

Summit COE Working Group Call

Wednesday, January 27, 2016, 9:00-10:00 PST

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

Jesse Thomas, Kate Cabe, Erin Bledsoe, Heidi Nance, Julie Carter, Dawn LoweWincentzen, Sue Shipman, David Ketchum, Shanel Parette

Credentials:

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Agenda:

1. Review minutes from last meeting
2. **Proposed Annual Summer Meeting Sessions**
 - a. Elizabeth sent out an Alliance-wide survey about this last Friday.
 - b. The deadline to submit feedback is February 10th.
 - c. If any of you would like to participate as presenters or facilitators for the Summit sessions, please indicate that on your form as well.
3. **Recent Summit problems caused by local configuration changes**
 - a. We saw a spike in the number of Locate Failed (lending) and Ready to Be Sent (borrowing) requests last week.
 - b. In following up with Ex Libris, it sounds like local configuration changes may have contributed to these errors.
 - i. EOU - Locate Faileds (lending) – It sounds like a password change in their Z39.50 configuration may have disrupted their lending locate profile. Consequently, they ended up receiving over 100 locate faileds in a three-day span, mostly for items they don't own.
 - ii. WSU – Ready to Be Sent (borrowing) – This was triggered by a change to their local Send Borrowing Request Rules. This resulted in all their borrowing requests getting hung up in their Ready to Be Sent queue. There were 125 of these in a two-day period.
 - iii. Whitman – Locate Failed (borrowing) – Ex Libris thinks this was also related to the EOU problem. I'm still trying to get more details about the cause. We're not sure how a lending configuration change at one institution directly impacted another library's borrowing workflow. Correcting EOU's configuration seems to have fixed Whitman's problem, too, but we want to get extra clarification to ensure this doesn't happen again in the future.

- c. In the process of helping us resolve the EOU problem, Moshe also mentioned that Ex Libris is working on some sort of “automatic reject functionality” to be released in April. He was specifically talking about it as it relates to Locate Faileds, but it could have broader implications.
 - i. Moshe: “If that functionality would have been deployed already, EOU would have automatically rejected these requests without requiring a manual action.”
 - ii. I’m not sure how this will work. I’ve already asked Chen and Moshe for more information, but we’ll want to follow up on our next COE call as well.

4. **Documentation**

- a. Dawn & Shanel offered to work on this.
- b. Heidi: How does this mesh with our SWG team charge?
- c. Kate: This is a COE working group. COE work was supposed to be completed in October. Scope creep?
- d. Ray: Will try to provide extra leverage with ExL on COE work; work with John to figure out what’s coming next.

5. **Rota Review** (Julie & Erin)

- a. Some preliminary numbers
- b. Next steps/Timeline?
 - i. Reorganize rota template according to borrowing-to-lending ratios
 - ii. Prepare a new draft rota for D&D Team review
 - iii. Send draft rota to D&D reps (Summit contacts?) for review.
 - iv. Install new rota template at the NZ level.

6. **Contacting D&D Reps (or Summit contacts)**

- a. Sample questions from the last time this was done (back in March 2014)
- b. The focus back then was on Alma implementation
- c. What questions should we be asking now?

7. Continue reviewing our COE punchlist

- a. Are we happy with the current levels of prioritization?
- b. Do we want more detailed updates about any specific development efforts? (If so, we should probably tell Ex Libris about these in advance so they have adequate time to prepare.)

8. Other topics?