

2019-11-4 Resource Access Meeting Notes

Date

04 Nov 2019

Attendees

- [Andrea Loigman](#)
- [Erin Nettifee](#)
- [Emma Boettcher](#)
- [Rameka Barnes](#)
- [Joanne Leary](#)
- [Mark Canney](#)
- [Andy Horbal](#)
- [Elizabeth Chenette](#)
- [William Weare](#)
- [Jana Freytag](#)
- [David Bottorff](#)
- [Kai Sprenger](#)
- [Brian Arrigo](#)
- [Donna Minor](#)
- [Cornelia Davis](#)
- [Carsten Schwill](#)
- [Darcy Branchini](#)
- [Kemie Kester](#)
- [Cate Boerema](#)
- [Magda Zacharska](#)
- [Mary E Yokubaitis](#)
- [Kelly Drake](#)
- [Regina Frindt](#)
- [Allison Estell](#)

Discussion Items

Time	Item	Who	Description	Goals
5min	Housekeeping	Andrea Loigman		<ul style="list-style-type: none"> • Notetaker - William Weare • Meeting schedule for November. No meeting 11/28, but what about 11/25? • Reminder: fill out User Record Card Sort. Due by Friday 11/8 • Reminder: Please send Cheryl test scenarios for calculating due times for 24-hour+ library hours • WolfCon 2020 - Texas A & M (College Station, TX) January 22-24
10min	Items	Emma Boettcher	Missing items, withdrawn items	If an item is missing or withdrawn, can it still be checked out?
15min	Call numbers	Cate Boerema	Effective call number block on request record	<p>https://drive.google.com/drive/folders/1rcXHY-3HoGifjhJdFVM56Fvev9Znzan</p> <p>Review effective call number block on request record and decide:</p> <ol style="list-style-type: none"> 1. Should the label be "Effective call number block" to be consistent with the item record or just call it "Call number" here? 2. Along those lines, for some reason, effective location was labeled "Shelving location" on the request record. Should we change that while we are in here? 3. Call number isn't present as a column in the request search results. Does it need to be? 4. If yes: <ul style="list-style-type: none"> --- Does it need to be sortable? Use case? --- Label? 5. Note: current thinking is that each page displaying the call number block will assemble the correct elements in the correct order (instead of storing the assembled block or creating a shared utility that puts the elements together in a certain way). Why? It sounds to me like institutions may eventually want to be able to configure how their call number blocks display (elements, order, separators). If this is a possibility, we should avoid investing development effort in driving consistency at this point.
10min	Notes	Emma Boettcher	Check in and check out notes	Decide: should check in and check out notes use the Notes feature, which allows users to reuse predefined notes?
20min	Documentation	Erin Nettifee & Andrea Loigman	Discuss documentation needs	<p>Review existing documentation and work on a structure to update it.</p> <p>Individual Apps: Information, Tips, and Tricks</p> <p>also FOLIO App Information, Tips, and Tricks</p>

Meeting Outcomes

Functional Area	Product Owner	Planned Release (if known)	Decision Reached	Comments
Requests	Cate Boerema	Q4	<ol style="list-style-type: none"> 1. "Effective call number string", since block has a specific meaning in circulation 2. Yes rename "Effective location" 3. No need for column as long as data is in exports and on detail screen 4. N/A 5. Okay <p>SMEs also requested that we move the Effective location down one row and have it to the left of the Effective call number string</p>	
Loans	Emma Boettcher	Q4	<ul style="list-style-type: none"> • Ask user to confirm (or override) when checking out a Missing or Withdrawn item. Assign this ability to a specific permission • Reusable notes around check in and check out are a nice to have. May be helpful until "needed for" state is implemented, but not worth doing unless it's done well. • "Effective call number string" also applies to loans contexts 	

Notes

Announcements:

Meetings in November: No meeting Thanksgiving Day, November 28; we will meet on Monday, November 25.

Reminder: Fill out [User Record Card Sort](#). Due Friday 11/8

Send Cheryl test scenarios for calculating due times for 24-hour+ library hours

Link to WOLFcon in College Station (January 22-24): <https://openlibraryfoundation.org/about/wolfcon/>. There is a call for participation: [FOLIO Plenary suggestions](#) & [FOLIO meeting requests](#).

(1) Missing items, withdrawn items (Emma Boettcher)

Item missing and cannot be checked out; we need option to check this out;

Can we have a button on the modal, proceed with checkout? Yes.

Withdrawn? This doesn't necessarily mean that it is suppressed.

Same option available? Make a decision pop-up here as well.

If we did check it out, would it show up in a report? An override report?

[LDP? Library data platform]

(2) Effective call number block on request record (Cate Boerema)

Create request

Call number block: prefix + effective call number + suffix + volume + enumeration + chronology + effective copy

Okay to call it *effective call number block*?

Let's use the word *string* instead of *block*.

Shelving location: rename to effective location? Yes.

We do not have call number in the request search results. Do we need it here?

No, we don't need to add it here.

For the export, the call number components will be in their own columns + call number sort code.

Heads-up: current thinking that effective call number string will be assembled by pages that display it rather than storing it somewhere.

Request page: Can the shelving location and call number be located adjacent to one another?

(3) Check out and check in notes (Emma Boettcher)

Item record in inventory: ability to add notes and assign; are reusable notes of interest?

Notes need to stay within the app; we don't need to see all types of notes in all apps.

This is kind of a nice to have. How would we use this?

(4) Discuss documentation needs (Erin Nettifee & Andrea Loigman)

Confluence: section labeled FOLIO app information tips & tricks;

Click on Check in to see template.

How do we want to move forward with this?

Next steps? Use Slack to communicate?

We might volunteer people on our staff; they will need a confluence account.