

Summit COE Working Group Call

Wednesday, March 23rd, 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 Lowe-Wincentsen, **Sue Shipman**, David Ketchum, **Shanel Parette**

Credentials:

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

<https://global.gotomeeting.com/join/728003317>

Or you can also dial in using your phone:

Phone Number: 1-646-749-3122

Access Code: 728-003-317

Agenda:

1. March updates

- a. Rota update – Al/Ray successfully implemented the new rota on 3/16. I haven't received any feedback yet, positive or negative, but it doesn't look like anyone's workflows were seriously disrupted.
- b. Sandbox update – Ex Libris completed the sandbox refresh on all seven premium Alliance sandboxes last week. We had a call with Chen the other day to see if we could successfully restore the resource sharing configurations. It didn't work initially, but Development figured out what was wrong and it should be working fine now. We will continue to monitor this during our April sandbox testing next week. Please let me/Ray know if you see any unusual behavior.
- c. Return Items fix → **June**
- d. Open/Closed locations – new 'Unavailable' option → **June [EVSC, UP, WWU, UW]**

2. April Release

- a. Automatic rejection of new lending requests that cannot be fulfilled ([see below](#))
 - i. This affects the locate process and could have serious consequences if applied incorrectly.
 - ii. Testing strategies?
 - iii. Follow-up questions for Ex Libris?
 1. Wait to see release notes first.
 - iv. Heidi: Will it check for other available copies, or just reject after the first one?
- b. ILLiad/Alma NCIP modification – April 10th refresh
- c. Quotation marks title problem – April 10th refresh

3. Hide Recall option for borrowing requests

- a. I submitted a case last week (#210437) asking Ex Libris to find a way to hide the Recall option in the borrowing requests queue.

- b. I'm hoping it will be a simple solution, similar to the fix they instituted to hide the Reject button on the borrowing side using workflow profiles.
4. **Contacting Summit processors and/or D&D Reps**
- a. Basic script/sample questions - Draft
 - b. One of the D&D assessment measurements under consideration reads as follows:
 - i. Alliance members will be highly satisfied with Summit 3 - At least 80% of respondents will be "satisfied" or "highly satisfied"
 - 1. Sue: Processors don't have a lot of input in the process; this might be their only opportunity to provide feedback; numbers might be lower as a result
 - 2. Heidi: What are we basing satisfaction on? Hard to get an accurate picture of satisfaction.
 - 3. Kate: How do we define satisfaction?
 - ii. Do we want to ask this question now in order to get some early feedback about user satisfaction?
 - c. Timeline?
 - i. April - Jesse will revise questionnaire and distribute to WG members in coming weeks.
5. **Summit documentation (Shanel/Dawn)**
- a. Review examples from spreadsheet
 - b. What should be the preferred format?
 - i. videos
 - ii. written instructions
 - iii. combination thereof
 - iv. Would an Alliance school be willing to donate a Canvas site? Summit lending 101? Etc.
 - c. Other topics for consideration?
6. **Other topics?**

Automatic rejection of new lending requests that cannot be fulfilled (Chen update, SF Case #163780)

If you end up getting a lending request and there is no record that can fulfill the request, the lending request will get a status of "Request Failed". This is not new, and the fact is that the borrowing side should check requestability before sending the request. But let's assume you eventually received the request. In April release you will see a new feature to "Automatic rejection of new lending requests when cannot be fulfilled". Libraries will be able to implement an automated workflow for rejecting lending requests that are known to be unfillable. This may be the result of a number of reasons, such as:

1. There is no matching library resource for the request
2. The library resource that matches the request cannot be shipped for resource sharing
3. **The library resource that matches the request is not available, i.e. is on loan etc.**

This feature should handle cases like that. In all of these cases, it will be possible to set an automated workflow that will not require staff intervention for rejecting the unfillable request. The automated workflow will save staff time and effort in rejecting requests that the system can automatically identify that cannot be fulfilled. I hope that it makes sense and that you will see improvement in April release.

Rota on sandbox as of 3/23/2016:

General Information
Template Members
Notes

Code Summit 3 Rota

Template Members
Partner Place At/Before First Add partners

		Move Up	Move Down	Name	Code
1	<input type="checkbox"/>		▼	WWU	WWU
2	<input type="checkbox"/>	▲	▼	WU_MOH	WU_MOH
3	<input type="checkbox"/>	▲	▼	WU_LAW	WU_LAW
4	<input type="checkbox"/>	▲	▼	PU_FG	PU_FG
5	<input type="checkbox"/>	▲	▼	PU_HPC	PU_HPC
6	<input type="checkbox"/>	▲	▼	UW	UW
7	<input type="checkbox"/>	▲	▼	PCC	PCC
8	<input type="checkbox"/>	▲		OHSU	OHSU