Focus Group: Circulation, Booking and Reserves
Agenda

Topics to be discussed:

1. Lost Item Processing
Floris St. Amant (LSU) and Mary Johns (LSU Law Library) will discuss the processing of lost items. The Process Long Overdue and Assumed Lost Reports will be discussed.

2. Upgrade concerns for circulation
Lisa Stigall (LOUIS) will talk about the recent upgrade to 2003.1.3 and the resulting issues.


Circulation
Enhancements
Suspended Holds Feature Added to Circulation
Additional User Search Options
Unicorn Now Allows Up to 50 Bill Payments for Each User Bill
New Properties Added to Register New User Helper
Properties Added to Print User Information on Available Hold Slips in the Discharge/Checkin Wizard and the Trap Holds Wizard
Mark Item Missing and Mark Item Lost Wizards Display an Item’s Current Location
User Profile Information Added to the Display in the Checkout and Renew User Charges Wizards

Corrections
Due Dates Adjusted Correctly for Weekly Loan Periods When Original Due Date Falls on a Closed Date
“Records Are Busy” Message No Longer Displays During Checkout or Discharge While a Hold is Being Removed
Items Could Be Double-charged if Circulate Flag Changed to Yes
Message No Longer Displays During Checkout or Checkin (Communication Failure)
Charge Limits Used in Checkouts – Item Type Limits Now Used
WorkFlows Client No Longer Hangs After Clear Charge Override
User Name Glossary in Circulation Wizard Displays No Longer Show Extraneous “User is Suspended” Message
User’s Library Checked for “Accrue Fine” Setting When Assessing a Suspension Over Library Closed Dates
Default Department and Birthyear Properties in Register New User Helper Corrected
Correct Due Date and Message Displays When User’s Privileges Expire on a Library Closed Date
Incorrect Privilege Expiration Alerts No Longer Displays During Checkout or User Display Available Holds Alert Functions Properly in the Modify User Holds Wizard and the Remove User Hold Wizard
Nonholdable Items That Share Call Numbers With Holdable Items Are Not Selected to Fill Holds
Number of Available Holds Displays Correctly When Using the Available Hold Override
Recall Due Grace Period Considers Library Closed Dates
Specified Duplicate Hold is Removed Correctly
Reshelving Slips Print Correctly in the Remove User Hold and Remove Item Hold Wizards
Charging Library is Retained on Overdue Bills for Items in a Floating Collection
No Bill is Created for Lost Items When No Item Price and No Default Item Price Policy Exist
Estimated Fines Removed When the Clear Charge Override is Used
Warning Message Displays for Items Assumed Lost

Corrections Made to Lost Item Processing
In Unicorn 2003, the processing of items marked as Lost was greatly enhanced. The following corrections have been made to the new lost item processing.

- When the Mark Item Lost wizard was used to mark an item as Lost, the item’s location was set to a shadowed location, but the shadow counters were not updated. As a result, indexing problems occurred. The lost item processing has been changed to correctly update the shadow counters.
- If the Claimed Lost location (LOST-CLAIM) or the Assumed Lost location (LOST-ASSUM) was removed, the Mark Item Lost wizard or the Assumed Lost (Assumedlost) report would change the item’s current location to an invalid value of -1. The lost item processing has been changed to not mark an item as Lost if the LOST-CLAIM or LOST-ASSUM location has been deleted. The LOST-CLAIM and LOST-ASSUM locations must exist for the lost item processing to function properly.
- The user status was not being examined correctly for library systems that use the User Status by Library Group feature. The effect of this problem was to create incorrect estimated fines. The lost item processing has been changed to examine the user status correctly and properly estimate fines.
- The default price used in the lost item processing was based on the station library instead of the charge library. The lost item processing has been corrected to use the default price set by the charge library.
- At times, the user’s estimated fines could be set to a negative value. The lost item processing has been changed to ensure that estimated fines can never have a negative value.

Estimated fines and accrued fines were not displaying correctly when items were marked as Lost and then renewed. The generation of an overdue bill when a lost item is renewed causes the item’s accrued fines to be subtracted from the estimated fines, and the amount of the overdue item bill to be added to the estimated fines. To ensure that accrued fines are never subtracted twice, the computation of estimated fines has been changed as follows.

- When an item is marked as Lost, the accrued fines from the charge are subtracted from the estimated fines.
- If the lost item is renewed, the accrued fines from the charge are added back to the estimated fines. Then the accrued fines in the charge record are reset to zero.

