

Summit COE Working Group Call

Wednesday, June 1st, 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

Agenda

1. **Courier discussion (Ray)**
2. **Update about our Summit COE document (Ray)**
 - a. Melissa Hilbert (ExL) has proposed the following:
 - i. Maintain the baseline functionality issues list in Support, using standard ExL workflows and surfacing issues in PSI. Support would then involve Moshe as needed.
 - ii. For moving the strategic issues forward, it would be a regular meeting with Moshe and someone from Support, probably scheduled no more frequently than monthly.
 - b. Questions for the Summit WG
 - i. Of our listed issues, what keeps them as part of the COE? Many of the cases listed on our original document have been moved to closed, or are now listed for the July release. Here's an example of an issue that looks "stuck" - SF 174956, SF 174961 (on a roadmap, supposedly, but no proposed date). Do we feel like there are still large initiatives that are not being resolved successfully, and **need** to be a part of the COE?
[\[174956/174961 → developing new damaged/lost queues \(both cases were last updated in Sept 2015\)\]](#)
 - ii. Some issues only have ExL internal case numbers - are we getting regular updates on those in the meetings with Chen and Moshe? This is something we would probably lose with a transition to interactions that are primarily Support-based.
 - c. Questions that still need to be posed to Ex Libris
 - i. What is the proposed timeframe for these changes?
 - ii. How will cases in Support get managed as part of the COE, or will they not be seen as COE-related?
 - iii. We are hesitant to relinquish the focused attention we're getting from Chen and Moshe because we feel like we're making progress - how do we keep that momentum going?
 - d. **Summit WG response**
 - i. Ray noted WG concerns and will share in the afternoon call with ExL
3. **Cancelling move request triggers auto-rejection of the lending request (Heidi)**
 - a. The fix that Ex Libris introduced in April is not working well for some libraries. Heidi has submitted two separate cases about this problem (the details of which are included at the bottom of the agenda).
 - i. SF Case #169127

1. Initial problem -> cancellation alert not getting sent to resource sharing library
- ii. SF Case #214238
 1. 'Skip Location' does not take requestability into account, so requests are getting placed on non-resource sharing allowable copies.
 2. UW often cancels move requests on multi-volume sets, then replaces the hold on a different volume so that the barcode information is accurate in the pick from shelf list.
- b. What is our preferred outcome?
 - i. Should the 'skip location' action be taking requestability into account?
 - ii. Are there other ways to get around the barcode problem without cancelling the move request? (Is this an Alma problem or an Alliance paging slip problem?)

4. Article Request Form [SF Case #201440] (Jesse)

- a. New mapping table
 - i. Having the ability to edit the resource sharing request form in Alma will address one of our major concerns, namely having a reliable form that doesn't rely on css to hide/display fields.
 - ii. However it doesn't address our other primary concern, the disruptions to our workflows caused by the request form itself.
- b. Ex Libris doesn't seem very inclined to disable the article request form.

If you use css to hide it it won't prevent it from being selected. It will just hide it.

The thing is that we select the article by default based on genre. In this case it is Journal hence the article form is selected automatically.

This is the current functionality and it can't be changed.

- c. How can we modify this workflow so that it supports our needs?
 - i. Bound volumes
 1. Some libraries lend bound volumes through Summit. What is the bare minimum citation information needed to process these requests (Journal Title/Volume/Issue/Year).
 2. Can this information be mapped into the book request form instead?
 - ii. Primo display
 1. The article request form is triggered by the genre info in the PNX record (article, journal, others?)
 2. We currently have the ability to hide the Summit option for articles, journals, and PCI records using a combination of GES/display logic rules.
 3. These are the default fields for the two request forms. The green fields are common to both forms, while the orange ones are specific to one or the other.

