

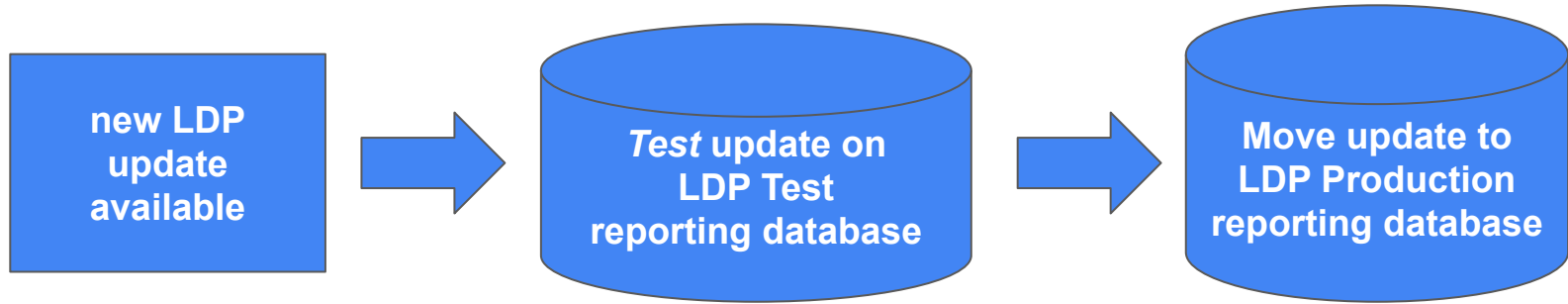
FOLIO Reporting Update

October 17, 2022

LDP Software Updates (Sharon)

- Lessons Learned from recent LDP outages
- New workflow for upgrades to the LDP Production reporting database
- New LDP Test reporting database deployed
- Strategy = test on LDP Test, then implement on LDP Production
- Requires more testing by the Reporting Team
- Set of new [data integrity testing queries](#) in development to test data in LDP reporting database
- CUL's focus on data integrity testing shared with larger FOLIO Project via Reporting SIG and other institutions running LDP for reporting with FOLIO

LDP Update Workflow: Focus on Testing



- See more details on LDP Software Update Schedule
- <https://confluence.cornell.edu/display/foioreporting/LDP+Software+Update+Schedule>

Administrative Notes (Jean)

- Transaction note information has moved from holdings to Administrative note in instance record
- In Voyager, this information was encoded in local MARC field 948

Where did the metadata go?

