authority Users

User search

Keyword (name, email, identifier)
 dbohdan

Search

✕ Reset all

^ Status

Active

Inactive

^ Patron group

A1A1

AAA Patrons

ABC Patrons

Access Only, Do Not Loan Anything

aged-to-lost-testers

ak-test

alexv

Alum, Quarter 25

Alumni

Anna

auto-blocked

Bindery Charges

Borrow Direct Lending

User search results

1 record found

Actions

Name	Active	Barcode	Patron group
Bohdan, Denys	Active		Group for ten

End of list

Bohdan, Denys

Expand all

^ **User information**

Record last updated: 9/28/2022 5:29 AM

Last name	First name	Middle name	Preferred first name
Bohdan	Denys	-	-
Patron group	Status	Expiration date	Barcode
Group for tenant fs09000000	Active	-	-

^ **Extended information**

^ **Contact information**

^ **Custom fields**

^ **User permissions**

MARC Authority: Delete MARC authority record

MARC Authority: Edit MARC authority record

MARC Authority: View MARC authority record

Users: Can view permissions assigned to users

Users: Can view user profile



Browse instances by contributors

PROBLEM

Librarians want the ability to browse instance records via Inventory app by and mod-search must be updated to support.

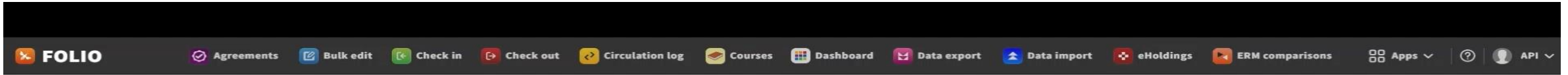
SOLUTION

Added the logic to search Inventory Instance records based on contributor name search query via mod-search. An additional Name Type facet was added to browse results with the only name type user wants to view.

WORK

MSEARCH-313 BE Implementation: Browse Contributors		CLOSED
MSEARCH-367 BE Implementation unit tests: Browse Contributors		CLOSED
MSEARCH-374 Contributors not indexed on reindex request		CLOSED
MSEARCH-383 Existed contributor is not displayed at Browse contributors result list when user ...		CLOSED
MSEARCH-388 The "Name type" filter doesn't account for the search query.		CLOSED
STCOM-1011 Browse contributors > Second pane should not show a horizontal scrollbar		CLOSED
STCOM-1018 Browse contributors. Placeholder match does not look right in the contributor colu...		CLOSED
UJIN-2023 Inventory > Update Instance search options dropdown with Browse contributors		CLOSED
UJIN-2057 Browse contributors > Second pane should not show a horizontal scrollbar		CLOSED
UJIN-2058 Browse Contributors: Hitting Next/Previous has odd behavior		CLOSED
UJIN-2059 Three pane view looks bad when coming from Browse contributors		CLOSED
UJIN-2079 Browse contributors. Placeholder match does not look right in the contributor column		CLOSED
UJIN-2106 The table columns size changes when user return to the "Browse inventory" pane		CLOSED
FAT-1698 Karate - Create a Contributor Name Type facet		CLOSED
MSEARCH-352 Create a Contributor Name Type facet		CLOSED
MSEARCH-365 Matching record count for subjects and contributors browse		CLOSED
MSEARCH-370 Tenant initialization error		CLOSED
MSEARCH-374 Browse contributors: duplicate contributor		CLOSED
STSMACOM-676 Filters list doesn't update when user back to "Browse contributors" pane		CLOSED
UJIN-2021 Inventory > Contributors Browse - Create a Name Type facet		CLOSED
UJIN-2024 Browse contributors list		CLOSED
UJIN-2062 Name Type facet sends requests to incorrect endpoint		CLOSED
UJIN-2068 Applied filters don't reset when user select "Browse contributors" search option		CLOSED
UJIN-2069 Filters list doesn't update when user back to "Browse contributors" pane		CLOSED
UJIN-2087 Non-exact match placeholder message displayed when user switching between bro...		CLOSED

UXPROD-3518 - Browse instances by contributors



Welcome, the Future Of Libraries Is OPEN!



Export MARC authority records

PROBLEM

Users want to have ability to export MARC authority records.

SOLUTION

Extended ability to export Authority records in .csv format directly from the MARC Authorities app and in .mrc file is available in the Data Export app. The user needs to have "MARC Authority: View MARC authority record" and "UI: Data export module is enabled" permissions enabled.