Article Request Form	Book Request Form
Citation Type (toggle)	Citation Type (toggle)
Article\Chapter Title	Title
Journal Title	Author
Author	Author Initials
Volume	Edition
Author Initials	ISBN
Issue	LCCN
ISSN	OCLC Number
LCCN	Other Standard ID
OCLC Number	Barcode
Other Standard ID	Remote Record ID
Barcode	Publisher
Remote Record ID	Publication Date
DOI	Place of Publication
PMID	Additional Person Name
Publisher	Source
Place of Publication	Series Title Number
Additional Person Name	Call Number
Source	Note
Series Title Number	Volume
Note	Part
Chapter	Chapter
Pages	Pages
Start Page	
End Page	
Publication Date	

d. ILLiad comparison

Substitute:genre	RequestType	article	Article:Article:ArticleRequest.html
Substitute:genre	RequestType	book	Loan:Book:LoanRequest.html
Substitute:genre	RequestType	bookitem	Article:Book Chapter:BookChapterRequest.html
Substitute:genre	RequestType	conference	Article:Conference:ConferencePaperRequest.html
Substitute:genre	RequestType	default	Loan:Book:LoanRequest.html
Substitute:genre	RequestType	journal	Loan:Book:LoanRequest.html
Substitute:genre	RequestType	preprint	Article:Article:ArticleRequest.html
Substitute:genre	RequestType	proceeding	Article:Conference:ConferencePaperRequest.html
Substitute:genre	RequestType	unknown	Article:Article:ArticleRequest.html
Substitute:genre	RequestType	document	Article:Article:ArticleRequest.html
Substitute:genre	RequestType	report	Article:Report:ReportRequest.html

e. Recent Ex Libris updates

- i. Callie (3/29) "...it looks like there is an enhancement on the product road map which would meet this need. There is a plan to allow customizing Primo request

forms. Since this project is an improvement we do not provide updates through cases. I have attached your case to this project to note your institution's interest in this new functionality. When this feature is released it will be noted in the relevant release notes.”

- ii. Chen (3/31) “I was looking on your examples again and I think we can offer some solutions here. Can we have a short call to re-discuss this case so we can better identify the gap in the functionality?”

5. June Release Testing Update

6. Other topics for discussion?

Details for Cancelling Move Request SF cases

SF Case #169127

...[T]here are some situations where staff at a branch library may choose to cancel the move request on the item, rather than send it to the Resource Sharing Library. (This happens when an item is damaged, not on shelf, or otherwise unavailable for loan.) When this happens, the Resource Sharing Library is not notified that the move request was cancelled. Staff in the Resource Sharing Library keep waiting for the item to arrive in transit, but it never does. This means that the request does not move on to the next library in the rota, and the patron is never notified that their request is unfilled. [...] Is it possible to have a solution wherein the Resource Sharing Library is notified when staff at a circulation desk cancels the request?

SF Case #214238

The Alma fix to auto-reject a resource sharing request when the move temporary request is canceled is causing two separate problems.

1. It is not checking for other available copies in our library before rejecting the request. Our library frequently has duplicate copies of books that could fulfill requests. Sometimes we are the only library in our consortia to hold a particular item. Auto-rejection of the request without checking for another available copy leads to scenarios where a patron at another library unnecessarily receives a cancel notice for a Resource Sharing request, when another copy of the item could have fulfilled this request. The proposed solution for fulfillment staff to select “skip” is not feasible for us. Skip will move requests to non-resource sharing locations such as our Special Collections location, which does not check their pick from shelf lists because their materials do not circulate through Alma.

2. It prevents us from filling some requests for multi-part items. We regularly (daily) need to cancel a move temporary request on volume A in order to create a new move temporary request for volume B for a single resource sharing request. This is because Alma frequently inserts the barcode for the incorrect volume or part, rather than the volume or part that the patron entered into the free-text field. While Fulfillment staff try to ignore the barcode for resource sharing requests only, and look only at the free-text volume or part field, they regularly forget or miss this because it’s different from the other local pick from shelf items on that list. Also, sometimes patrons put the volume/part information into the wrong field (Comments instead of Volume), so that information does not display at all on the pick from shelf list, so Fulfillment staff pick the item matching the barcode that Alma selected, not knowing if

it's the correct item or not. (At our library, staff at the Fulfillment Desks do not have roles to see resource sharing requests because they are not at resource sharing libraries.)

[Article Request Form document \(SF case #201440\)](#)

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. Correcting the title in the borrowing request itself fixes the search problem in the borrowing request queue, and allows the patron see the title in their My Account in Primo; but it doesn't update the title information in the item record. That's why you still see '-' for a title under the patron's request tab in Alma, and why the citation info in the notification email is still left blank. Apparently Alma uses the item record information for all the Circ processes (i.e. overdue notices, holds, and billing), but it relies on the borrowing request information for the Primo display.
 - iv. 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. 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 returnable 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.

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. **Returnable 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. **Non- returnable 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.**