

## Summit Working Group Call

Wednesday, October 28, 2015, 8:30 – 9:30

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

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

### Credentials:

**GTM – Summit Working Group**

Wed, Oct 28, 2015 8:30 AM - 9:30 PM Pacific

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

<https://global.gotomeeting.com/join/298747501>

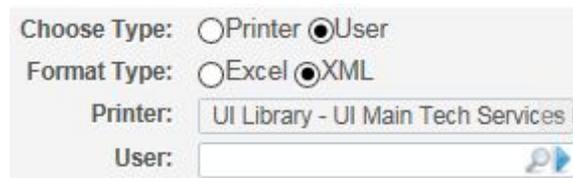
You can also dial in using your phone.

United States 1-872-240-3212

Access Code: 298-747-501

### Agenda:

1. November Release - Alma updates
  - Syncing Problems (see explanation below)
    - o Clicking Send again does not create a dup request
    - o It's hard to test the actual syncing fix in the sandbox
  - Place in Queue info added to Primo - affects both local & resource sharing holds
    - o Fulfillment (p.58) - 'After submitting a request from the Primo Get it tab, the request's place in the queue now appears. A new label, **c.uresolver.request.placeInQueue**, was added to the discovery interface labels for customizing the message'
  - New search options for borrowing/lending requests
    - o New 'ALL' facet added to Active/Completed toggle
    - o Additional search options: Author, DOI, Journal Title, LCCN, OCLC #, PMID
  - Sticky radio buttons for paging slip printing



The screenshot shows a web form with the following fields and options:

- Choose Type:** Radio buttons for  Printer and  User
- Format Type:** Radio buttons for  Excel and  XML
- Printer:** A dropdown menu with the selected value "UI Library - UI Main Tech Services"
- User:** An empty text input field with a search icon on the right.

- Phantom notes/general messages removed from Task List
- Improved response time when opening borrowing/lending request queues
  - o Moshe has confirmed that slowness is related to the quantity of requests. He says they've found some inefficiencies with how the system builds up the list, and have managed to improve it. These inefficiencies are mostly on the

borrower side, so that's what they're focusing on. They have another improvement scheduled for December, also on the borrowing side.

- Cancellation Notices – **Notify Patron box**
  - Previously if you cancelled a Summit request and unchecked the “Notify Patron” box, it still sent the cancellation notice to the patron.
- 2. Visiting Summit Patrons - review policy wording (see below)
- 3. AAR instructions
  - Has everyone finished cleaning up their AAR stuff from this past summer?
  - Do the online instructions need to be revised?
- 4. Expired Summit Requests
  - Do we want to turn this back on yet?
  - It's mainly configured at the NZ level - 3 or **4 days**, depending on local workflows
  - Daily expiry job runs at the *lending* library. That's why we've left it off until now, because lending requests were not being created reliably due to syncing errors (plus the job only targets specific statuses, so problem requests still might not get flagged for expiry)
- 5. Scan In problems
  - Would someone be willing to document the problems we're seeing?
  - Lending → scan in at circ desk automatically ships/defaults to long long (A/V issue)
  - Borrowing → doesn't update borrowing request to Received or send receive message to lender; you can also check out the item to the patron directly, without even scanning it in
- 6. Summit Circulating Locations
- 7. Analytics
  - discuss COE examples, what other reports would people like to see?
  - Evaluate borrowing/lending reports for accuracy
  - Next ROTA adjustment? Keith would like to wait until the next PM takes over
- 8. Next COE call - Wednesday, November 4, 8:30 - 9:30
- 9. Other Topics for Discussion?

### **Syncing update from Moshe Schecter (10/21)**

Timeouts are sometimes causing a message that has been successfully transmitted to appear as *not* having been transmitted. This is happening randomly and appears to be related to network issues. In the

November release:

- a) The system will try to correct this automatically for messages *other than the initial request*

*message.*

- b) For the initial request, the borrowing request will remain as 'Ready to Be Sent' and require a manual resend. The resend can be safely done without risk of creating a duplicate request on the lender side. The libraries workflow should be to facet for ready to be sent requests and simply resend them without any additional work required.

With regard to cancellation messages, we added a fix last July but following your reports have identified a problem with it which will be fixed in December. The problem is related to the response message that is automatically fired by the lender being improperly managed by the borrower because of it being received before the system on the borrower side fully completed managing the initial cancellation request.

### **Summit Visiting Patrons - Draft Policy**

Any **current** student, staff, or faculty member from an Alliance member institution (including emeritus in some cases) **is able to borrow materials at any other Alliance member institution.**

Patrons who want visiting privileges and/or the option of picking up materials at a different Alliance library must physically visit that library in person in order to be verified first. They will need to show their ID (university, college, or state issued) and be able to log in to their home library account.

Staff at the adopting library should verify that the patron has a valid account at their home library. Once they have confirmed that, they can then move forward with creating a visiting patron account for them in their own local database. We refer to this as "adopting" a Summit-eligible patron.

In order to verify the patron's current status, have them log in to their home library account using the institutional links below. There you should be able to see the patron's address, user group, and expiration date. The list of qualifying user groups is also available below.

**NOTE: Calling the home library might be necessary if there is a problem with the account. When calling to verify a patron's identity, be aware that some libraries will only share patron information with the patron (after the verifying the patron's identity) while other libraries will not share any patron information over the phone whatsoever.**