

**Summit 3 COE Working Group Meeting
September 15, 2015, 9:30 AM**

Participants (please bold your name as you come in):

Keith Folsom, **Jesse Thomas, Erin Bledsoe, Kate Cabe, Julie Carter, David Ketchum, Sue Shipman, Dawn Lowe-Wincentsen, Heidi Nance, Shanel Parette,**

2GTM - Summit WG Call

Summit COE Working Group

Tue, Sep 15, 2015 9:30 AM - 10:30 AM Pacific Standard Time

Please join my meeting from your computer, tablet or smartphone.

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Agenda:

1. Next COE call with Ex Libris will be on **Wednesday, Sept. 23 at 8:30 am**
 - a. Is this 8:30 starting time convenient for everyone else?
2. Syncing Problems
 - a. Ready to Be Sent
 1. UI is seeing more borrowing requests getting stuck in our Ready to Be Sent queue. Is anyone else seeing this? It sounds like a timeout error is to blame. We are pressing Ex Libris for an October resolution.
 - b. Cancelled Requests going back into Request Sent to Partner
 - c. Locate in Process
 1. Is anyone still having problems with borrowing requests getting stuck in Locate in Process? (cf. High Priority, line 6)
 - d. Locate Failed / Locate by Profiles
 1. Still a problem?
 2. Has your lending Locate by Profiles been updated?
 3. ACTION: Have Keith review these next week
3. Re-prioritization of cases
 - a. Terminology
 1. Currently : High Priority / Medium Priority / Low Priority / Out of Scope
 2. Development Time Required vs. Impact on Patron/Staff - make this distinction clear to Ex Libris on next call
 - b. COE Punch List - review and revise as needed
4. Comment field in the Primo request form
 - a. GFU: "We are still in the midst of deciding what to do about our distance patrons requesting items to be delivered to their homes. Right now, we have an entire group of users using the comment field to request home delivery, and that is their only way to communicate that request to us and have it be directly tied to the specific item request. I would be strongly against removing the comment field for that reason."
 - b. SOU: "SOU uses the comment field and we'd like to keep it."

- c. WU: "Willamette likes the comment field."
 - d. OSU: "We've hidden it at Oregon State."
 - e. UI: "If you combined both the comment/volume field, that would serve my needs."
 - f. The decision to show/hide the comment field should probably remain a local decision, although we'll want to continue pressing Ex Libris about how the comment field factors into the request process
5. New status queue for damaged/AAR items
- a. Damaged items that qualify for AAR replacement often remain in the Returned by Partner queue for a long time. This is confusing and creates extra work for staff members when they are reviewing their queues.
 - b. Borrowing Requests – Report Damaged Item to Partner & Report Lost Item to Partner (do these statuses even work?)
 - c. Lending Requests – should we ask Ex Libris to create a new status for damaged loaned items? Would this just be a place holder until the next AAR cycle, or do we expect it to send some sort of message to the borrowing library?
 - d. ACTION: Heidi/Shanel will submit a case explaining the need and preferred workflow
6. Diacritical Marks
- a. we closed our Alliance-wide case because we thought this had been resolved, but we're still having trouble searching some of these titles
 - b. results vary by title and institution
 - c. ACTION: check to see if you have any diacritical requests in your local environment (or submit a test request for one of these titles and then try searching for it)

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7. Undo button (cf. Medium Priority, line 6)
- a. Messages can't be recalled once they've been sent, so in all likelihood this will take the form of an Alma block/alert instead
 - b. We need to provide Ex Libris with a detailed workflow about when this alert should appear
 1. Lending – accidentally double-scanning an item completes the request
 2. Lending - returned items shipped again [JULIE WILL TEST]

3. Lending - accidentally shipping short/long - override previous message?
4. Borrowing – accidentally returning an item before the patron has a chance to use it deletes the item record
5. Borrowing – we currently have the ability to check a Summit book out to a patron without receiving it first. This causes secondary messaging problems and needs to be blocked.
6. Borrowing – it would be nice if we could prevent dup requests from being created. Perhaps Alma could check to see if there's already another lending request with the same ExtID and alert the borrower before they resend the request.
7. It seems like there are two potential options here: pop-up alerts whenever the request deviates from the normal workflow, and sending follow-up messages in cases where the first message was incorrect.
8. ACTION: Add examples to punch list and discuss on next week's call

8. Visiting Summit Patrons

- a. This topic generated a lot of discussion on our last delivery open call. Participants expressed interest in a separate call just about this.
- b. How are your libraries managing these patrons?
 1. Library Policy
 2. Authentication
 3. Patron account configuration in Alma
 4. ACTION: Shanel/Kate will demo on open call next week; send out special email announcement (Circ/Systems/authentication folks) to ensure the correct people are on the call.

9. Summit lending policies across the Alliance

- a. The D&D Team is considering creating a list of Summit-allowable locations for all the member libraries.
- b. Which item types are we most concerned about? What is the best way to solicit this information?
 1. Circulating Materials (from old Alliance website)
 2. ITypes (from old Alliance website)dsf
- c.

10. Additions from SWG Team Members?