

2019-7-22 Resource Access Meeting Notes

Date

22 Jul 2019

Attendees

- [Andrea Loigman](#)
- [Andy Horbal](#)
- [Cheryl Malmborg](#)
- [William Weare](#)
- [Anya Arnold](#)
- [Cornelia Davis](#)
- [Darcy Branchini](#)
- [Donna Minor](#)
- [William Weare](#)
- [Kai Sprenger](#)
- [Emma Boettcher](#)
- [Elizabeth Chenette](#)
- [Kelly Drake](#)
- [David Bottorff](#)
- [Erin Nettifee](#)

Discussion Items

Time	Item	Who	Description	Goals
5 min	House keeping	Andrea Loigman		<ul style="list-style-type: none">• Notetaker - William Weare
30min	Notices	Darcy Branchini	Fee/fine tokens for patron notices	We are starting work on sending manual fee/fine charge and payment notices, so we need to add related fee/fine tokens, such as fee/fine type, fee/fine owner, balance, amount paid, etc. I'd like to have a decision regarding which tokens are needed. As a starting point, rows 57 -76 on this sheet - https://docs.google.com/spreadsheets/d/13Xnb7j-xt0CZrgD9zRuH3OBX_bxR8FNI94F52Lom9gM/edit?usp=sharing .
25min	Items	Emma Boettcher	Needed for: possible gaps	Does Needed For need analogous fields/records/functions to Requests (expiration date, effect on loan due date, similarity to rush recalls?).

Meeting Outcomes

Functional Area	Product Owner	Planned Release (if known)	Decision Reached	Comments

Notes

Notices – Darcy Branchini

Patron notices – tokens, loan data, change to circ, patron and item

What kind of notices do we need for fees/fines?

Would you take multiple actions on a fee/fine at the same time? How would that be represented?

We need tokens on the template to integrate this information.

Fee owner

Fee type (damaged, locker fee, etc.)

Fee amount

Fee balance (balance for each individual fee/fine or balance on account for this patron, or both? Comprehensive? Send a notice once a quarter (for example): total of current fee/fine; not for go live.

Would individualized fee/fines result in multiple notices going out at the same time?

If fee/fines are determined by location, a comprehensive notice could be confusing (if it represented one location only).

What if notices were bundled by policy type? Re: overdue or aged to lost.

Timing? Real time? If not, when is it happening? By session.

Manual fee/fines: For manual fee/fines, is bundling a thing? Or does this not happen?

Are they going to be batched in some way?

Example: if three of five items are returned damaged, we would want the charges related to the three items to be on the same notice.

Item related tokens:

Include all of these or just a subset? All.

Fee action type & fee action amount

Vs.

Fee payment amount, fee transferred amount, fee waived amount, and fee refunded amount

Is the latter group needed?

Fee accrual period. What does this mean?

Items – Emma Boettcher

Availability, needed for, process

Availability: where is this item right now?

Process: if the item's availability is In process, what process is it in?

Needed for: What will the item be doing in the future?

Potential feature overlap?

Needed for: staff indicate that they need item for processing

Requests: patron indicates that they need item for loan

Rush recall: items are recalled back from patrons to fulfill a staff process

Is there an overlap here? Is needed for a duplicate? No. Some instances of needed for would necessitate a request.

Dummy patrons:

What for dummy patrons do we need to for needed for?

Or, what are the problems with dummy patrons?