WORK

MBEXP-508 Spike: Export MARC authority records		CLOSED
MBEXP-513 Support quickExport for Authorities IDs		CLOSED
UIDEXP-275 Update Data Export > Are you sure you want to run this job? Confirmation modal to...		CLOSED
UIMARCAUTH-120 Allow user to select MARC authority record(s) to export		CLOSED
UIMARCAUTH-121 Export .csv file to load to Data export to create the .mrc file of selected auth...		CLOSED
UIMARCAUTH-130 Add a Select all/Un-select all on Results List		CLOSED
UIMARCAUTH-146 Export ".csv" file failed because of missing permission		CLOSED
UIMARCAUTH-153 SelectAll/UnSelectAll checkbox functionality is buggy when placeholder row ...		CLOSED



UXPROD-3673 - Export MARC authority records

The screenshot shows the Folio system interface. At the top, there's a navigation bar with 'Users' selected. Below it, a search sidebar on the left contains a 'User search' section with a 'Keyword (name, email, identifier)' field and a 'Search' button. A list of filters is visible, including 'Status' (Active, Inactive) and 'Patron group' with various alphanumeric codes. The main area displays 'User search results' for 'White, Walter'. A table shows user details:

Last name	First name	Middle name	Preferred first name
White	Walter	-	-

Patron group	Status	Expiration date	Barcode
Patron_group_231.1373 01461231488	Active	6/5/2022	-

Below the table are expandable sections: Patron blocks, Extended information, Contact information, Custom fields (0), Proxy/sponsor (0), Fees/fines (0), Loans (0), Requests (0), User permissions (2), and Service points (0). A 'Stop sharing' button is visible at the bottom of the interface.



Prokopovich Inventory



PROKOPOVICH MORNING GLORY DEMO

Morning Glory (test in [Bugfest MG](#) (login: folio / password: folio):

Search enhancements

- a. Exact match - quick display
- b. Search by Holdings and Item UUID
- c. Filter instance by Instance status
- d. Filter holdings by holdings type
- e. OCLC numbers normalized (now using mod-search)
- f. ISBN normalized (keyword, identifier all, and ISBN search option)
- g. ISBN and ISSN searches - incl.
 - i. Invalid ISBN or ISSN
 - ii. Linking ISSN
- h. Search subjects (incl. browse)



Bienenvolk

ERM

MORNING GLORY ERM FEATURES

- Enhancements to Agreement Supplementary Properties/License terms
 - New interface in settings with ability to search for a property/term ([UXPROD-3410](#), [UXPROD-3583](#), [UXPROD-3582](#))
 - Ability to deprecate properties/terms ([UXPROD-3407](#))
 - Date type for properties/terms ([UXPROD-2337](#))
 - Multi-select pick list type for properties/terms ([UXPROD-3406](#))
 - Categories for properties/terms for OpenAccess and other uses ([UXPROD-3427](#))
- Enhanced Package metadata in local KB ([UXPROD-3591](#))
 - Package identifiers
 - Alternative names
 - Status (e.g. current, retired)
 - Availability scope (e.g. global, consortial, regional)
 - Date/time the package data was created/updated in source knowledgebase
- Move identifiers between titles in the local KB ([UXPROD-3581](#))



Modules & versions



[R2-2022-GA - https://github.com/folio-org/platform-complete/releases/tag/R2-2022-GA](https://github.com/folio-org/platform-complete/releases/tag/R2-2022-GA)

