

2018-11-26 Resource Access Meeting Notes

Date

26 Nov 2018

Attendees

- [Andrea Loigman](#)
- [Holly Mistlebauer](#)
- [Cate Boerema](#)
- [David Bottorff](#)
- [Sean Thomas](#)
- [William Weare](#)
- [Kai Sprenger](#)
- [Lisa Perchermeier](#)
- [Joanne Leary](#)
- [Mark Canney](#)
- [Deb Lamb](#)
- [Katharina Haas](#)
- [Kimie Kester](#) (
- [Rameka Barnes](#)
- [Susan Kimball](#)

Discussion Items

Time	Item	Who	Description	Goals
5min	Housekeeping	Andrea Loigman	<ul style="list-style-type: none"> • Notetaker - Sean Thomas 	
15min	Resource Access Reports	Holly Mistlebauer	<p>We have identified both in-app and data warehouse Resource Access reports (review document here)</p> <ul style="list-style-type: none"> • In-app reports are being developed by the Product Owners • Data warehouse reports are being developed by the Reporting SIG members <p>Have Resource Access reports for your institution been identified?</p> <ul style="list-style-type: none"> • View institution overview here • View all Resource Access reports here • View all User Management reports here (there may be overlap) <p>If there are more reports needed, what should RA SIG members do?</p> <ul style="list-style-type: none"> • Work with your Reporting SIG member to identify reports • Reporting SIG members are aware of steps for adding a new report • One step is to contact me for help in determining if report is in-app report 	
20min	Request policy vs loan policy: which fields belong where	Cate Boerema	<p>Request policy vs loan policy: which fields belong where. To answer this question we need to decide:</p> <ul style="list-style-type: none"> • Whose patron group should be considered when deciding things like is this requestable, can it be delivered, alternate loan policy for items with existing requests, recall return interval. <ul style="list-style-type: none"> • Because there can be requests without loans, at least some of these must look at the requester's patron group • But others seem like they really ought to look at the borrower's patron group • Settings related to the borrower's patron group really ought to live in the loan policy (simpler from a development perspective and clearer from a user perspective) 	<p>Review every setting in the current request policy mock-up and decide which patron group is the determining factor</p> <p>Based on the above, agree on which settings belong in the loan policy vs request policy</p>

Meeting Outcomes

Functional Area	Product Owner	Planned Release (if known)	Decision Reached	Reasoning	Link to Supporting Materials	Comments

<i>e.g. loans, fees/fines</i>	<i>Name</i>	<i>e.g. Q4 2018, Q1 2019</i>	<i>Clearly stated decision</i>	<ul style="list-style-type: none"> • <i>Because</i> ... • <i>Because</i> ... 	<i>e.g. mock-up, JIRA issue</i>	
Requests	Cate Boerema	Q1	<ul style="list-style-type: none"> • SIG is open to moving loan-related settings to loan policy - no firm decision, just an openness • Cate to present some revised mockups for further review and discussion 		Request Policy Mockup	For later: <ul style="list-style-type: none"> • We need to discuss Rush recalls - new feature • We need to discuss how request queues are prioritized. SIG no longer happy with FIFO approach for v1. Recalls likely need to bump to the top of the queue

Notes