2020-09-03 Resource Access Meeting Notes

Date
03 Sep 2020

Attendees
Sharon Wiles-Young
Andrea Loigman
David Bottorff
Holly Mistlebauer
Mark Canney
Andy Horbal
Laurence Mini
Cynthia Lange
Emma Boettcher
Joshua Lambert
Brooks Travis
Darcy Branchini
Cornelia Awenius
Joshua Lambert
Thomas Paige
Mary E Yokubaitis
Jana Freytag

Discussion Items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Description</th>
<th>Goals/Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>5min</td>
<td>Administ rivia</td>
<td>Jana Freytag</td>
<td>• Update on Reports for RA <a href="#">Vandana Shah</a> likes to visit our SIG to answer our questions and talk about RA Reports she asks to give us examples we’d like to see in FOLIO • cancelling next Monday's meeting 20/09/07 due to holiday</td>
<td>• Notetaker - <a href="#">David Bottorff</a></td>
</tr>
<tr>
<td>20Min</td>
<td>Fee/fine record</td>
<td>Holly Mistlebauer</td>
<td>After loan data has been scrubbed, loan data on Fee/Fine Record is still available. We need to do something about this!</td>
<td>Slide deck available <a href="#">here</a>.</td>
</tr>
<tr>
<td>15Min</td>
<td>Circ log</td>
<td>Emma Boettcher</td>
<td>Anonymization of circulation log</td>
<td></td>
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</tbody>
</table>

Meeting Outcomes

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Product Owner</th>
<th>Planned Release (if known)</th>
<th>Decision Reached</th>
<th>Reasoning</th>
<th>Link to supporting materials</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>e.g. loans, fees/fines</td>
<td>e.g. Q4 2018, Q1 2019</td>
<td>Clearly stated decision</td>
<td>• Because... • Because...</td>
<td>e.g. mock-up, JIRA issue</td>
<td></td>
<td></td>
</tr>
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</table>
### Circ Log

<table>
<thead>
<tr>
<th>Loans</th>
<th>Emma Boettcher</th>
</tr>
</thead>
</table>
|       | Any check out overrides should have opportunity to add note | Whether notes should be required should be discussed at future meeting

### Circ Log Anonymization

<table>
<thead>
<tr>
<th>Loans</th>
<th>Emma Boettcher</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Anonymize circ log using same settings as other anonymization</td>
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</tbody>
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### Notes

**Notes by David Bottorff**

#### Reporting SIG visit

- happy to come and wants to know what we want to talk about and would like some examples
- review of what in-app reports are available or in planning for upcoming releases to preview - Holly will set up an RA in-pp report filter in Jira

#### Scrubbing Fee/Fine data Holly

- links between loan details and fee/fine details are broken, goes off to neverland
  - what should the behavior be? grey out loan details and add parenthetical: Loan details (anonymized)
  - view link replace with anonymized without a link
- some loan data remains in fee/fine data after scrubbing
  - options include
    - 1. scrubbing closed fees after x interval
    - 2. only linking to loan details and lose data when scrubbed
    - 3. scrub only item related info after fee fine closed after x interval
- Jana-preference would be for option 1
- US institutions in general seem to prefer option 3 - need to see fine history, etc.
- no one likes 2
- consortia need different retention policies for different institutions
- David - for option 3 what data would be retained that isn’t now?
  - recalled, item type, loan policy, etc.
- Any other thoughts place them on slack channel

#### Circ Log Anonymization Emma

- loans can be anonymized automatically or manually
- none exists for requests, fines, notices, further away in development time
- circ log should match schedule when loans are anonymized and also match settings for other anonymizations when those are developed /discussed
- doing it once so settings work across the system makes sense to everyone

#### Overrides Comment

- should override comment be required or not?
- Jana-allow comment to be required or not in settings
- consensus seems to be that having the option to configure whether it is required or not-this already exists in settings for other notes etc. Jana will look for examples, Optional as the default setting