Lost Item Message Remains Visible as Tabs are Selected
Label Changed on Checkouts Tab for Clarity – All to All Active
Copy Number in Item List on Checkouts Tab Shows Full Copy Number
Item Lookup Helper Display Corrected in the Circulation Wizards
Correct Default Library Setting Retained When Other Set Properties Windows Are Open
Alternative ID Does Not Display in List of Matching User Records if Display of Alternative ID is Suppressed
Renew Privilege Helper Works When User Status Headers Are Displayed

Check Item Status Wizard
Corrections
Complete Date Displays in the Notified By Field of the Check Item Status Wizard
Check Item Status Wizard Shows Destination Library for Items in Transit
Call Number and Item ID For Items in Transit Print Clearly in Check Item Status Wizard Display
Bill A User Wizard
Corrections
Bill Reason Retained After Using the User Search Helper in the Bill a User Wizard

Checkout Wizard
Enhancements
Checkout Wizard Displays a Glossary and the Pay Bills Helper When a Checkout Generates a Bill
Corrections
Number of Checkouts and Bookings Display When Using the Item Lookup Helper in the Checkout Wizard
Checkout Wizard Correctly Renews Items Marked as Lost or Assumed Lost
Overrides Required for Subsequent Checkouts
User ID Field Cleared in Checkout Wizard When Automatic Restart Property is Selected
Negative Number No Longer Displays in the Checkout Wizard's Group ID Field
Checkouts Can Be Cancelled From Lost Item Override
List of Current Checkouts Property Setting Honored If Global Properties Used
Incorrect Expiration Message No Longer Displays in Alerts Helper for the Checkout Wizard

Discharge/Checkin Wizard
Corrections
Comments Display Correctly for Checkins
Incorrect Message No Longer Displays and Loops When Discharging Two Copies of a Title With a Title Level Hold
Checkout and Discharge/Checkin Wizards Changed to Handle Lost Items
Default Payment Type Displays When Paying Bills at Discharge

Copy User Wizard
Corrections
Incomplete User Record No Longer Created When User Cancels in the Copy User Wizard

Modify User Wizard
Corrections
User Status Manually Set With the Modify User Wizard Can Only Be OK or BARRED
Acquisitions Message No Longer Displays When Using the Modify User Wizard

New User Registration Wizard
Enhancements
User Record Duplication Checking Added to New User Registration Wizard (optional)
New Properties Added to Register New User Helper
Corrections
Correct “Insufficient Privilege” Message Displays When a User Attempts to Register a User With a Higher Profile
**Confirm Address Wizard**

**Corrections**
Lookup Library Default Used When Returning From a List of Matches in the Confirm Address User Wizard

**Suspend User Wizard**

**Corrections**
Message Alerts Staff When User Suspensions are Shortened Because of the Maximum Suspension Amount

**User Display Wizard**

**Corrections**
- User Edit Override No Longer Displays Unnecessarily When Modifying User Records
- Corrected Display of Selection List Properties for User Display Wizard
- All Information Tabs Display When Searching for a User Record by Name in the User Display Wizard
- Full List of Charges Displays on Checkouts Tab in User Display Wizard
- Individual Library Name Can Be Selected in User Display Wizard Properties
- Outreach Interests and Histories Information Displays in the User Display Wizard When Global Property is Set
- Checkouts Tab Displays Correct Count of Charges for User With Many Checkouts

**Mark Item Lost Wizard**

**Corrections**
- Pay Now Button Displays in the Mark Item Lost Wizard
- Messages No Longer Display When Using the User Search Helper in the Mark Item Lost Wizard
- Mark Item Lost Wizard Prints Item Price and Processing Fee on Receipts and Bills
- Dynamic Indexing Occurs Correctly After Items are Marked as Lost
- Mark Item Lost Glossary Shows Correct Price and Amount Billed

**Place Hold Wizard**

**Enhancements**
Pickup Library Default Added to the Place Hold Wizard Properties

**Corrections**
- Correct Number of Copies Are Sent to Pickup Library After Trapping Copies for a Blanket Hold
- Message No Longer Displays When Creating a Blanket Hold - “No entry set for _COPY_FROM_ENTRY()” now “Blanket hold not found”
- Place Blanket Hold Wizard Shows Correct Hold Totals and Handles Incorrect Override Codes

**Trap Holds Wizard**

**Corrections**
Messages No Longer Display in Trap Holds Wizard for Items With No Holds But Should Go In Transit

**Renew User Charges Wizard**

**Corrections**
- Renew User Charges Wizard No Longer Displays Message When Only Alternative IDs Are Used
- Reserve Desk Displays in Renew User Charges List If Global Properties Used
Ephemeral Checkout Wizard
Corrections
Item Lookup Helper Works Correctly in the Ephemeral Checkout Wizard

