Summit COE Working Group Call

Tuesday, January 19, 2016, 9:30-10:30 PST

Attendees (please bold your name as you come in):
Jesse Thomas, **Kate Cabe**, **Erin Bledsoe**, **Heidi Nance, Julie Carter**, **Dawn LoweWincentsen**, **Sue Shipman**, **David Ketchum, Shanel Parette,**

Credentials:

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Agenda:

1. COE updates from Ex Libris

   a. Redundant cancellation message in audit trail - **March**

   b. Confusing partner information (PSU) in borrower's audit trail - **March**

   c. Quotation mark error in borrowing request titles - **February**

   d. Scan In workflow errors/syncing problem - **[Chen] "We have a plan to introduce a new customer parameter that will be used to prevent shipping and receiving from the Scan In interface. When an item is scanned in and is calculated to require shipping or receiving, an error message will pop up. That is the current plan for handling such
   errors and is currently scheduled for Q2 2016."**

   e. Ready to Be Sent error - **March**
   f. Journal titles not populating FulCancelLetter - **March**
   g. Dup checking - ISBN (**Feb**), Comments (**March**), OCLC Number (**March?**)

2. Proposed **Annual Summer Meeting Sessions**
   a. Summit Processing and Troubleshooting
   b. Summit 101 - General Training & Best Practices!
   c. Courier RFP Update
   d. Courier 101
   e. NCIP Integration with ILLiad and Alma
   f. AAR
   g. Hot Topic Meeting with facilitated discussion
   h. Big Picture Thinking Session - Next Steps for Summit?
   i. **ACTION: Forward suggestions above to Jane Scott and have her add to the Alliance survey (Jesse) - DONE**

3. SPOT tasks that are currently being overlooked by D&D

a. **Rota Review**
    i. This hasn't been done in over a year.
    ii. We need to decide what time period we're going to focus on (6 months, 1 year, etc.) and then identify what analytics data we're going to use to make these decisions.
    iii. I'm hearing reports of people manually changing their request statuses for housekeeping purposes. That means the request status reports might not be generating accurate consortial data. We may need to rely on shipping/receiving dates instead.
    iv. We'll also need to review Anya's documentation from previous revisions to make sure we're being consistent.
    v. Who would like to work on this?

b. **Training Videos**
    i. "Create and maintain online training manual and short procedural videos" is part of the D&D charge.
    ii. The SWG is more knowledgeable about Summit than anyone else, which means we're probably the most capable of creating useful training videos.
    iii. I'm not sure where these videos will be hosted yet, but perhaps we could start by generating a list of topics.
        1. Borrowing
            ● Queue maintenance
            ● Creating a manual request in Alma
            ● Cancelling a request
            ● Sending notes and general messages
            ● Patron account maintenance
            ● Receiving items
            ● Returning items
            ● Troubleshooting (no barcode, not shipped, etc.)
            ● Interpreting audit trails
            ● Reviewing the Tasks List
            ● Others?
        2. Lending
            ● Queue maintenance
            ● Shipping items
            ● Resolving locate faileds
            ● Checking In items
            ● Troubleshooting (Created lending requests, paging slip problems, etc.)
            ● Others?

c. Review AAR documentation (under the Alma Procedures tab)
    i. Ex Libris will be adding the Physical Items folder to the Lending Requests SA in analytics in February.
    ii. Physical Items includes **Fulfillment Notes** and **Permanent Call Number**, so we should be able to generate all our AAR information in this one subject area for the next AAR cycle.

   iii. Would someone be willing to review this documentation to see if it needs to be updated?

 d. **Contacting D&D Reps** (or Summit processors) to get feedback about comfort levels, questions, and frustrations

   i. This is something that SPOT used to do.

   ii. It allows us to check in with each institution and get feedback from people who might otherwise feel uncomfortable talking on open calls or posting to the listservs.

   iii. Does the SWG want to take on this responsibility?

   iv. If so, we would need to develop a script of questions and divide up the list of libraries.

 e. **Expired Functionality**

   i. Do we want to turn this back on?

   ii. Should we do some additional testing first? I think WU, WWU, and UID are the only libraries that have this turned on.

   iii. If we impose this configuration change Alliance-wide, how many days should we give people?

 f. **SWG Call Schedule**

   i. We currently have biweekly calls scheduled with Chen & Moshe

   ii. I'm considering setting up a biweekly Alliance-only call for the SWG so that we can review the COE documentation and work through some of the other topics listed on this agenda.

 g. **Other Topics?**