Tracking “Not Charged” Items

I-Share Resource Sharing Forum
June 6, 2013

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The Dilemma

• A Callslip request comes in; but when you go to retrieve the requested item it is nowhere to be found
• You check the item record and the item status says “not charged” – so it should be there

—STOP! Check the item’s create date. If it was just created it may still be in processing.
Not Charged Status – A Review

• An item becomes “not charged” for one of two reasons\(^1\):
  – A discharge scan is performed on the item
    • E.g., a charged book is returned and discharged
  – The item’s hold shelf interval expires
    • E.g., a book sent out via ILL and “on hold” for a patron is never charged to that patron

\(^1\) *Voyager 7.2 Circulation User’s Guide*, 5-18

The Thought Process

• