

## Voyager Version 6.1 Circulation/Universal Borrowing Issues Guide

I-Share libraries may wish to use this guide to diagnose and find workaround solutions for some of the current Voyager problems. Some problems may exhibit the same symptoms, although the underlying causes or issues differ. The issues presented here include both known software bugs and other undefined problems. The latter do not have incident numbers assigned to them. An incident status of “Awaiting Resolution” means that the issue is in an ExLibris queue for a fix in a future release or patch; while a status of “Active” has not yet been analyzed by ExLibris for priority review.

If you can't resolve an issue using one of these workarounds, or if the problem does not match the descriptions provided here, contact the CARLI Office for more help [support@carli.illinois.edu].

### WebVoyage Issues

**Issue #1:** **My Account display missing some items patron has checked out**

**Symptom:** *“I just got an Overdue Notice from XXX Library, but when I go to the My Account screen in the OPAC to renew the items, I can't see the items I have checked out from that library.”*

**Cause:** This results from missing values in the underlying Oracle tables that govern the patron's HOME patron record.

**CARLI Actions Taken:** Reported to ExLibris in January 2007. We think that Circjob29 is causing the problem. As of March 26, 2007, CARLI is running a daily script in all databases to update the Oracle tables immediately after Circjob29 runs. This should fix the problem.

**ExLibris Incident #:** **99036/129025 Active.**

**Staff Workaround:** Contact the owning library and have them renew the item. Using the item barcode, do a UB Charge. From the patron's record, click the “Charge” icon and then scan the item barcode. You might get a “Cluster Error”, but that's OK, the charge should still work. You are just trying to refresh the patron's record. If the patron has multiple items checked out from that library, it only takes one item renewal from the stub record to refresh the display of ALL items from that library on the patron's My Account screen.

**Issue #2:** **Request information missing in patron's My Account screen**

**Symptom:** *“I logged into My Account in the OPAC to check on my requests. When I looked at the Pending Requests section I saw a weird message “?(Unable to retrieve data from XXX Library)”. What does that mean and what is the status of my request?”*

**Cause:** Undetermined. We have seen these types of messages when communication between databases is disrupted.

**CARLI Actions Taken:** Reported to ExLibris 9/2006

**ExLibris Incident #:** **125255 Awaiting Resolution**

**Staff Workaround:** Even though the display is corrupt in the OPAC, the request information does display correctly in the Circulation client. Staff should use the client if the patron has questions about their pending requests.

### Call Slip Issues

**Issue #3:** **Call Slips for items in “Not Charged” status but not on the shelf**

**Symptom:** *“We’re processing our requests in the Call Slip client. When we go to retrieve the item from the shelf, we can’t find it. After checking the item we see that its status is “Not Charged”, so we assume it’s missing.”*

**Cause:** Expired holds—status goes to Not Charged while on borrowing library’s Hold Shelf. However the item is not available to be processed by the owning library when it’s someplace else.

**CARLI Actions Taken:** Reported to ExLibris in July 2006 in 2001.2 and re-opened in October 2006 in 6.1. Suggested to libraries that they extend Hold Life and Hold Shelf Life settings in System Administration. See:  
<http://www.carli.illinois.edu/mem-prod/I-Share/circ/bp-holdlife.html>  
<http://www.carli.illinois.edu/mem-prod/I-Share/circ/bp-holdself.html>  
CARLI also recommended that libraries process their “Hold Shelf Life Expiration Report” on a routine daily basis.

**ExLibris Incident #:** **123110/123905 Active**

**Staff Workaround:** Look for item status of “Not Charged” in the item record. At this point, the only workflow is to unfill the request and let it promote. This problem can be minimized if every library promptly discharges books [to route them back home] with expired holds, so callslip requests can not be placed on them while they are on the borrowing library’s hold shelf. That does not always happen, thus the problem. Staff should consult the daily “Hold Shelf Expiration Report” to determine which items need to be discharged from the Hold Shelf.

