

## Summit COE Working Group Call

Tuesday, February 23, 2016, 10:00 – 11:00 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:

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

<https://global.gotomeeting.com/join/575999069>

Or you can also dial in using your phone:

1-224-501-3312

### Agenda:

1. Review minutes from last meeting
2. Review **Moshe's** presentation from the last COE call [no set timelines associated with these]
  - a. **Create request from search** - all roles have access? Just RS roles?
  - b. **Prevent shipping & receiving from scan in** - likely a long-term solution. Concerns about the override function as proposed. When do we get a chance to have a conversation with ExL about these proposals? Openness to listening to concerns/suggestions/workflow issues. Will it be COE calls? Suggestion - we'll need to initiate conversation with ExL. Also need to know what ExL is willing to hear from us.
  - c. **Receive/ship multiple items** - seems like enhancement that's positive. And, hopeful that implementation will work as we expect (Especially, discussion of actions that won't happen until all items are received - what happens with incomplete set of items? Workflow in general?).
  - d. **Customizing Primo form** - not much info on moving to PBO-based management instead of CSS. Changes to Alma break the request form, which can be a significant user experience issue.
  - e. **Notify patron when moving to ILLiad requesting** - especially because ILL takes longer than Summit, typically. Kate: changing a local request to a resource sharing request also generates a cancellation notice for the local request, confusing the user (not configurable to avoid that notification at this point). Erin: our patrons don't get a cancellation notice or other notification (we have recently set up ILL as RS partner of last resort). This notification may not be desired functionality. Impact on Summit visiting patrons? Unknown, currently.
  - f. **Patron consent to share information** - this one is a bit complex. It may be that the only way patrons can direct request/pickup from other institutions would be through this information sharing that is approved by the patron. Seems like this is supporting visiting patron workflows that are currently (mostly) deactivated for us. Kate: don't want patrons to choose which library they get items from and want to make sure that's not a part of this.
  - g. **Controlling shared information** - allows institutions to control which parts of the patron record would be copied over. More information needed.

- h. Show other institutions' holdings in fulfillment network** - unsure what function is being proposed that isn't already enabled.

### 3. **Rota Update**

- a. I forwarded our rota proposal to the D&D Team for review last week. We will discuss it on our team call later this afternoon. Barring any setbacks, I think our next step will be to forward it to the D&D community for wider review before implementing any changes at the NZ level.
- b. Which lists should we post it to, and how long should we give people to respond?
  - i. DD-Reps
  - ii. fulfill-discussion list/Summit Circ contacts
- c. Lori (OSU) had suggested possibly holding off until the beginning of the next quarter (April) so that they could hire more student workers to account for their jump. That might be too long. Any thoughts about that?

### 4. **Summit Request Statuses** – updated version

- a. Has anyone had a chance to review this yet?
- b. Kate identified a problem with Expired requests. Alma isn't sending the patron a cancellation notice, and it's not deleting the temp item record either. We will be submitting a case about this shortly. How should we rewrite this section in the meantime?
- c. Shipped Digitally, Digitally Received by Library? Other curiosities? Is it better to add these just in case, or will that confuse people? Also, they might be hard to document, since we don't see them very often.
- d. Should we spend more time talking about Notes?

### 5. **Contacting Summit processors and/or D&D Reps**

- a. Basic script/sample questions - Draft
- b. Please review the draft document above and add any questions you think might be pertinent to this discussion.
- c. Who should we be calling? I've added the Summit circ contacts to the document. Is that our best source of information?

### 6. **Other topics?**

- a. If time allows - updates from Ray on: Board conversation and next steps; request for information/demos from Cal State system; any questions you have