WU - Fulfillment Spring Cleaning

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Learning outcomes

You will be able to go back to your library and remove the old Summit rules.

You will also be able to go back to your library and remove excess rules that ExLibris may have put in place.
Willamette situation

In the first cohort, helped with some early development, and we knew we had a number of fulfillment units in place and not being used.

We used a tool called “Confluence” for tracking work, it is basically a large wiki.

We waited till the summer, just in case we really through something off.
First step: inventory

Listed out all Fulfillment Units: broken down by Institution and then library level. Listed a general description, the locations, and the loan rules associated with it.

Created by Bill Keln, last modified on May 25, 2016

Institution Level

Regular
Regular locations that we allow checkout from.
cass, cd, coll, dispreg, doc, ebook, edoc, emedi, folod, folio, hint, hpop, hstor, newbk, rac, score, stack.
Loan rules:
4-hour, 3-day, 6-day loan, 6 week hpop, 6 month staff regular, 6 month high priority, 6 week regular, 30 day low priority.

Limited
These are locations that we typically do not allow checkout from, but sometimes do.
arch, arhat, arrec, arra, fiche, halco, hat, halli, halor, halov, hmap, hnewb, index, mfilm, muse, news, north, per, rdesk, ref, refat, restr, tech, vault, wllav, will, wucar
Loan Rules:
2-hour, 4-hour, 3-day, 24 hour staff limited, 24 hour staff priority, 24 hour regular priority, 24 hour low priority.
Second step: remove excess rules

ExLibris seemed to overpopulate the initial fulfillment unit with rules. No items in these locations would circulate for more than 24 hours.

Limited

These are locations that we typically do not allow checkout from, but sometimes do.

arch, arhat, arrec, arref, fiche, halco, hat, hallli, hatlor, hatov, hmap, hnewb, index, mfilm, muse, news, north, per, rdesk, ref, refat, restr, tech, vault, wilav, will, wucar

Loan Rules:

2-hour, 4-hour, 3-day, 24 hour staff limited, 24 hour staff priority, 24 hour regular priority, 24 hour low priority.
Third step: discuss and disable extra rules

We had multiple Summit rules:

Institution Level

**Summit L**
This is for all locations that are Summit.
summlend
Loan rules:
6 week loan, Summit Faculty No Fines, 6 day loan No Fines, 6-day summit

**Summit S**
hwcms
Loan rules:
Summit Short Loan
Third step: discuss and disable extra rules

We had multiple Summit rules:

**Library Level**

**Summit**

hll, HAT WCN Long, wcn (Going to disable all of these)

**Summit 3**

slong3, sshort3 - created 1/12/2015 (believe these are what are running Summit checkout right now)

Loan rules:

Summit Long Loan, Summit Short Loan
Disable rules for a week

Toggle off the rules you believe are not being used.

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<th>Rule Type</th>
<th>Name</th>
<th>Description</th>
<th>Output</th>
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<td>05/27/2016</td>
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</table>
Eventually come back and delete extra units

By tracking in wiki we could always re-create if needed

**Summit-L**
This is for all locations that are Summit.
summlend
Loan rules:
6 week loan, Summit Faculty No Fines, 6 day loan No Fines, 6-day summit

**Summit-S**
hwcn
Loan rules:
Summit Short Loan
Institution Level

Streamlined units
Library Level

Streamlined units

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<thead>
<tr>
<th>Code</th>
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<td>Equipment</td>
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Questions / Comments

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