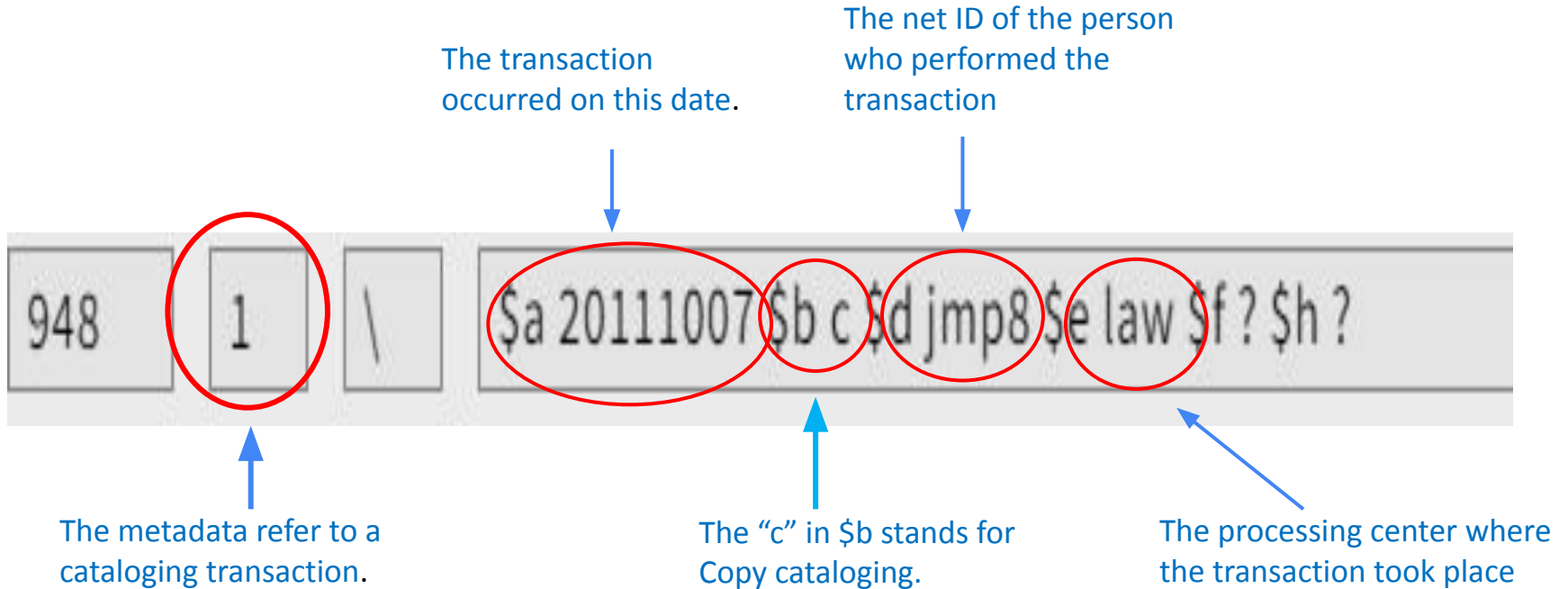


In Voyager, certain kinds of local metadata were encoded in 948 fields within MARC records.*



*Caveat: not all records in Voyager had 948 fields. This practice was not instituted until after Cornell had been using Voyager for some period of time. Also, records that migrated from NOTIS to Voyager did not have 948 fields.

Each subfield and indicator has meaning.



MARC records that migrated from Voyager still have these 948 fields in them. You can extract the metadata, nicely parsed out into individual subfields, using the `srs_marctab` table in the LDP.

<code>instance_hrid</code>	<code>ind1</code>	<code>sf</code>	<code>content</code>	<code>field</code>
7199833	1	a	20111007	948
7199833	1	b	c	948
7199833	1	d	jmp8	948
7199833	1	e	law	948
7199833	1	f	?	948
7199833	1	h	?	948

When we migrated to FOLIO, we started entering most of this information into a *transaction* note located in the **Inventory holdings** record.

^ Holdings notes

Note type*

Transaction data




Note*

date:20220810 ttype:i userid:jmp8 ploc:law

Staff only



These notes can be found in the holdings_notes derived table in the LDP.



ABC holdings_hrid 	ABC note 	ABC note_type_name 
15440450	date:20220810 ttype:i userid:jmp8 ploc:law	Transaction data

When we implemented the current version of FOLIO on August 15, 2022, we started entering this information in an *administrative* note located in the **Inventory instance** record.

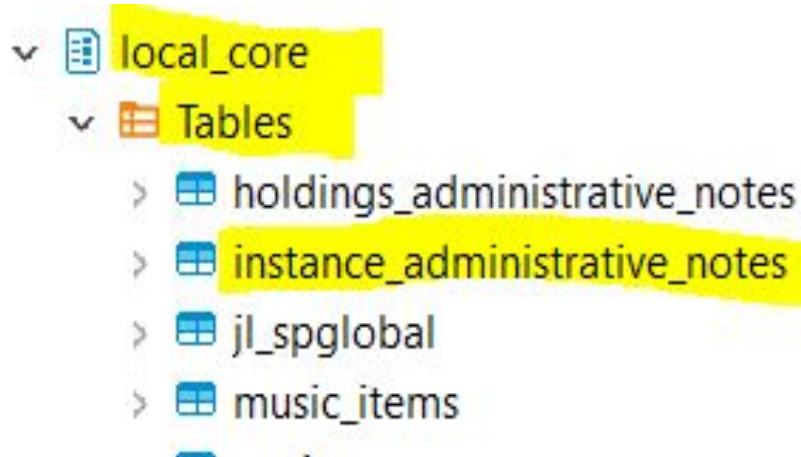
Administrative note

```
date:20221011 ttype:c userid:jmp8 ploc:law
```

Natalya created a special local table to allow us to retrieve this information in the LDP.