Pay Bill Wizard
Enhancements
Owes Glossary Changed to a Bill Information Window
Corrections
Message Appears If User Tries to Enter Payment in Individual and Total Payment Sections
Renew Privilege Helper Replaces the Renew Privilege Behavior Property in the Pay Bill Wizard
Message No Longer Displays When Paying Bills for Lost Reserve Items

User Lost Card Wizard
Corrections
User Lookup by Name and Library Corrected in the User Lost Card Wizard
Interests and Histories Options Settings Used in the User Lost Card Wizard Properties
Charges, Holds, and Unpaid Bills Display in the User Lost Card Wizard

Materials Booking
Corrections
Charge Receipt for the Charge Booking Command Displays the Correct Call Number and Item ID for Each Booked Item

Create Booking Wizard
Corrections
Start of Preparation Time Correct When Creating a Booking Following a Closed Date
Group Bookings Are Created Correctly After a Previous Booking is Charged
Message Changed for When Group Booking Does Not Have Enough Resources
Booking ID Created Correctly When an Item is Unselected for a Group Booking
Messages No Longer Display When Creating a Group Booking Using Fixed Time Slots

Reports
Enhancements
Run Now Button Added to Setup and Schedule New Reports Wizard and Scheduled Reports List Wizard
Next Step Button Added for Finished
Updated Display Report Scheduler Status Helper Message More Accurately Reflects Current Status
“Library Address on Notice” Selection Options Enhanced
Order of Output Options Changed, Primary Address of Library User Record Used in Notices Reports

Finished Reports Wizard
Corrections
Finished Reports Wizard Lists Reports by Completion Date
Administration Group Reports
Enhancements
New Report Added to Allow First Available Copy to Satisfy a Recall Request
“Too Many Categories” Message No Longer Displays When Running the Transaction Statistics (Statistics) Report

Corrections
Notification Added to Load Standalone Transactions Report If Existing standlog.combined File Found
Line Ending Messages No Longer Display and Output Label Corrected in the Charge and Bill Update Detail Report

Booking Group Reports
Corrections
Packing List of Bookings (Bkgpackinglist) Output Corrected

Circulation Group Reports
Enhancements
Bill Selection Options and Report Output Options Added to Some Circulation Reports
Bill Selection and Notice Output Consider Library Options
Two Bill Selection Options Added to Remove Users Report
Date Recalled Selection Added to Hold Selections
User Status Selection Added to the Assumed Lost (Assumedlost) Report
Message Does Not Display as Frequently When the List Onshelf Items with Holds (Pullonshelfhld) Report Runs During the Day

Corrections
Notify User Via Phone Option Changed from MAIL to PAPER
Bill Totals by Bill Type Report Uses Currency Symbol Defined in Configuration File
“Auto Email to Recipients” Option Added to the Assumed Lost Report
Overdue Item and Bill Information Prints Correctly for the Combined Overdue/Bill Notice Report
List Onshelf Items With Holds Report Correctly Excludes Items With Locations That Do Not Allow Holds
Users With Available Holds Report Does Not Select Inactive or Unavailable Holds
Process Long Overdue Items (Longoverdue) Now Consistently Edits Current Location
Bill Totals By Bill Type (Typetotal) Rounding Corrected
Current Hold Statistics Report Includes Holds on Titles Without Copies
User Address Labels Report Sorts Output Correctly By Zip Code/User Name
Circulation Mailer (Mlrcirc) Report Displays Message When Page Width Exceeds Specified Column Widths
Assumed Lost Item Remains Charged to User When Only the Lost Item Processing Fee is Waived
New Sorting Options Added to Assumed Lost (Assumedlost) Report to Ensure One Notice Prints for All of a User's Lost Items
Date Due Selection Added to the New Overdue Notices Report
Hold Recall Report (Holdrecall) Recalls Title Level Holds
Update User Delinquency Status Report (Setdelinq) OK to DELINQUENT Corrected
Lost and Processing Fee Values Added to Assumed Lost (Assumedlost) Report
Addresses and Extended Information in User Records Load Correctly
Clean Holds Shelf (Cleanholdshelf) Report Transaction Library Corrected
Notice Printing Restored in the Assumed Lost (Assumedlost) Report
Text Report Group
Enhancements
New Reports Added to Support the Enhanced User Search Feature
Three new reports have been created to support the Enhanced User Search feature, which allows library staff to search for user records by extended information or addresses. The new reports are named as follows.
• Add, Delete, Update User (Aduusertext) – Will run daily
• Rebuild User Database (Rebldusertext)
• Reorganize User Text Dictionary (Reorgusertext) – Will run weekly

