Item status (item state) subgroup

Meeting schedule

Last Monday of the month, 10-11 Eastern (Zoom)

Slack: item-status-group

Topics

- Permissions around changing item status
  - 2020-04-13: Setting up permissions for "from" & "to" is ideal
- Changing item status (Availability) from item record
  - 2020-04-06: Decided to allow changing the item status from most statuses, except On order or items that are in current loans
  - 2020-04-13: Decided to allow changing the item status to most statuses, except for statuses relating to loans, Awaiting pickup, or Awaiting delivery. Recently returned - no need to make it work. On order - still TBD.
  - 2020-04-27: RM SIG will have final say on whether an item status can be changed to On order. Later decided that this should be allowed.
- Custom item status
  - 2020-04-06: Decided that a custom item status would allow user to control behavior in Check Out, Check In and Requests apps.
  - 2020-04-27: Reviewed wireframe of custom item status. Behavior in Orders and Receiving can default to unchecked; all other customizations higher priority.
  - 2020-07-27: Ability to delete item status
- Customizing built-in item statuses
  - 2020-04-06: Suggested as topic for discussion
  - 2020-07-27: Highest priority is changing name and configuring requests whitelist for statuses. Other item status
- Changing item status in bulk (UI)
  - 2020-04-06: Suggested as topic for discussion
  - 2020-07-27: Same restrictions as changing item status on individual item record
- Changing item status on backend
  - 2020-07-13: Can change an item status from On order through Data Import, and can create records with the status On order through Data Import. (Differs from allowed behavior in Inventory). Also cannot change an item status from Paged, Awaiting delivery, or Awaiting pickup through Data Import (differs from allowed behavior in Inventory).
- Availability, needed for, process (3 part item state)
  - 2020-03-30: Overview
  - 2020-04-06: Overview
  - 2020-06-01:
    - Decided that whether to warn users before checking in items where Process is not null should be a tenant-level (at least, perhaps Process-level) configuration.
    - An item can be Needed for "X" while its Process is set to "X". If an item is Needed for "X" and has its Process set to "X", that does not affect the Needed for, and vice versa.
    - If users try to check out an item where Process is set to "X", then ask for confirmation. If confirmed, continue check out and set Process to null. User is responsible for editing Needed for to "X" if the item needs to reenter that Process when checked in.
    - If an item is Needed for multiple things (X, Y), users manually clear and set Needed for and Process when handing off an item between different departments.
    - Being able to edit other parts of the item record while changing item state is preferable over isolating item state changes on their own screen. Being able to edit all three elements of item state at once is preferable over having to edit each individually.
  - 2020-06-08
    - Configure Needed for and Process on the same screen in Settings, as opposed to setting them up independently. Eventually, configure per process whether to alert a user at check in that that process is on the item, but OK if that is a tenant-level setting at first.
    - Item record: add note for Availability, Needed for and Process fields (these notes will clear if that field changes). For each value, show when and who updated it (the "who" needs to be configurable for tenant, as does all staff tracking information).
  - 2020-06-15
    - Instance record: Display Availability and Process where item status currently displays
    - Item record: Display only Availability in at-a-glance information at top of item record. Create separate accordion for Process and Needed for.
    - Check In: if there is at least one Needed for and at least one patron request on an item, require user to choose which to fulfill.
  - 2020-07-06
    - Prioritization of Needed for can be a separate feature from introducing a Needed for at all: include a default prioritization for each Needed for, with the ability to reorder NF on an individual item
    - Check In modals: RA SIG should decide whether to split or separate
  - 2020-07-13
    - Display Needed for when item is checked in, even if it's not checked in at home location
  - 2020-07-27
    - Display corresponding notes (or truncate) in other apps. Showing a count of Needed for is not helpful.
- Status/item state log
  - 2020-06-22
    - Can be part of general change tracker UI, with modifications:
      - field that's changing should be reported as separate column
      - each change should be its own row
      - App where change is conducted should be recorded
      - Search & filter on type of record (for status history, would only want to retrieve item records)
• 2020-07-27: include enough context to know not just which API initiated change but in what context API is called (e.g., differentiate between checking out through FOLIO check out app & some other self-check out system). Service point (brought up by RA & by 5Colleges) is helpful.
• Use of item status for dummy items

Documents

• Item status implementation list in FOLIO (Google Drive)
• Item statuses from RA member institutions (Google Drive)
• Tips & tricks: item state in FOLIO (FOLIO wiki)
• Item status folder (Google Drive)
• Wireframes
  • Custom item status
  • Settings for Needed for and Process
  • View item record (for checked out item)
  • View item record (for in process item)
  • Edit item record
  • Status history
• Item states epic in JIRA with links to features

Membership

• David Bottorff
• Erin Nettifee
• Susan Ponischil
• Martina Schildt
• Natalie Sommerville
• Christie Thomas
• Laura Wright

Product owners: Emma Boettcher