2020-09-17 Resource Access Meeting Notes

Date
17 Sep 2020

Attendees
Holly Mistlebauer
Andrea Loigman
Mark Arnold
Elizabeth Chenette
Cornelia Awenius
David Bottorff
Joanne Leary
Anya Arnold
Mark Canney
Kimie Kester
Sharon Wiles-Young
Emma Boettcher
Laurence Mini
Brooks Travis
Molly Driscoll
Carsten Schwill
Mary E Yokubaitis
Donna Minor
Cate Boerema
Thomas Paige
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>Administrivia</td>
<td>Jana Freytag</td>
<td>Reminder: on Friday the App Interaction SIG wants to discuss this and has asked for use cases on printing in FOLIO please add them here: <a href="https://docs.google.com/document/d/17yBcEyVJqjmoiu-GVT1xn4isE_XX2dgHqCudn2Um8/edit">https://docs.google.com/document/d/17yBcEyVJqjmoiu-GVT1xn4isE_XX2dgHqCudn2Um8/edit</a></td>
<td>• Notetaker: Elizabeth Chenette</td>
</tr>
<tr>
<td>10min</td>
<td>Recently returned &amp; requests</td>
<td>Emma Boettcher</td>
<td>Decide whether to allow Recalls, Holds, Pages on items with the status Recently returned If pages are allowed, should the item status change to Paged?</td>
<td></td>
</tr>
<tr>
<td>30min</td>
<td>Actual Costs</td>
<td>Holly Mistlebauer</td>
<td>Changes to Actual Cost processing based on developer input</td>
<td><a href="https://docs.google.com/presentation/d/1x9H2yBNa3QCFPrlggyOpWr_y2JxSSfgGu6FQqCrJHQ/edit?usp=sharing">https://docs.google.com/presentation/d/1x9H2yBNa3QCFPrlggyOpWr_y2JxSSfgGu6FQqCrJHQ/edit?usp=sharing</a></td>
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</tbody>
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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>Name</td>
<td>e.g. Q4 2018, Q1 2019</td>
<td>Clearly stated decision</td>
<td>• Because...</td>
<td>e.g. mock-up, JIRA issue</td>
<td></td>
</tr>
<tr>
<td>Loans</td>
<td>Emma Boettcher</td>
<td>Allow only page requests on item status Recently returned</td>
<td>Add check in service point/time to pull list</td>
<td>Similar to requests allowed for Available items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fees/Fines</td>
<td>Holly Mistlebauer</td>
<td>SET COST will use Fee/fine type of ‘Lost item fee’ and ACTUAL COST will use Fee/fine type of ‘Lost item fee (actual cost)’</td>
<td>Easier for reporters to determine which is which</td>
<td>Holly ask the Reporting SIG after the RA SIG meeting was over</td>
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Notes

Emma Boettcher -- decide whether to allow Recalls, Holds, Pages on items with the status “recently returned”; If pages are allowed, should the item status be changed to “paged”?

Emma showed the group the request type whitelist, specifically so that the group could look at “recently returned” status in relation to “available” and others. She said “recently returned” was not yet on the development calendar and one library was asking about this feature.

Should “recently returned” item status be handled similarly to “Available” related to recalls, holds, and pages?

Group mentioned they would like to be able to control these settings at tenant level down the road. There was a question about how long “recently returned” would stay the status on a returned item. Answer: Shelving lag time field on service point is configurable. Item will change from recently returned to available status based on that setting.

When the item is paged, then status will change to “paged.”

Group consensus:

Recall allowed on “recently returned”? No

Hold allowed on “recently returned”? No

Page allowed on “recently returned”? Yes

Some discussion on workflow for using the pull list for paged items. It was suggested that it would be very helpful to have last checked in date show up on that report (to aid staff in finding items that may have been recently returned and then paged). Last touched date also mentioned, and both were thought to be useful, but group would be happy with either one.

Holly Mistlebauer -- changes to Actual Cost Processing based on developer input

For lost items that require actual cost processing, a report and how it would display were worked on previously. After talking with developers, the plan and the report were adjusted. The mock up showed items that were declared lost and aged to lost with info in multiple columns. The report could show all items of both item statuses. Date ranges could be specified. Columns could be sorted.

Criteria for items in the reports:

• Declared lost – Item status = Declared lost
• Declared lost & Aged to lost – No existing fee/fine action with fee/fine type = “lost item fee”
• Declared lost & Aged to lost – Loan record still exists
• Aged to lost – Item status = Aged to lost
• Aged to lost – LostItemHasBeenBilled is set to “true”

Columns:

• Paton name, patron group, patron barcode (clickable)
• Loss type
• Date of loss
• Loss details (can click on view in this column)
• Instance, material type, item barcode (clickable)
• Effective call number string
• Permanent item location
• Fee/fee owner
• Fee/fee type
• Actual cost to bill patron (can fill this in)
• Additional info for staff (can fill this in)
• Additional info for patron (can fill this in)
• Actions – Charge fee button

After charge fee button is clicked, a confirmation modal appears. Actual cost to bill patron amount is not editable after that.

Would need to partially waive amounts on the patron’s record to adjust if a mistake was made when entering too large of an amount.

Would need to Add and additional lost item fee to patron’s record to adjust if a mistake was made when entering too small of an amount.

Items discussed:

Long book titles – suggestion 2 line wrap

ISBN – would be useful (comes from the instance record)

Mix of aged to lost and declared lost items – could that be a filter on the report to only get one or the other?

Fee/fine owner – could that be a filter on the report to only get the fee/fine owner that you needed?

Two options presented related to the way info would display on the report in relation to Set cost versus actual cost:

1. Use fee/fine type “lost item fee” for both set cost and actual cost (with transaction info for set cost = blank, and transaction info for actual cost = actual cost charged).
2. Use fee/fine type “lost item fee” for set cost, but use different fee/fine type for actual cost. Would not need transactional info to distinguish between set and actual costs. If preferred, what would the actual cost fee/fine type be called?

Time ran short. Holly will take this question to the Reporting SIG to find out their preference. She will report back to RA SIG.