

Summit COE Working Group Call

Wednesday, April 20th, 2016, 9:00 – 10:00 PST

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

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

Credentials:

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

<https://global.gotomeeting.com/join/788004893>

Or you can also dial in using your phone:

Phone Number: 1-312-757-3121

Access Code: 788-004-893

Agenda:

1. Dup Lending Requests with same ExtID

- a. We've seen a wave of new SF cases being submitted about dup lending requests over the past couple weeks.
- b. Moshe: "It seems to be related to a rare condition, where the retried message was sent when the lender side was still processing the previous request. The resend mechanism is designed to cover scenarios where the message either failed altogether, succeeded but failed to report back to the borrower, or took some time to process. As per previous analysis, this is expected to be the normal failure scenario. This example seems to be of an exceptionally long time to process that happened on the lender side (you correctly noted 10 minutes before auto resend). That will cause the auto-resend to cause double requests. We don't understand what may cause this, but expect this to be very rare."
- c. These dup requests aren't very common. I ran an analytics report and only found 22 of them over the past six weeks. It's still problematic for the lender, though, so we are going to continue pressing Ex Libris to find a solution.
- d. The easiest short-term solution is probably to cancel these bad requests on the borrowing side and submit new ones. I will be following up with the impacted libraries over the next couple days.

2. Locate Faileds

- a. **WOU**
 - i. An API problem was creating bad borrowing requests with just the title information and nothing else. This generated a bunch of bad rotas and WOU received a number of books that didn't match what they were requesting.
 - ii. Camila fixed the API and it seems to be working better now, but I'm concerned that other libraries might be customizing their own APIs, for reasons as yet unknown. Still investigating this one with Ray.

b. **Reed & SU**

- i. I noticed these two libraries were receiving an unusually high number of Locate Failed lending requests, with them listed as the first library in the rota. I asked Moshe to investigate.
- ii. Moshe: "It looks to me like the issue is related to a known locate issue that is planned to be fixed in the May release. In a nutshell, the record ID in some cases is not properly sent from the borrower to the lender. The result is that the lender is relying on the metadata only (title/isbn/oclc number) for the locate instead of on record ID. The records in your list match to more than one potential record, resulting in locate fail. From what I'm being told it's an error in the code that is easy to fix and has already been fixed in the code. It will be deployable in the May release."

3. **Interview Questions for Summit Processors**

- a. Initial contact email
- b. Dividing up the list
- c. Conducting the interviews
- d. Documenting their responses
- e. Timeline?
- f. Assessment Piece
 - i. **Objective:** Alliance staff members who process Summit materials in Alma will be highly satisfied with Summit 3
 - ii. **Measures:** Annual survey item
 - iii. **Targets:** Set a baseline threshold for satisfaction level and look for Improvement

Qualitative and quantitative? Design baseline satisfaction survey, 1-5, overall satisfaction, how many complaints per day? Rate satisfaction, and then use in conjunction with interviews

4. Summit Documentation Update (Dawn & Shanel)

5. **Recalculate Rota Assignment**

- a. David submitted a SF case [#215743] about this on 4/14.
- b. Ex Libris initially suggested submitting an enhancement request.
- c. However, based on our previous experiences with hiding the Reject button, and another pending case for hiding the Recall option, I think we should try to push this through the COE initiative.
- d. Better overall configuration options for workflow profiles, or separate cases for each button? Greater overall granularity would work better for everybody.

6. **AAR**

- a. On the Alliance's Annual Account Reconciliation page, it says that Ray needs to send out an email soon to announce this upcoming AAR cycle.
- b. Ex Libris added some extra fields to the Lending Requests subject area in analytics so that we can all generate these reports easily and uniformly.
- c. In addition to the primary Lending Requests report, I also created one for Borrowing Requests. Here's where these reports can be found on the shared drive
 - i. /shared/Community/Reports/Orbis Cascade Alliance/Circulation & Resource Sharing/COE Testing/AAR – lending
 - ii. /shared/Community/Reports/Orbis Cascade Alliance/Circulation & Resource Sharing/COE Testing/AAR – borrowing
- d. Can you please run these for your local institution to see what they look like. Are the filters too narrow? Not narrow enough?

7. Alma Summit Statuses

- a. This statuses document has been completed revised.
- b. I ended up splitting it into two separate documents.
 - i. [Borrowing](#)
 - ii. [Lending](#)
- c. I've asked Ray to post this to the D&D website because the old version is horribly out of date and needs to be retired. However it's never too late to make corrections if you notice any mistakes. Please let me know.

8. Other topics?