**Issue #4:** **Call Slips for items “In transit”**

**Symptom:** *“We’re processing our requests in Call Slip client. When we go to retrieve the item from the shelf, we can’t find it. After checking the item we see that its status is “in transit+”.*

**Cause:** Closely related to Issue #3 above. Some expired holds on UB items that have been discharged and are routing back home get into this + (plus sign) status situation. When the library discharges the item to route it back to the owning library, the “In transit” status takes a secondary position and is ignored by the system. However the item is not available to be processed by the owning library because it’s physically routing back home.

**CARLI Actions Taken:** Reported to ExLibris in Version 2001.2, 11/2004

**ExLibris Incident #:** **100234 Awaiting Resolution**

**Staff Workaround:** Look carefully at item status [status icon in item record]. The visual clue of the plus sign is important. The topmost status is “not charged”. Only workflow is to unfill the

request and let it promote. This problem can be minimized if every library promptly discharges books with expired holds, to get them into the proper item status for routing back home. That does not always happen, thus the problem. Staff should consult the daily “Hold Shelf Expiration Report” to determine which items need to be discharged.

- Issue #5:** **Call Slip Database Error**
- Symptom:** *“While trying to process a UB Request in the Call Slip Daemon, my staff occasionally get a “Call Slip Database Error” message and we can’t fill the request.”*
- Cause:** Call Slip database errors arise when the patron’s pickup location is invalid. Some libraries, over the course of time, have wanted to remove certain circulation points from their pickup location lists. To do this, they have unchecked the Pickup Location value on the circulation happening location screen in System Administration. This accomplishes the task in the local OPAC, but it causes the location in the UC to become “undefined”. This value becomes the default pickup desk value on the request form and most patrons don’t realize that they have chosen this—either not reading the screen or simply doing things as they’ve done before—going with the default.
- CARLI Actions Taken:** Reported to ExLibris in June 2006 on 2001.2; re-opened in 1/2007 on 6.1
- ExLibris Incident #:** **122663/129538 Awaiting Resolution**
- Staff Workaround:** Staff operator working in Call Slip should cancel the patron’s request and re-request the title—choosing a valid pickup location from the drop-down menu in the request form. If identifiable as such, use the library’s main pickup location. This problem can be minimized by the libraries that have edited their pickup location definitions in System Administration. Their patrons might choose this invalid pickup location and inadvertently cause the problem for the libraries trying to process the UB requests. Staff that are authorized to do System Administration in Voyager should re-check the pickup location checkbox in System Administration. Experiment with using a naming convention for the location that advises patrons not to avoid its use.
- Issue #6:** **Local Call Slips Not Promoting**
- Symptom:** *“I process the call slip requests for my library and I’ve been noticing that many of them are ending up in the Dead Request reports, even though there are other copies available in other I-Share libraries.”*
- Cause:** The Request Promotion Circjob32 is failing to promote local call slip requests that have been unfilled by a library. The “Not Needed After Value” is being set to 0 for local call slips.
- CARLI Actions Taken:** Reported to ExLibris 11/2006. As of April 2, 2007, CARLI is running a nightly script to populate the “Not Needed After Value” with a setting of 30. This script runs just before circjob32 [Request Promotion] runs. This should enable the promotion of local call slips and fix the problem.
- ExLibris Incident #:** **126493 Active**
- Staff Workaround:** We had been suggesting that patrons begin their requesting process in the Universal Catalog, but that workaround should no longer be necessary.

**Issue #7:** **Call Slip E-mail Notification**

**Symptom:** *“Patrons have been receiving e-mail notices that their requests will be ready to be picked up in 3 days. This is not the normal format for our Item Available notices”*

**Cause:** The library processing its call slip requests has e-mail notification mistakenly turned ON. This is the default in the call slip daemon and often happens with a fresh manual installation of Voyager clients on a PC.

**Staff Workaround:** The I-Share recommendation is to have Call Slip e-mail notification turned OFF, for both filled and unfilled requests. Transit time and Request Promotion make this type of message inappropriate in our environment. The [Email Options] stanza of the callslip.ini file should be edited to reflect the consortial standard. See: <http://www.carli.illinois.edu/mem-prod/I-Share/circ/V6callslip.ini>

**Issue #8:** **Call Slip/Routing Slip Mismatch**

**Symptom:** *“I printed out my Call Slip list, retrieved the items, and proceeded to fill the requests. When I processed one of them the routing slip didn’t match the printed patron requestor and destination on the Call Slip.”*

**Cause:** Undetermined

**CARLI Actions Taken:** Reported to ExLibris in 2001.2; Re-opened in 6.1 1/2007. CARLI staff and an I-Share library have tested a theory that the I-Share customized callslip.ini is causing the problem, but the problem still occurs even when using the generic Voyager callslip.ini.

