

# 2018-09-24 Resource Access Meeting Notes

## Date

24 Sep 2018

## Attendees

- [Darcy Branchini](#)
- [Emma Boettcher](#)
- [David Bottorff](#)
- [Jana Freytag](#)
- [Anya Arnold](#)
- [Cheryl Malmberg](#)
- [Carsten Schwill](#)
- [Sean Thomas](#)
- [Joanne Leary](#)
- [Rameka Barnes](#)

## Discussion items

Time	Item	Who	Notes
5 min	Housekeeping	<a href="#">Darcy Branchini</a>	<ul style="list-style-type: none"><li>• Note-taker - Rameka Barnes</li></ul>
20 min	Patron Notice Logic - Fee/Fine - policies and manual charges	<a href="#">Darcy Branchini</a>	
5 min	Fast Adds	<a href="#">Anya Arnold</a>	<a href="#">Notes from 8/31 Cross SIG Fast add meeting</a>
remaining time	<a href="#">Header Pane &amp; Shelving Lag Time</a>	<a href="#">Emma Boettcher</a>	

## Notes

Announcement: Darcy mentioned that Tania time has been reduced to 25% for this project and Tania thought it would be best to hand off the Request subgroup. Darcy will be taking over the group and have scheduled several mtgs with Tania to review what is happening in the group.

### Patron Notice Logic - Fee/Fine - policies and manual charges - Darcy Branchini

**Recap on Patron Notice Logic** - Darcy did a quick review of what was last discussed with patron logic. She reviewed that the logic is separate from the templates. Patron notice templates are located in **Settings > Circulation > Patron notices**. You will have out of the box and custom notices. There has been questions regarding where the logic would sit. For loans, it was sitting in loans policy ( ie Courtesy notices around overdue policies). One request was the ability to reorder notices (chronological order). Left that meeting with concerns regarding Fee fines. Darcy met with Holly and reviewed Fee/Fine policies and manual charges.

### Patron Notice Logic - Fee/Fine - policies and manual charges - Darcy

Molly and Darcy meet and have three things to think about in the Fee/Fine policy

1) Overdue fee fine policy - Fines need to be tied to the rule / loan policy. There has to be a way for the loan policy and fine policy to interact. Loans group pushed back on request group. The loan group does not want anything about requests in loan policy? All agreed that this has to be worked out with developers and request group. This is fundamental and needs to be sorted out.

2) Lost fee fine policy

3) Manual charges - Discussed manual charges and Darcy wanted to know do we need two types of notices, a charge notice and a receipt notice?

Need a default template for charge notices and that a damage item have a note field to add type of damage.

Was suggested that for miscellaneous Fees that the system recognize what it is for. For ex. If you are using the "damaged" type that a canned message, "You are being charged because the item is being returned damaged".

Charge and Pay now button suggestion made to have logic in place the option just gets a receipt notice not have a notice and receipt sent at the same time.

For now, Darcy will go further with Notices being as a separate policy and tie them in using the rule. Loan Rules should be called Circulation Rules because it is connecting loans policies, notice policies, fee/fine polices and request policies together – suggested that we rename Loan rules to Circulation Rules

Sean Thomas introduced himself as the new PO on loan rules and policies, he will talk with Holly to see how loan rules and policies overlap with Fine/Fees and how to move forward.

**Fast Adds - Anya Arnold**

Anya reported that they had a meeting and discussed what is needed and what some required fields could be in a form to add quick records. Stephanie will be designing the page.

**No remaining time for Header Pane & Shelving Lag time (Emma Boettcher)**

**Action Items:**

Darcy will follow up with Holly to get clarification on the comment and additional fields when adding a manual charge with the charge and pay now button. Need to know which is an internal comment vs external comment.

Rename Loan Rules to Circulation Rules

I may have not added all the attendees, please add your name if you attended.

