

Summit COE Working Group Call

Wednesday, March 9th, 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**, **Ray Henry**

Credentials:

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

<https://global.gotomeeting.com/join/598421061>

Or you can also dial in using your phone:

Phone Number: 1-224-501-3312

Access Code: 598-421-061

Agenda:

1. Review minutes from last meeting
2. **March Release**
 - a. Auto-Locate failures
 - b. Recalls - I had AI run a consortial report about these earlier this morning. It looks like there were only 11 borrowing recalls that were placed before we had ExL turn it off.
 - i. borrowing
 - ii. lending
 - c. Redundant cancellation information – ExL updated my case (#190467) and said their fix didn't work after all, so back to the drawing board.
 - d. Takeaways? Suggestions about how we can avoid these disruptions in the future?
3. **Rota Update**
 - a. I forwarded our rota proposal to the fulfillment list, the D&D reps, and the Summit contacts after our last call. The review period runs through this Friday (3/11).
 - b. All the feedback has been positive so far. I've gotten some questions about how we generated the numbers, and how the ranking process works, but everyone seems okay with moving forward.
 - c. Several libraries suggested possibly holding off until the beginning of the next quarter (April), or semester (June), so that they could hire more student workers to account for their jump. Personally I'm still in favor of implementing these changes now, but perhaps this is something we should discuss. Comments or concerns?
 - i. Regular schedule? six month increments (July & January); fiscal year?
 - ii. Synchronize with other Alliance processes: AAR (May-July), bookbands (March), rota adjustments
 - iii. Damaged Items - broken DVD cases; do we need to revisit courier best practices so everyone knows what they're supposed to be doing? Can we add some new fields to the bookbands to indicate when the item was damaged (by patron, in transit, etc.)?
 - iv. Special Topic Open Call - courier best practices; contact Elizabeth first

- d. These changes will need to be made at the NZ level and then redeployed across the Alliance. Ray, can you help us with this or do we also need to get AI involved?

Jesse [ACTION] Send finalized rota order to Ray

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

- a. 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. She updated her original case (#137015) last week. How should we rewrite this section in the meantime?
- b. Shipped Digitally; Digitally Received by Library; Recalled Item; Recalled by Partner; Other curiosities? Is it better to add these statuses just in case, or will that confuse people? Also, they might be hard to document since we don't see them very often.
How to note lost/long overdue items? Which statuses actually send messages?
Can we get a list of all the status changes that actually trigger a message to the other library?
- c. Another consideration would be to add something about "Actions to Avoid"
 - i. Borrowing → Duplicate, Recall, Recalculate Rota Assignment (see Chen's email from today), etc.
 - ii. Lending → Duplicate (WHITC uses for ILLiad), Ship Non-Returnable, etc.
 - iii. Has anyone experimented with these actions? What happens if you click on them?

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. Here are two suggestions that David sent me last week for WG consideration:

First, **libraries really should be able to manually change the status to whatever we want in Alma RS request records.** I'll liken this to ILLiad, where while we can change the record status to whatever we want, manually changing the status does not move the record through a process, i.e., update the corresponding Rapid or OCLC record. In the end, though, these are really just record management systems, and individual libraries should be able to assign a specific status to any record based on local need/workflow without having to push the record through a workflow, part of which we are unable to do because we're either the lender or the borrower. The current design means requests are either stuck in a queue we're trying to clean out, we have to contact the partner library and ask them to do their part of the update to move the status along, we have to change the status to something that is not reflective of the request outcome, or we have to delete the record completely from our system. Again, none of this is ideal but could be solved if we had the ability to manually assign record statuses.

Second, it is very frustrating when Alma “assigns” Resource Sharing records to **individuals** because they manually change a record status, add a general note, or take some other manual action in the record. Just because someone affected a record does not mean it needs to be assigned to them. This is problematic because only Fulfillment Services Managers can see records assigned to others, and this isn’t a role most Summit processors, or even my Summit liaison, have. Making sure requests that are individually assigned are appropriately followed up on becomes problematic, then. Ideally requests would only be assigned to an individual if the assignment was intentionally and purposefully made; I don’t consider changing a record status, for example, a good reason to drop a record into an individual’s “private” queues. At UO, we know that after we make changes to records, we have to go back into the record to release the assign so others can have access to the records, and someone with the Fulfillment Services Manager role has to monitor the “assigned to others” tab/requests and release these individually so requests don’t get stuck/overlooked. I don’t consider this a workflow problem, I consider the system programmers to be presumptuous and not understand RS workflow; I can’t imagine many, if any, processors find this auto-assign to be helpful.

[Also see case #137361]--> submit to PSI list?