**ExLibris Incident #:** **126421 Active**

**Staff Workaround:** Check the stub record for the requesting patron in your database. The routing slip destination is usually correct. Its information should match up with the patron information.

**Circulation Issues**

**Issue #9:** **Route to: Locations are not Valid Pickup Locations**

**Symptom:** *“I recently discharged an incoming UB item, but when the route slip printed it showed a shelving location, not a circulation happening location. I can’t route this in.”*

**Cause:** This happens at the occasional intersection of equivalent location IDs in the borrowing and owning databases. The internal location ID of the Circ Desk at the requesting patron’s library has the same number as the local shelving location that prints on the route slip.

**CARLI Actions Taken:** Reported to ExLibris 6/2006.

**ExLibris Incident #:** **122484 Active**

**Staff Workaround:** Contact lending library and have them directly charge the item to your patron.

- Issue #10:** **Item or Patron Exceptions**
- Symptom:** *"I've been trying to charge some UB items to one of our faculty members. Every time I try I get the error message 'An error has occurred during the processing of your charge transaction'. How can I charge these things to him?"*
- Cause:** At discharge items with certain statuses [Lost; Circ Review; Cat Review, etc.] get tagged with an exception. At charge, if an item requires an override to complete the transaction, the patron record gets tagged with an exception. When a patron record has an exception on it, UB transactions fail to complete and the error message displays.
- Staff Workaround:** This condition usually clears by the next working day—after the circjob runs that creates the library's daily Patron and Item Exceptions Report. It seems to happen more frequently to patrons that have a very high number of items currently checked out. Libraries can lessen the frequency of override situations by increasing thresholds in the 'Patron Rules' tab in System Administration/Circulation/Policy Definitions/Patrons tab.
- Issue #11:** **Title field blank in the Circulation Client**
- Symptom:** *"I was checking on some requests for a patron and when I clicked the 'Hold/Recall Information' several items in the Available for Pickup section had blanks in the title field. This makes it difficult for staff to identify a patron's requests easily".*
- Cause:** This happens when there are diacritics in the title.
- CARLI Actions Taken:** Reported to ExLibris 7/2006.
- ExLibris Incident #:** **123706 Awaiting Resolution**
- Staff Workaround:** Staff must use the patron's My Account screen to identify the requested title(s).
- Issue #12:** **Cluster errors at UB Charge**
- Symptom:** *"A patron came in to pick up his requested item. His notice said that today was the last day to pick it up but I can't charge it. I get this error message: "Database Error: the patron cannot charge this item because it belongs to another cluster and the patron has not requested it".*
- Causes:** Expired holds—status goes to Not Charged and the link to the patron and the item is broken.
- CARLI Actions Taken:** Reported to ExLibris in August 2006. Suggested to libraries that they extend Hold Shelf Life to 30 days in System Administration/Circulation/Circ Policy Definitions
- ExLibris Incident #:** **123905 Active.**
- Staff Workaround:** Workflow dependant on particular conditions. See document "Universal Borrowing Cluster Errors: Descriptions and Workflows" at:  
<http://www.carli.illinois.edu/mem-prod/I-Share/circ/UBClusterErr.pdf>

This problem can be minimized if every library promptly discharges books with expired holds, so callslip requests can not be placed on them while they are on the borrowing library's hold shelf. That does not always happen, thus the problem. Staff should consult the daily "Hold Shelf Expiration Report" to determine which items need to be discharged.

## **Performance Issues**

### **Issue #13:**

#### **Automation Errors**

#### **Symptom:**

*"Since our upgrade to 6.1 we have been experiencing an extraordinarily high number of 'Run-time Automation Error: 440/65099' issues during normal Circulation tasks-- e.g., scanning barcodes during charge and discharge activities. An example scenario when scanning a patron's barcode into the Circ module:  
'Run Time Error 440 Automation Error' you are forced to click 'OK'. After clicking 'OK' the next error message appears: '-Run Time error 91 Object variable or with Block variable not set-' and after clicking 'OK' the Circulation module quits.*

#### **Cause:**

Undetermined

#### **CARLI Actions Taken:**

We've been hearing sporadic reports of automation and run-time errors for some time now. We reported this to ExLibris 10/2006. On our end, we think that the splitting all databases into their own Oracle instance will help to alleviate this problem.

