2023-12-11 Resource Access Meeting Notes

Date
11 Dec 2023

Recordings
Find all recordings here: https://recordings.openlibraryfoundation.org/folio/resource-access-sig/ (pw: folio-lsp)

Zoom
https://zoom.us/j/337279319 (pw: folio-lsp)

Attendees
Thomas Trutt
David Bottorff
Elizabeth Chenette
Tara Barnett
Laurence Mini
Jana Freytag
Cornelia Awenius
Cheryl Malmborg
Leah Anderson
Rocco Labriola
Charlotte Whitt
Martina Tumulla
Mary E Yokubaitis
Susan Kimball

Discussion Items:

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| 5Min  | Administ rivia     | Cornelia Awenius  | • End of year feedback survey  
• look out fopr the next meetings  
• please use the agenda item dokument | Note taker: David Bottorff  
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| 35 Min| helper features    | all introduction  | WOLFCon 23 Topic:  
Talk about helper features  
Talk about the Checklist Feature that was thought up by the Open Access SIG. Do we have use cases for this in 'our' Apps?  
The other is the history tracking feature that was just added to invoices could be used in other areas. | App Interaction SIG: 2023-10-18 Meeting notes: Checklist support |
| 15 Min| fee/fines          | Susan Kimball     | question about fee/fine adjustment notices triggering for renewals          |                                                       |
Meeting Notes

- quiz on SIG to be released soon
- no meeting Thursday, last meeting of year Monday

Topics

- Helper features - are there use cases for RA?
  - Checklist feature in open access app (not a core app - still in the approval process)
    - Jana provided links to recorded session in app interaction SIG
    - Jana demo - not related to other features or connected to workflow.
    - each checklist item is created individually in settings, all records get all checklist items
    - will not be as easy to apply to other apps
    - Use cases?
      - Susan Kimball - could there be applications in course reserve? hard to understand in open access?
      - Tom Trutt - multiple steps in clearing licenses
      - David Bottorff - would not be adaptable enough for RA IMO, workflow engine would be more useful
      - Tom - idea that apps like this could be exported as libraries so it could be used in multiple places
      - Laurence Mini - don't see much use for checklist, info icons more useful (help icons that appear in various contexts)

- History tracking feature
  - Tom - something Dennis showed at EBSCO, new pane opens up with more detailed history
  - Susan saw it at wolfcon - definitely needed and would use, especially in user records, etc.
    - how do you scale it without getting overwhelmed by daily feeds, etc.
    - Tom believes that history of changes is kept in LDP/Metadb not directly in FOLIO
    - David - I'd want it to capture all actions in Users, including feed
    - Martina - orders app has a version history
    - David - what is the priority? How many institutions would need/want this who don't use LDP
      - Jana - anonymization or turn off due to GDPR
    - Inventory
    - Requests - record history as opposed to transaction history
    - Tom - could this be an addition to the circulation log?
    - David - where does the data live?
      - Tom - Metadb/LDP should be considered a core part of FOLIO
    - Tom - Settings history
    - Jana - GDPR issues (tracking productivity of individual through number of records updated, for example)
    - Charlotte - captured but only the latest change that you can see

- Susan Kimball - notice problem
  - trigger in fee/fine notices for item returned, fee/fine adjusted - this works
  - why isn't this happening when items are renewed? no trigger for the notice
  - we use circ log to process/report credits, and the notice of renewal doesn't go out
  - Does anyone else care?
  - Tom - Cornell split in half, one would love it, the other hates it
  - David - we don't use it now, but it seems like an obvious gap in the functionality
  - Cheryl - does manually adjusting the fine trigger a notice?
  - Suggestion to take this conversation to Slack