

Evergreen - Cataloging Interest Group

10/25/2022

2:00 - 4:00pm (Eastern)

HACK-A-WAY ([register](#))

Session Topic: *Item Status Screen Improvements*

See the [wishlist projects](#) spreadsheet for more details.

Background: Suggested projects from conference [brainstorming session](#)

This conversation is open to anyone interested in the project.

Goals to Accomplish:

- Enhanced Troubleshooting – Quick access and consolidation of various views
- Collection Management – Inform weeding/replacement decisions

Suggestions/Discussion:

- Related bug: Port Item Status Interface to Angular: (#[1936233](#))
 - Builds upon work being done for Angular Patron Interface (lp#[1904036](#))

PHASE ONE: *(low hanging fruit)*

1. Rename “**Item Status**” screen to be “**Item Details**”
 - Can be done before angularization – let’s do it now! (ACTION: submit lp bug)
 - May be able to implement before the Patron interface is completely done – because Patron changes may go in as experimental.
 2. Rename “**Quick Summary**” tab to be “**Item Summary**”
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PHASE TWO: *(more advanced stuff)*

1. ITEM ALERTS, NOTES, TAGS

> ACTIONS MENU *(mid-tree fruit, ladder required for dev)*

- Add to list under Add > Add Item Notes and Add Item Tags
- Add to list under Edit > Manage Item Notes and Manage Item Tags

> LIST VIEW *(more significant changes)*

- Change Manage Item Alerts to be a count – move the “manage alerts” to Detail view
 - In the list view we could make the count number a link, instead of having a button to maintain that functionality.
- New - Add Manage Item Notes (with the count as a link) – also add to the Detail view for editing
- New - Add Manage Item Tags (with the count as a link) – also add to the Detail view for editing
- Related bug: <https://bugs.launchpad.net/evergreen/+bug/1827236>

2. RECORD SUMMARY

> ADD ISBN *(mid-tree fruit)*

- Show only one, with a “show more” option – maybe the number of ISBNs in parentheses?

3. CATALOGING INFO Tab in Detail View

> REMOVE “CATALOGING INFO” TAB *(low hanging fruit)*

- MARC record is accessible via Actions menu
- Wait until Angular port to avoid confusion

4. QUICK SUMMARY Tab in Detail View

Rename to “Item Summary” – listed above as low hanging fruit

> NEW STRUCTURE *(more significant changes)*

- General goal: Streamline list and make it sticky
- Add “Preferences” option to allow local field display decisions and save to workstation
 - Similar to Cataloging Preferences
 - Display all fields by default with an option to hide attributes at the consortium level in the staff UI the way you could with the XUL client - *needs discussion*
- Angular Port Page Design Suggestions
 - Would like essentially anything on Holdings Editor to be available on Detail View
 - Suggest making Item Summary tab mimic the visual beauty of the Holdings Editor
 - **Circulation & Collection Management staff input needed** about specific item attribute utilization and order of fields

> SPECIFIC FIELD-RELATED REQUESTS *(mid-tree fruit)*

- Breakout last cataloging edit into separate fields for edit date and staff account
- Move ISBN to Record Summary
- Add access to Item Notes
- Add access to Stat Cats
- Add Parts

> INTERSECTION with RECENT CIRC HISTORY tab *(more significant changes)*

- Move anything related specifically to the last circulation to this tab (ex: duration rules)
- Due date on both tabs (Summary) and (Recent Circ)
- Add rule ID (for duration rules, etc.) / matchpoint ID – in addition to rule name

5. ITEM STATS Tab in Detail View *(wishlist dev)*

- New! tab for statistics
- **Circulation & Collection Management staff input needed**
- Move all creation/change history and circ stats onto new tab
- Enough details such as last circ date for staff weeding decisions
- Limit to Item-Level statistics for now
- Review pre-existing stats for currently availability – *to be updated*
 - All circ stats are currently item-level circs
 - Total circs and total circs - current year
- Statistics Considerations moved to future planning:
 - Handle with Reports for now & future Cataloger Dashboard discussions

- Any requirement for stats beyond single item circs
- Breakout circulation numbers (by org unit?)
- Bib level circs – define as circulations for all items on that title
- Meta level circs??
- Local circs
- Remote circs
- Separate circs -- initial checkout vs renewal tracking needs?
 - Circulation & Collection Management staff input needed
 - Confirmed report is possible
 - I think the idea was "count of total circs" and "count of total circs minus renewals"
 - Circ vs. renewal, not just circs, for collection development can be identified by looking at the Circ History List tab
 - Library need example: if it is an ILL, the state doesn't want renewals counted, just the initial circulation

6. RECENT CIRC HISTORY and CIRC HISTORY LIST tabs *(needs discussion)*

- Circulation & Collection Management staff input needed – how are these used?
- Combine?
- Consider need for anonymous-ness
- Note: if you display 2 most recent circs and you "age" circs, the oldest (or both) circs in the tab will show dates and other non-patron info, but as Andrea mentioned, it'll note that it was an aged circ, instead of having the link to the patron.
- Note: Also worth keeping in mind that your aging and your "display X in the staff client" practices are completely separate from each other.
- Aging settings is a global flag, displayed circs is a YAOUS, by my recollection
- Aging circulations is a process that modifies the actual data in the tables. The "display most recent X" is a library setting that affects only how the information is presented in the staff client.

7. PERMISSIONS *(needs discussion)*

- Wishlist bug exists to make this more granular: not just the current "if edit barcode, can edit anything" – <https://bugs.launchpad.net/evergreen/+bug/1929593>
- Need to create list of individual permissions desired

Other Related Bugs:

- All bugs with [itemstatus](#) tag (*not to be confused with Item Status screen*)
- Item Status screen missing Action "Show last few circulations" (#[1754763](#)) – circ staff question
- Item status refresh after editing can get confusingly slow (#[1821094](#)) – needs testing
- Can't add to Record Bucket from Item Status Detail View (#[1952388](#)) – confirmed still true

- Item Alert Uses Old Interface in Item Status ([#1960883](#))
- Marc edit option from Item Status ([#1176927](#)) – can close this one
- Item Status Alternate View - Needs Option for Next ([#1609950](#))
 - Bug for paging in modals – existing bug? Create if needed
- web client: Item Status Detail View Doesn't Remember the Tab ([#1705790](#))
 - Discussed:
 - This bug – about making the view “sticky” to return to where you were before
 - New bug ? – Allow preference for choosing default view; default should be “summary”
- Wishlist: Add an item status input box to the main splash page ([#1778411](#))
 - Discussed:
 - New customization of main splash page would allow to add this as a link
 - Revisit to identify effort required