

UB Cluster Errors

PROBLEM/BACKGROUND

When charging out UB-requested items to your patrons, your library staff occasionally get the error message: "Database Error: the patron cannot charge this item because it belongs to another cluster and the patron has not requested it". This is related to Endeavor Incident #123905 which was filed by CARLI several weeks ago.

Library staff can resolve many of the cluster error problems. Use the descriptions below to identify the particular cluster error scenario and apply the recommended workflow. Move through the process from top to bottom.

CLUSTER ERROR SCENARIOS/WORKFLOW RECOMMENDATIONS

When you encounter a cluster error situation, work through it systematically as follows:

1. Scenario: The cluster error message displays during a standard UB charge transaction, but the item actually gets charged successfully to the patron.
Recommendation: Whenever a cluster error message is encountered, staff should check the patron's "My Account" screen in the OPAC. If the Charge transaction was processed and the item is charged to the patron, then nothing more need be done. If the item is not charged proceed to Scenario 2 or 3.
2. Scenario: The cluster error message displays during a standard UB charge transaction, the item does NOT charge successfully to the patron, BUT the item displays in the patron's Request Information screen under the "Requests Pending" section. This usually indicates that the item has not been routed to the patron's preferred pickup location. In these cases, the patron has probably not yet received an "Item Available" notice. If this description doesn't fit, proceed to Scenario 3.
Recommendation: Check the paperwork in the item and route the item in at the indicated pickup location. This should place the item "On Hold" for the patron, and should be able to be charged at that point.
3. Scenario: The cluster error message displays during a standard UB charge transaction, the item does NOT charge successfully to the patron, BUT the item displays in the patron's Request Information screen under the "Items Available for Pickup" section. If the item is absent from the "Items Available for Pickup" section, move to Scenario 4.
Recommendation: Staff should try the alternate UB charge workflow as follows:
 - Display the patron's record in the Circ client
 - Click the Charge icon on the Circ client top menu. The patron information should fill in automatically
 - Click the Hold/Recall icon at the top right corner of the Charge window
 - Highlight the item to Charge in the "Items Available for Pickup" section
 - Click the Charge button. The due date will display when you close the Patron Request window and return to the Charge window. If the item fails to charge, try logging out/back in and trying again. If you still cannot charge the item, send these examples to the CARLI Office, with the following information:
 - Item's owning library
 - Item's barcode

Requesting patron's Home library
Requesting patron's barcode

4. Scenario: The cluster error message displays during a standard UB charge transaction, but the item does NOT charge successfully to the patron, AND the item DOES NOT display in the patron's Request Information screen under the "Items Available for Pickup" section. This is an indication that the item has passed the library's Hold Shelf Life interval.

Recommendations:

- a. Use the daily "Hold/Shelf Expired" report to clear out items from your Hold Shelf on a timely basis. Promptly send those items back to the lending libraries.
- b. Increase your Hold Shelf Life interval to 14 days or more. This value is set in the individual matrices for items/patrons in SysAdmin/Circ/Circulation Policies/matrix intervals tab.
- c. Edit your "Items Available" notice templates to emphasize the wording about picking up requested materials. The current generic text in both the printed and email notices is: "Please pickup item(s) before the indicated expiration date". CARLI recommends that you put the word "before" in ALLCAPS. The notice templates are found in your ...Voyager\Reporter folder. The printed notices are accessed in the Crclnotes.mdb file and can be edited in Access. Choose the "I_A_Notice type". The email notice templates are accessed in the NoticeEmail.cfg file in the [I_A_Notice] stanza.

SUMMARY

CARLI still considers the cluster error scenarios #1 and #3 described above to be problems or bugs in the Voyager system. #2 scenarios might be attributed to workflow mistakes, because the item has not been routed in and placed "On Hold" for the patron. #4 scenarios can be prevented by routine Hold Shelf maintenance in each library. When you are faced with Scenario #4 cluster errors, it will be your responsibility to contact the lending library to have the items charged to your patrons. CARLI staff will no longer charge these items on your behalf.

Should you have any questions, contact the CARLI Office: support@carli.illinois.edu .