User Group Reports
Corrections
Invalid Policy Message Removed from Update User Status (Setuserstatus) Report
Current User Statistics Report Gives Results
User ID Recorded to History Logs When Using the Update User Status Report
List of Suspensions Report Honors User Suspension Selections, Prints Selections in Report Output
Library Selection in User Suspension Selection

My Circulation Group Reports
Corrections
Collection Status (Collectionstat) Report Uses Library Selection to Customize Output
Reports Selecting by Group ID Now Match Exactly
Detailed List of Overdues, Bill Report (Overduesbills) Corrected

Reserves
Corrections
Due Date Automatically Truncated to Closing Time For Reserved Materials Checked Out Before the Reserve Desk Closes
Modification to the Reserve Control Record Expiration Date Saved Correctly When Individual Reserve Record Expiration Date Also Modified
Inactive Reserves Can Be Displayed if Instructor Has at Least One Active Reserve

Create Reserve Wizard
Corrections
New Status for Individual Copies Uses Selected Setting as Default
Display of Fields Corrected on the Basic Info and Copies Tabs in the Create Reserve Wizard

Standalone
Corrections
User ID Allows a Maximum of Twenty Characters
2003.1.3 Sub-Release Notes

Circulation Enhancements
Library Groups Can Be Selected for User Record Searches

Corrections
Information Overlap Corrected in Remove Item Hold Wizard and Checkout Windows
"User Record is Locked" Message No Longer Displays When Making Several Edits in User Records
Search is Now the Default User Search Type
Alerts Added to Checkout Wizard and Discharge/Checkin Wizard When an Item Has an Upcoming Booking or Reservation
Operator Policy HOLD LIBRARIES Override Code Reinstated
Number of Bills Counter in the Item Record Increments Correctly When an Overdue Item is Renewed
Title Level Holds Made Available for Single Libraries Using Oracle Systems
Warning Messages Display for Correct Copy of a Title
Default Search Library Retained When Starting Another User Search
"Empty Screen" Message No Longer Displays When a Single Matching Record is Found with User Search Helper in Certain Wizards
Current User Option Matches the Correct User ID to the Correct User Name
Insertion Point Displays in Text Entry Box When User Search Window Opens
Patrons Who Paid For Overdue Lost Items No Longer Blocked During Checkout
Incorrect "User Has Unpaid Bills" Alert No Longer Displays When Selecting the Current User Option
Items Lost and Paid For Not Included in Checks for Item Limit

Checkout Wizard Corrections
Hold Cancelled Correctly When Checking Out Item to Another User
Extend User Privilege No Longer Generates a Continuous Loop in the Checkout Wizard
Message No Longer Displays When Checking Out an Item Located by a Call Number Browse Search Option Check Boxes Removed From User Search Helper Properties in the Checkout Wizard

Discharge/Checkin Wizard Corrections
Platform Displays Fines for Correct Users in Discharge/Checkin Wizard
Holds Display Button Shows Hold Information for a Single Matching Record in the Item Lookup Helper of the Discharge/Checkin Wizard
User Information Does Not Print on Available Hold Slip if Properties Cleared in is charge/Checkin Wizard Properties
Item Record Displays Correctly When the Item Search Helper is Used in the Discharge/Checkin Wizard
Bill Alert Displays at Item Discharge For Correct User
User Information Displays When User ID Display Button is Selected in the Checkin List

Mark Item Lost Wizard Corrections
Multiple Items Can Be Marked As Lost At One Time
Billing Information Can Be Entered for a BLOCKED User When Marking an Item as Lost
Modify User Holds Wizard
Corrections
Full List of Holds Displays After Available Holds Are Viewed in the Modify User Holds Wizard

Modify User Wizard
Corrections
Modified User IDs Are Dynamically Indexed Properly After Staff Corrects Problems When Editing User Records
Selecting Make More Changes Option Goes to Correct Window in Modify User Wizard

New User Registration Wizard
Corrections
Return to User List Option Added So User Can Continue Viewing Duplicate User Records
Changes Made to New User Registration Wizard for When User Duplication Checking is Selected
User Profile Not Changed When Viewing Duplicate User Records in the New User Registration Wizard

Pay Bill Wizard
Corrections
Pay Bill Wizard Pays Bills Only for Libraries in Bill Maintenance Library Policy
“Charge Database Error” Message No Longer Displays When Billing the User for a Lost Recirculated Item
Date Returned Added to Charge Information Shown in the MORE Glossary When Paying a User’s Bills

