Summit COE Working Group Call

Wednesday, February 10, 2016, 9:00-10:00 PST

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

Jesse Thomas, Kate Cabe, **Erin Bledsoe, Shanel Parette**, Heidi Nance, **Julie Carter, Sue Shipman**, David Ketchum, Dawn LoweWincentsen, **Ray Henry**

Credentials:

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Agenda:

1. Review minutes from last meeting

2. **Summit COE Initiative "One Year Later"** (Jesse, Kate & Heidi)

   a. Heidi, Kate, and I recently drafted a report for Ray and John to provide them with a snapshot about where this COE initiative currently stands.
   b. Ray and John will be sharing this information with the Board later this week.
   c. Rather than focus on individual cases, we adopted a broader perspective in the hope of revitalizing our development partnership with Ex Libris.

3. **Updated Rota** (Julie & Erin)
   a. Review/discuss proposed modifications
   b. Next step: Send to D&D Team for final review and then send out to D&D reps/Summit Processors for Alliance-wide review.
   c. The review process will run through the end of February. Our target date of implementing this new rota is early March.
   d. Review by D&D Team; send to Summit list next week

4. **Summit Request Statuses**
   a. I have gone back and updated this workflow document.
   b. Let's review this internally before reposting it to the Alliance website (it is in dire need of updating!)
   c. Review by team; post on website next week

5. **Article Request Form**
   a. Heidi wrote up an excellent case explaining the Alliance's position regarding the article request form in Primo. (SF Case 201440)
   b. I'm including the full description below in case you'd like to read through it.

6. **COE Consortial Analytics update**
   a. We had another analytics call with Yoel on Tuesday. The main topic under discussion was anonymizing patron/user information at the NZ level (while leaving it intact at the institutional level).

b. Ex Libris has made some positive strides in the Borrowing/Lending/Fulfillment subject areas, but the lending shipping note that we use for our paging slips is still giving them trouble.

c. Yoel is going to reach out and discuss this directly with Moshe. He might also be joining us on one of our upcoming COE calls if they need additional information from us about this workflow.

7. **Contacting D&D Reps (or Summit processors)**

   a. Sample questions from the last time this was done (back in March 2014)

   b. The focus back then was on Alma implementation; what questions do we need to be asking now?

   c. ACTION: Create Google Doc of potential questions that everyone can contribute to.

8. **Other topics?**

Article Request Form (SF Case 201440)

Currently, Alma displays the Resource Sharing Article request form for some physical items such as bound journals and some PCI records. Is it possible configure Alma to never display the article request form for Resource Sharing returnable requests? The Orbis Cascade Alliance does not share articles using Alma Resource Sharing, and using the article form for non-article, returnable requests causes a number
of problems:

1. Missing title info. The title information from the requested resource imports to the Journal Title field in the Alma Resource Sharing request.

   a. Bad results:

      i. Staff cannot find these items by title. Staff must daily search – using analytics – to find requests in Borrowing and Lending that have null titles. They then must copy the title information into the article title field which allows them to be searchable by Title Searches.

      ii. In addition, if staff receive this item without correcting the title, the record in the patron's My Library account will have empty titles. This causes significant problems with overdue notices and billing.

      iii. Lastly, cancel notices for these items are missing the title information (fix scheduled in March for this particular problem).

2. Ship format. The default requested format is digital, even though the item is a physical item.

   a. Bad results:

      i. When a lending library receives an article request, it automatically defaults to a Digital shipping format. No move request gets placed on the item in Alma, so the barcode can't be used to ship it. Instead, the lender is forced to ship the item from the lending request using the External Identifier.

      ii. The lender must manually change the default shipping format from Digital to Physical to ensure the item is received in the correct format.

      iii. If the lender doesn't change the shipping format and leaves it as Digital, both requests—borrowing and lending—get updated to a new status of Shipped Digitally.

      iv.   The lender's availability information does not get updated properly. And the barcode never gets attached to the request, so the borrowing library is unable to receive and circulate the item to their patron.

      v.   If the borrower modifies the shipping format to Physical at the point of receipt, they are allowed to circulate the item, but once they return it they get the following error message: "Could not determine the next action for the item. Please contact the fulfillment administrator to check the configuration of the item."

      vi.   All of this manual manipulation could be avoided if we disabled the article request form and, by extension, the Digital shipping format.

3. PCI record problems.

   a.   There are numerous PCI records in Primo which display a Summit request option, including a wide variety of non-returnable items such as articles, reports, ebooks, and conference proceedings. When a patron initiates a Summit request on these types of items, Primo often displays the article request form.

   b.   The metadata information that gets passed into Alma doesn't coincide well with our locate profiles. As a result, many of these requests form bad rotas and end up in the lenders' Locate Failed queues.

   c.   This creates additional hardships for staff members at the lending library. They have to send a General Message to the borrowing library and ask them to cancel the Summit

request in favor of an interlibrary loan request.

   d.   Borrowing libraries tend to overlook these general messages. Eventually the lending library gets impatient and rejects the request. This action kicks the request to the next library in the rota and the cycle starts all over again.

   e.   [Kate] It's probably also worth noting that, based on the GES/display logic rule workaround we're using to hide the Summit link for these PCI records, there's a good chance we're also blocking resource sharing options for legitimate <u>returnable</u> PCI items. However, since we can't figure out a way to separate returnable and non-returnable items based on the source data, we've opted to disable the entire service instead. So

this has an impact on patron usability as well.

4. CSS Problems during upgrades. Many Alliance libraries have customized their Resource Sharing request forms using CSS. If ExL makes changes to this form in an upgrade, the CSS may break. (Case: 00137554).

   a.   Bad results: Staff at Alliance libraries must test both of Resource Sharing request forms – book and article - in the Primo/Alma sandbox prior to upgrades.

Example records:

   http://alliance-primo.hosted.exlibrisgroup.com/UW:all:CP71116234030001451
   http://alliance-primo.hosted.exlibrisgroup.com/UW:all:CP71163744510001451
   http://alliance-primo.hosted.exlibrisgroup.com/UW:all:CP71161562560001451
   http://alliance-primo.hosted.exlibrisgroup.com/UW:all:CP71180292830001451
   http://alliance-primo.hosted.exlibrisgroup.com/UW:all:CP7195315480001451

Even if the above technical problems can be resolved, using the article form for physical item requests is still a problem. If ExL makes changes to the article request form in the future, for other consortia, this will impact the Alliance returnable requests that use this form. It seems more effective to display the request form that best matches the correct fulfillment workflow for a given item, rather than the item genre.

In Resource Sharing, there are really only two major fulfillment workflows – returnable and non-returnable. Ideally, this is how Primo/Alma would think of Resource Sharing requests and their related request forms:

1. <u>Returnable</u> requests or "book" form. (Alliance shares these items using Alma.)
   a. All physical items.
   b. Books, bound journals, DVD's, CD's, VHS, etc.
   c. Workflow – items must be shipped, received, circulated, returned by the borrower, and re-shelved at their home library.
2. <u>Non- returnable</u> requests or "article" form. (Alliance does not share these items using Alma.)
   a. All scans or paper photocopies.
   b. Article citations, newspaper article citations, book chapter citations, etc.
   c. Workflow – items must be scanned/photocopied, shipped, and received. They do not need to be returned to the home library by the borrower.