

2018-11-29 Resource Access Meeting Notes

Date

29 Nov 2018

Attendees

- [Holly Mistlebauer](#)
- [Deb Lamb](#)
- [Emma Boettcher](#)
- [Tania Fersenheim](#)
- [Joanne Leary](#)
- [Kai Sprenger](#)
- [Katharina Haas](#)
- [Kimie Kester](#)
- [Cate Boerema](#)
- [Rameka Barnes](#)
- [William Weare](#)
- [Mark Canney](#)
- [Susan Kimball](#)
- [Cheryl Malmborg](#)
- [David Bottorff](#)
- [Lisa Perchermeier](#)
- [Sharon Wiles-Young](#)

Discussion tems

Time	Item	Who	Description	Goals
5min	Housekeeping	Holly Mistlebauer	<ul style="list-style-type: none"> • Notetaker - Sharon Wiles-Young 	
40min	Request and loan policies	Cate Boerema	<p>Review new mockups and discuss if the settings are now in the right place for request management</p> <p>Request Policy Mockup</p> <p>Recall interval and Cate will verify the return interval and minimum guaranteed period computation</p> <p>Default request policy for requests and have the option to specify request policy --Shawn will lead a discussion on this</p> <p>Cate asked questions about pickup location for requests-remote campuses/remote users so need the pick up location choice</p> <p>Item status in parking lot for requests policy</p> <p>Rush recall type of requests? Do we need this type?</p>	
20min	Circulate non-circulating items	Emma Boettcher	<p>Discuss failed checkout- policy says item should not circulate-options:</p> <p>Ask user due date and time- change due date; override failed check out then system asks user to select a loan policy which option? Go with option modify due date and will the system fall back or default to loan rule? Emma will check with Shawn</p> <p>2 scenarios: no loan policy--this item cannot be loaned</p>	Decide scope of override: apply new policy, or just set due date

Meeting Outcomes

Functional Area	Product Owner	Planned Release (if known)	Decision Reached	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>	<i>e.g. mock-up, JIRA issue</i>	

Requests	Cate Boerema	Q1 2019	<p>Loan Policy Mockup:</p> <ol style="list-style-type: none"> Moving request policy settings to loan policy makes sense For recalls, we don't need both "alternate period at checkout..." and "minimum guaranteed loan period". For all institutions represented on the SIG today, these would always be the same. Let's just remove "alternate loan period..." SIG wanted to make sure Andrea Loigman was okay with this. For recalls, we don't need the ability to allow renewals. No one on the call thought they would do that. They might use change due date or renewal override in this case, but they don't need this setting. It would be good to have a way to launch the Change due date functionality from within the Request record. For Holds, there shouldn't be a "recall return interval" Should we have a section in the Loan policy for Pages? Those are, by definition, for items not on loan. Yes - we should because there can be a queue of page requests that has accumulated for an item and we need to know what to do when the item is checked out. FOLIO will look at the type of the next item in the request queue to determine which settings to use at checkout. We know that the FIFO queue management we have is insufficient in the long-run but we will address that in a later call. When an item is recalled, calculate today's date plus the recall return interval. If the resulting date (RD) is sooner than the original due date (ODD), use the RD. If the RD is later than the original due date, use the ODD. If the RD is less than the minimum guaranteed due (MGD), use the MGD. Cate needs to confirm this logic with the SIG <p>Request Policy Mockup:</p> <ol style="list-style-type: none"> Settings looked good to people No one actually thought they would need to set delivery options separately for each request type as shown in the mock-ups but we wanted to check with Andrea Loigman before consolidating. Talked about request by item status setting and whether that should be configurable in the request policy or not. Answer: No. We talked about configuring this at the tenant level and everyone thought that would work. UXPROD-1320 That said, it was suggested that some institutions may want to have different request to item status configurations by location. Wanted to get this on the parking lot. <p>Loan Rules:</p> <ul style="list-style-type: none"> People were okay with leveraging the current loan rules editor to target additional policy types. One each of request, loan and notice policies. Talked about there being a fallback policy for each type that would be used if nothing else was specified. Cate suggested that was the only "inheritance" allowed. Darcy questioned how this would work given there is nesting in the loan rules editor and we deferred further convo until Sean was back. 		
Loans	Emma Boettcher	Q1 2019	Select due date and assume other aspects of the loan (e.g., non-renewable), if overriding a loan policy that says an item is non-circulating		

Notes