Place Blanket Hold Wizard
Enhancements
Message Changed For Call Number Browse When Placing Title Level and Copy Level Blanket Holds
Corrections
Place Blanket Hold Wizard Uses Selected Default Search Property When Searching User Records
Title Level Blanket Hold Placed Correctly on Selected Titles with Multiple Copies or Volumes

Renew User Charges Wizard
Corrections
User’s Name Added to the Renewal Slip for the Renew User Charges Wizard

Suspend User Wizard
Corrections
Suspend User Wizard Returns to the Identify User Window When Suspending the Same User Again
Suspend User Wizard Clears User Information From Display Between Suspensions
User Display Wizard
Corrections
Override Message No Longer Displays When Making Edits That Do Not Require an Override in the User Display Wizard
User Display Wizard Window Shows Complete Label, Does Not Overlap Patron Photo With User Information

User Lost Card Wizard
Enhancements
User Lost Card Wizard and Helper Assign New User ID Instead of Duplicating User Record
Corrections
More Display Button Shows Bill Information in the User Lost Card Wizard

Materials Booking
Corrections
Booking Display is Complete When Searched by Booking ID

Create Booking Wizard
Corrections
Shipping Time Computed in Materials Booking Scheduling
When Booking Circulation Period Longer Than Acceptable, Error Message Displays
Shipping Time Now Considered
Down Arrows Usable in Search Results for All Wizards

Charge Booking Wizard
Corrections
Charge Booking Wizard Uses Correct Circulation Rules

Modify Booking Wizard
Corrections
Selecting Extended Info Tab When Reviewing a Modified Reservation or Booking Keeps Record in Review Mode

Reports
Corrections
Report Owner No Longer Appears in Display Report Scheduler Status Helper
Option to Select Library Address is Enabled When “Library Address on Notice” Option is Set to Yes
Messages Display and User Returned to Scheduling Window if Invalid Date or Time Entered to Schedule a Report
Date Range Gadget Displays All Digits Specified for a Sliding Date Range
Format Report Property Setting Used When Displaying Finished Reports Within the Schedule
New Reports Wizard
User Category Selections Added to Display Choice for Transaction Statistics Gadget in Statistical Reports
Selecting Users with Specified Extended Information Corrected
Run Now Scheduling Option Runs Duplicated Reports as Soon as Possible in the Scheduled Reports Wizard
Report Name Displays as a Read-Only Field
Warning Messages Display When Running Certain Reports

**Circulation Group Reports**

**Enhancements**
- Bill Selection Criteria Added to the Failed Calls Report
- Report Can Change Patron’s Status to BARRED When Marking Items as Assumed Lost
- List Onshelf Items with Holds Report Enhanced With More Random Selection of Items to Fill Holds
- Correct Hold Information Report Finishes More Quickly With Changes in Catalog Key
- Comparisons
- New Report Added to Print Circulation Mailers for Users Who Could Not Be Contacted by Sirsi Voice Automation (SVA)
- Using Circulation Mailer Forms
- Order Information
- Additional Sorting Options Added to Some Reports

**Corrections**
- Failed Calls Report Prints Notices for Holds, Overdue Items, and Bills
- Individual Bill Notices Report Shows Correct Information for Bills Not Associated With an Item
- Notices Can Emailed to Patrons With an Apostrophe in Their Email Addresses
- Failed Calls Report Honors Library Selection When Deleting Communication Records
- List Onshelf Items With Holds Report Checks All Item Records for Titles with More Than 500 Item Records
- Message No Longer Displays When Cash Reports are Run for All Workstations
- Message No Longer Displays and the Hold Pickup Notices Report Finishes on Windows Server Systems
- Circulation Mailer Report Honors Bill Selections

**My Circulation Group Reports**

**Enhancements**
- Library Selection Added to Collection Status (Collectionstat) Report for Items, Bills, Holds, and User Status Information
- Failed Calls Report Prints Notices for Bills, Charges, and Holds
- Messages No Longer Display in Update Bill Counts Report Output When No Items Are Selected
- Assumed Lost Report Formats Lost Item Notices to Use Standard Mailer
- Individual Bill Notices Report Output Can Be Sorted By Homeroom
- Expire Holds Report Finishes Properly in Libraries Using Demand Management and Blanket Holds

**My Notices Report Group**

**Corrections**
- Individual Bill Notices Report Completes and Displays in the Finished Reports List

**My Statistics Report Group**

**Corrections**
- Circ Count by Hour Report Finishes Correctly

**Reserve Group Reports**

**Enhancements**
- New Reports Added to Count and List Reservations
- Count Reservations (Reservationcnt) Report
List Reservations (Reservationlist) Report

User Reports Group
Corrections
Update User Delinquency Status Report Runs More Efficiently