

## Resource Sharing & Fulfillment Community Call

Thursday, May 14, 2026

<https://orbiscascade-org.zoom.us/j/86432546990>

11am - noon

# Agenda and Minutes

**Attendees please add your name as you join the call (refresh if you**

**can't edit when you arrive):** Sarah Willhite (GFOX), Lori Hilterbrand (Alliance), Brendan Spah (WWU), Bahram Refaei (Linfield), Victoria Kerr (UID), Renee Corbett (WALLA), Lara Elliott (Lewis & Clark), Rima Reves (OSULP-Corvallis), Sage Workman (WSU-Spokane), Sarah Boser (UP), Jenny Bornstein (L&C), Ruby O'Connor (COCC), Kaitlin Cushman (Gonz), Lucy (Clark College) Alison Dillon (OHSU), Cassandra Palmore (UPS), Valerie Sterling (OSU), Elda Hughes (COCC), Ari Kirby (WHITC), Taylor Kaplan (PNCA), Lizzie Aubrey (Lewis & Clark), Charlotte Waite (OIT- KF), Bota (UW), Amy Thielen (WSU Pullman), Chris Wiley-Smith (WSUV), Morgan Gwynn (MHCC), Julie Drengson (OSU-Newport), Brian McManus (WSU-Pullman), Takoda Hagberg (OSU-Corvallis), Jada Pelger (UPS), Abby Mason (OSUCOR), Katrina Ehrnman-Newton (SOU), Laura Hutton (GONZ) Kate Smith (UO), Nell Hartke (UW), Katie Bowler (OSU-Newport),

**Notetaker:** Roman (Rima backup)

**Timekeeper:** Rima

## Icebreaker (5 minutes) - All

- What celebrities/historical figures share your birthday?
  - <https://www.famousbirthdays.com/>

## Announcements (Lori, 5 minutes)

- Future recognition, retirements, new jobs or other announcements?  
Please contact Lori, Todd, or Lara if you'd like your news shared during a Community Call

- [Anonymous Ask](#) - If you aren't comfortable speaking or chatting in the meeting, use this form to let us know what questions you have and we'll try to answer them at a future open call, in an email, etc. It is truly anonymous so you won't receive a direct response
  - What should we do when a patron returns a Summit book without the book band? (Lara)
    - [Returned without Bookband \(GONZ Template\)](#) - make your own version if you feel so inclined!
    - It doesn't need to be super official - Post Its work too!
  - As we've started the AAR Process, I've noticed that there are quite a few records floating around in our system from previous years that didn't get resolved correctly. If I have items with comments like "AAR 2019" and "AAR 2022" on them that haven't been completed or removed from patron accounts, what is the best protocol for handling these? (Lori)
    - Almost everybody has these lingering
    - If there are comments from both the lending and borrowing library you can close those
    - If you're really unsure, just reach out to the partner library when you have spare time!
    - Both libraries have to mark it as "Request Completed" for it be taken care of

## Salesforce Cases and Support Calls (Lori, 5 min)

- Lori puts out a monthly call for Salesforce calls - hasn't gotten any in the past 3 months!
- These calls are very valuable if you're having a persistent issue
- Duplication of Quick Links in Alma - multiple people are encountering this issue and someone might have submitted a case to support?
- If Lori sees a case languishing, is it okay for her to reach out to see if it needs to be escalated?

## Feature Release (15-20 min)

- [Alma May Feature Release](#)
- Resource Sharing (SSG)
  - Brendan- Quick Mentions
    - Alma now supports RFID in the Shipping Items page

- Updated options for Doc Delivery login - can configure labels and color settings
  - OCR for Received Documents - any digitally supplied PDF will OCR applied when the item is shipped
  - Doc Delivery upload and notification allows borrowers to supply item and send email notices in one step
  - Pickup location field removed for digital resource sharing requests and black request forms
- Bota- Additional Information Field for Borrowing and Lending Requests
  - Has to be configured
  - Added to Request Attributes section - can be added in borrowing requests and edited in lending requests
  - Could be particularly useful for digital requests
  - Ex: "References at the end"
- Ari- Specific Edition Information Available on Lending Requests
  - Not fully set up
  - Seems to default to no specific edition - might not be that useful at this point
- Lori- Partner-Level Configuration for ignore\_lender\_due\_date
  - Currently set to "True" for most Summit libraries
  - Has to be configured locally in the partner settings
  - Allows you to pick someone for this not apply to
  - Consider adding a "Delivery Delay" to account for hold shelf and shipping time
- Pamela- Configure Resource Sharing Library as Temporarily Inactive
  - Don't have to actually go into Configuration to set this up
  - Fulfillment > Resource Sharing > Temporary Inactive Date Ranges
  - You don't have to be a resource sharing person to do this! Fulfillment operators and managers can do this - woo!
- Ellie- Linking from Borrowing Request to Locate Process Log
  - ... > "View Locate History"
  - Displays how the request came to be, what partners it was sent to, and where it finally ended
- Fulfillment (FSG)
  - Prevent Requests for Blocked Loans

- Improved Navigation for Hold Blocks Information
  - Hold off on implementing until there's more resolution, look on Alma listserv for more info!
- Automatic Due-Date Adjustment for Early Patron Expiry
  - Can set it to run whenever you want
- Institutions can now customize copyright status labels
  - Code stays the same but you can change the description of the labels to be whatever you want
- New Alma Digital interface (now called Specto) is available

## FSG - (5-10 min)

- [Dual Locations and Personal Copies](#)
  - Presentation (Sage)
    - Ex: Helpful for handling professor copies of books for course reserves
  - Recommendations for configuration (Victoria)
    - Want to make sure you have "no requesting" rule for this location **AND** it applies to that location - if you still have a requesting rules allowance, people will still be able to request it in Primo
- Shameless request for other course reserves documentation to add to [our Course Reserves webpage](#) (Victoria)
  - Crowd source documentation as Lori calls it!

## Summit and Fulfillment Days!

- Please fill out the surveys from Lori's email, even if you're not planning on presenting!
- Easy - takes only a few mins!

## [INFORMATION COMING ASYNCHRONOUSLY] Helmer Grant - (Roman/Lori, 10ish min)

- What is it? How much money is at play?
- Ideas that are on the table:
  - Central Lending Library of Things (Lori)
    - How would we replace materials once they wear out or are lost?

- What kind of materials could we feasibly lend centrally?  
(e.g., headphones may not be a good idea because they are typically needed on the spot, but a button maker could be great because people can plan ahead for it)
- Scanners and ABBYY Fine Reader access
- Any other ideas?
- Do you want to help this summer?