#### **ExLibris Incident #:**

**127866 Active**

#### **Staff Workaround:**

The standard list of things to investigate are:

1. Try increasing your voyager.ini file's Timeout= feature for each stanza. CARLI originally recommended a value of 600 (this setting is in seconds), so try 6000, etc. to see if you find any improvement.
2. Ask your local network administrators if anything has changed in the campus firewall that might affect traffic to CARLI. Refer them to the information at <http://www.carli.illinois.edu/mem-prod/I-Share/secure/newmem-firewall.html> for specifics.
3. If you have WindowsXP on your PCs, ask local PC tech staff to investigate if any settings have changed in the way XP handles the PC's firewall that might affect connectivity. Sometimes we have found that this error is related to the installation of incorrect dll's. Remove the voy\*.dll from the windows/system directory and then re-install the voyager clients. You can simply go to the start button on the PC, go to Find Files, and type in voy\*.dll. You then want to delete these files and re-install the clients.

### **Issue #14:**

#### **Client time-outs**

#### **Symptom:**

*"We have been having a problem with the Voyager clients, specifically Circulation and Cataloging seeming to time-out from inactivity, for a few weeks. Is there some change we are not aware of? Is there something we can do here to alleviate the problem?"*

#### **Cause:**

Undetermined

**CARLI Actions Taken:** We have monitored client/server connections at some I-Share libraries. Some libraries have seen improvements by increasing the idle time that is allowed for open ports on a library's firewall. If you are just suddenly experiencing client time out issues, your problem may be caused by a change in your local or PC's firewall.

**Staff Workaround:** Logout from the client. Log back in again to establish a new session. Quoting from SupportWeb, "For some sites, the Voyager timeout issue has many times been resolved with the following steps: within the firewall, there is an undocumented timeout setting (defaulting to 5 minutes) for "default" IP traffic not otherwise specified by an implicit routing rule. A separate rule was created that encompassed Voyager IP ports, and the timeout was set to 99 minutes. This, in effect, created a separate timeout definition within the firewall for Voyager traffic, resulting in a higher timeout setting. It is important to note that this setting was not documented, and changing the default network timeout setting did not affect this 5-minute restriction. No further issues were encountered after this setting was changed."

### **Patron Record Issues**

**Issue #15:** **Patron Record Suspension**

**Symptom:** *"I asked another I-Share library to suspend one of their patrons recently because of Lost Book bills he owes us, but we've discovered that this patron can still do transactions in our database. Why didn't the suspend action work for us?"*

**Cause:** Manual suspension in the patron's HOME record does not update any current stubs in other libraries' databases—i.e., the record will still transact in the Circulation client [charge/renew]. Suspension will prevent new stubs from being created and will block the patron's ability to place requests in the OPAC, but the stub record doesn't get updated automatically by the manual suspension.

**CARLI Actions Taken:**

**ExLibris Incident #:** **128159**

**Staff Workaround:** The lending library [library with the stub record] can manually suspend its own stubs.

**Issue16 #:** **Patron Record Deletes**

**Symptom:** *"I was trying to manually delete a patron record using the Circulation client, but I keep getting a dialog box that says it can't be deleted due to 'Historical Fines and Fees'. I used to be able to delete patrons with zero transactions, but not anymore."*

**Cause:** With the upgrade to Version 6.1 came a new checkbox in System Administration/Circulation/Miscellaneous called "Allow Deletion of Patron With Historical Fines". The default is to have the box unchecked.

**Staff Workaround:** Check the System Administration setting to allow for the deletion of patron records with historical fines. Historical fines are not active and do not show under the fine/fee icon in the patron record. When you open the "Patron Fines/Fees" screen, click the "Fines/Fees History" tab to see the list of any fines accumulated and paid or waived for the patron. This is what the new checkbox is referring to.