ABC instance_hrid 	ABC administrative_note 
15532437	date:20221011 ttype:c userid:jmp8 ploc:law

Within ldp_cornell, this local table, called ***instance_administrative_notes***, can be found under local_core > Tables.




- Eventually, the metadata we entered into the transaction notes on the holdings records in FOLIO will be migrated to the administrative notes on the instance records. For right now, however, the information can be found in one of in 3 different places, depending on how old the record is.
- Voyager-era records that migrated to FOLIO – 948 field
- Records created in FOLIO from July 1, 2021 to August 14, 2022 – Transaction note on the holdings record
- Records created in FOLIO beginning August 15, 2022 – Administrative note on the instance record

Patron Notes (Joanne)

- Change in the Notes table
- Available in update to LDP software version 1.8
- See this table in the LDP

FOLIO Fiscal Year Issues (Nancy)

- Changes required for queries and dashboards after Fiscal Year rollover



Fund: Each fund has a specific budget every year
Budget: Budget for a specific fund can only be distinguished by adding a join with fiscal year

Fiscal Year FY2022

- Only FY2022 in Database
- Each Fund has only one budget

Fiscal Year FY2023

- We have Two Fiscal years, FY2022 and FY2023
- Needed to link Fund with Budget and Fiscal Year in order to have to correct budget associated with each fund per year

EXAMPLE

FY2022

```
SELECT *  
FROM finance_funds AS ff  
  
LEFT JOIN finance_budgets AS fb ON fb.fund_id = ff.id
```

Joining Fund with Budget was sufficient, since there was only 1 fiscal year ID in the database

FY2023

```
SELECT *  
FROM finance_funds AS ff  
  
LEFT JOIN finance_budgets AS fb ON fb.fund_id = ff.id  
LEFT JOIN finance_fiscal_years AS ffy ON ffy.id = fb.fiscal_year_id
```





Steps taken

- Canned reports were updated
- Automated reports were updated
- Tableau dashboards were created for both fiscal years

In progress

- Tableau dashboards to be updated to be able to filter by fiscal year
- Review all finance reports to make sure they're updated with the new SQL code

UUID (Vandana)

- In the srs.marctab table, all ids used to be in the format of a **character string**. Now they have all been cast in the format of a **UUID** (Universally Unique Identifier)
- **Why?**
 - UUIDs are 36 character alphanumeric strings - when generated they are unlikely to ever repeat (unless the number is close to infinity)
 - This is good for large tables that will keep expanding

UUID

What does this mean for queries?

- As no other LDP table except for srs.marctab has IDs cast as UUIDs, we will get an error message when we try to link marctab to other tables via shared IDs
- We cannot link fields that have different formats
- Solution: in the query, cast the OTHER TABLE's id as a UUID too

UUID code example: linking marctab to holdings_ext

SELECT

substring(sm.content, 7, 2)::text **AS** "format_type",

he.holdings_id,

he.permanent_location_name **AS** perm_location

FROM srs_marctab **AS** sm

LEFT JOIN folio_reporting.holdings_ext **AS** he

ON sm.instance_id = **he.instance_id ::uuid**



Reporting Users

- What topics would you like us to cover in the FOLIO Reporting Users Group meetings in the future?
- Metadb
- Voyager Finance Tables issue - transaction amount decimals stripped out when data was migrated