2018-12-06 Resource Access Meeting Notes

Date

06 Dec 2018

Attendees

- Andrea Loigman
- Emma Boettcher
- Cate Boerema
- David Larsen
- David Bottorff
- Deb Lamb
- Joanne Leary
- Anya Arnold
- Mark Canney
- Darcy Branchini
- Jana Freytag
- Kai Sprenger
- Kimie Kester
- Sean Thomas
- Tania Fersenheim
- Wendy Wilcox

Discussion tems

Time	Item	Who	Description	Goals
5min	Housekeeping	Andrea Loigman	- Notetaker - Emma Boettcher - Reporting - RA vs. UM responsibility - Reporting Master Spreadsheet	
5min	Logic for due date calculation check	Cate Boerema	Review of logic for truncated due date calculation	Have I captured the expected logic correctly in the SIG meeting notes? (#8 under Loan policy mockup section in Meeting outcomes section): https://wiki.folio.org/display/RA/2018-11-29+Resource+Access+Meeting+Notes
20min	Request-related notices	Darcy Branchini	UI options	Decisions on UI and field options for request related notices.
20min	Disabling and deleting service points	Cate Boerema		What if a SP is created by accident or is no longer in use? Deleting SPs is challenging because of the various dependencies. Should we inactivate instead? What's the expected behavior in both cases for locations, requests and loans that use the SP?

Meeting Outcomes

Functional Area	Product Owner	Planned Release (if known)	Decision Reached	Reasoning	Link to Supporting Materials	Comments
e.g. loans, fees/fines	Name	e.g. Q4 2018, Q1 2019	Clearly stated decision	- Because... - Because...	e.g. mock-up, JIRA issue	

Requests	Cate Boerema	Q1	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.	- Originally proposed logic assumed we never want to extend the original due date when an item is recalled because recalls should shorten loans, not extend them. Both Andrea and Kai thought this logic would work best for their needs. - That said, it turns out some institutions *do* want to extend the original due date for recalled items (e.g. Chicago). This is because the original loan may have been renewable with a low fee structure. You want to give borrowers a bit of time to return the item in the case of a recall, as they may not have been expecting to have to return at the original due date and because the fee structure may now be much steeper - We could make this a configuration option in the loan policy (e.g. "never extend original due date when recalled") - Andrea asked we put this in the parking lot - Those not wanting to extend the loan when recalled could set the recall return interval to 0 - When the item is recalled prior to the Minimum guaranteed loan period, this gives Andrea and Kai exactly the behavior they wanted - But when the item is recalled after the Minimum guaranteed loan period, a recall return interval of 0 doesn't give the patron much (any!) time to return the book. - Andrea concluded she would set the recall return interval to 1 day and accept that it would sometimes extend the original loan period. Kai would set the recall return interval to 0.		

Notes

UM reporting update

- Previously: gap between collections use vs. patron reports where nothing was added because everyone thought it was someone else's responsibility
- Definitions emerged:
    - RA reports: defined as users' use of library materials
    - UM reports: data about users
- Action items: look at the reporting master spreadsheet. Is an RA report missing? If so, contact a member of the Reporting SIG

Due date calculation

Problem

How do minimum guaranteed loan period, original due date, and recall return interval interact when an item has been recalled?

- Always use current date + recall return interval = new due date?
- Check to see if original due date is earlier than current date + recall return interval?

Stress case: using the recall return interval to extend any loan by X number of days may have the effect of _extending_ a loan, even on a non-renewable item

- Chicago currently does this (and does not have recalls on short-term loans), Duke does not

Proposed solutions

Workaround: Use recall return interval to set up the appropriate degree of generosity to the patron whose item has been recalled

- If your recall return interval is 1 day, the loan period is 7 days, and the minimum guaranteed loan period is 7 days
    - Then Days 1-6, if the item is recalled, the original patron gets a 7 day loan
    - Then Day 7, if the item is recalled, the original patron has to turn it in on day 8, getting an extra day without even renewing the item
    - Then Days 8-infinity, if the item is recalled, the original patron has to return it the next day (and they've already gotten it beyond the guaranteed 7 days)
- Can set recall return interval to 0 if the recalling patron should never be kept waiting

Ideal (parking lot): Create a separate setting at the policy level (not tenant) to decide whether original due date or current date + recall return interval is used

Request notices

Question about whether the policies are containers for (loan, fee/fine, request) and a loan rule points to one container, or are the policies broken up and the circ rule points to individual policies

- Container model raises concern of whether you'd be able to pick out the policies you want quickly

Request notice configurations

Fields in policy:

- Template used
    - Will show any template that has a category of request
- Format (either inherit from patron preference or force a particular format)
    - Email is the only option available at first, but Chalmers & other schools need print notices
    - Need report about failed notices
- Frequency
- Event trigger
    - Action item: Darcy will make a list of the events she's already aware of, such as the item arriving at the pickup location
    - List of events will be hard-coded at first. May be able to add events, but not in the first version

Darcy showed possible configurations for request available, request available reminder, cancellation, and hold expired, as well as for recall notices