- ui-developer-6.2.0
- ui-handler-stripes-registry-1.2.0
- ui-myprofile-7.1.0
- ui-plugin-find-erm-usage-data-provider-4.1.0
- ui-plugin-find-fund-1.1.0
- ui-plugin-find-package-title-4.1.0
- ui-plugin-find-user-6.3.0
- ui-servicepoints-6.1.0
- okapi-4.14.4
- mod-data-import-converter-storage-1.14.1
- mod-graphql-1.10.2
- mod-finance-storage-8.2.3
- mod-orders-storage-13.3.3
- mod-configuration-5.8.0
- mod-codex-ekb-1.10.0
- mod-inventory-storage-24.1.0
- mod-inventory-update-2.2.0
- mod-codex-inventory-2.3.0
- mod-users-18.3.1
- mod-data-export-worker-1.4.10
- mod-login-7.7.0
- mod-permissions-6.1.0
- mod-pubsub-2.6.1
- mod-circulation-storage-14.1.0
- mod-rtac-3.3.0
- edge-rtac-2.5.2
- mod-user-import-3.6.6
- mod-source-record-storage-5.4.2
- mod-oai-pmh-3.9.1
- ui-oai-pmh-3.2.2
- edge-oai-pmh-2.5.1
- mod-z3950-2.4.0
- mod-inventory-18.2.2
- mod-organizations-storage-4.3.0
- ui-plugin-find-contact-3.2.0
- ui-plugin-find-interface-3.2.0
- mod-finance-4.5.2
- mod-calendar-1.15.0
- ui-calendar-7.2.0
- mod-event-config-2.3.0
- mod-template-engine-1.17.0
- mod-audit-2.5.0
- ui-circulation-log-2.2.1
- mod-email-1.14.0
- mod-sender-1.8.0
- mod-notify-2.11.0
- mod-feesfines-18.0.2
- mod-patron-blocks-1.6.0
- mod-notes-3.1.2
- ui-notes-6.2.0
- mod-circulation-23.1.5
- ui-checkin-7.1.1
- ui-checkout-8.1.0
- ui-circulation-7.1.0
- ui-plugin-create-inventory-records-3.1.0
- ui-requests-7.1.3
- edge-sip2-2.2.0
- mod-ncip-1.11.1
- edge-ncip-1.8.0
- mod-patron-5.3.0
- edge-patron-4.9.3
- mod-tags-1.2.0
- ui-tags-6.2.0
- mod-orders-12.4.3
- ui-acquisition-units-3.2.0
- mod-gobi-2.4.3
- mod-agreements-5.2.2
- ui-erm-comparisons-4.2.1
- ui-local-kb-admin-5.2.0
- ui-plugin-find-agreement-8.2.0
- ui-plugin-find-eresource-4.2.0
- mod-licenses-4.2.1
- ui-agreements-8.2.2
- ui-licenses-8.2.2
- ui-plugin-find-license-8.2.0
- mod-courses-1.4.5
- ui-courses-5.2.0
- mod-service-interaction-1.1.0
- ui-dashboard-2.2.0
- mod-source-record-manager-3.4.5
- mod-copycat-1.3.0
- edge-connexion-1.0.5
- mod-data-import-2.5.0
- ui-data-import-5.2.4
- ui-plugin-find-import-profile-5.2.0
- mod-kb-ebSCO-java-3.11.1
- ui-eHoldings-7.2.3
- mod-erm-usage-4.4.0
- ui-erm-usage-6.2.0
- mod-erm-usage-harvester-4.1.0
- mod-invoice-storage-5.4.0
- mod-eusage-reports-1.2.1
- ui-plugin-eusage-reports-2.2.3
- mod-invoice-5.4.1
- ui-finance-3.2.1
- mod-search-1.7.5
- ui-plugin-find-instance-6.2.0
- mod-data-export-4.5.1
- ui-data-export-5.2.3
- ui-inventory-9.1.13
- mod-organizations-1.5.0
- ui-invoice-3.2.3
- ui-orders-3.2.2
- ui-plugin-find-organization-3.2.0
- ui-plugin-find-po-line-3.2.0
- ui-receiving-2.2.0
- mod-ebSCO-net-1.3.3
- edge-orders-2.6.3
- mod-ldp-1.0.6
- ui-ldp-1.8.0
- mod-quick-marc-2.4.2
- ui-marc-authorities-1.1.2
- ui-quick-marc-5.1.2
- mod-authToken-2.11.0
- mod-data-export-spring-1.4.5
- ui-bulk-edit-2.0.3
- ui-export-manager-2.2.3
- ui-organizations-3.2.2
- ui-plugin-bursar-export-2.2.1
- mod-remote-storage-1.6.0
- ui-remote-storage-3.2.2
- edge-caiasoft-1.3.1
- edge-dematic-1.6.1
- mod-codex-mux-2.12.0
- ui-search-5.1.0
- mod-password-validator-2.4.0
- stripes-smart-components-7.2.3
- mod-users-bl-7.3.0
- stripes-core-8.2.2
- ui-users-8.1.3
- mod-login-saml-2.4.9
- ui-tenant-settings-7.2.0



Key Nolana Proposed Features



BULK-EDIT

- Users - in app approach
- FOLIO holdings locations
- Item loan types

EXPORT

- OAI-PMH stabilization
- Export Manager app stabilization

ERM (INCLUDES EHOLDINGS)

- Dashboard: Managed/shared dashboards
- Agreements: Search/Filter agreement lines and UX improvements
- Agreements Local KB: GOKb Package metadata enhancements

ACQUISITIONS

- Stabilization
- Preview fiscal year rollover
- GOBI integration interface to edit mapping files
- Generate new orders from instance records
- Generate new invoices from order records
- Download or Re-send EDIFACT order export files from the Export manager

CIRCULATION

- Stabilization
- Calendar app refactor (Team Bama)
- User/Check out - Pop-up notes UX improvements

CATALOGING

- quickMARC UX improvements
- Authority source file facet
- Elastic search - small enhancements (including search administrative notes via Query search)

DATA IMPORT

- Data import log enhancements
- Stabilization

CODEX

- Deactivate all FE/BE modules



Useful Links



[Team vs module responsibility matrix](#)

[Morning Glory \(R2 2022\) Release Notes](#)

[Morning Glory \(R2 2022\) dashboard - https://issues.folio.org/secure/Dashboard.jspx?selectPageId=12204](https://issues.folio.org/secure/Dashboard.jspx?selectPageId=12204)

[R2-2022-GA - https://github.com/folio-org/platform-complete/releases/tag/R2-2022-GA](https://github.com/folio-org/platform-complete/releases/tag/R2-2022-GA)

<https://morning-glory.docs.folio.org/>

[Nolana \(R3 2022\) Release plan](#)

[Orchid \(R1 2023\) Release Plan](#)



Many Thanks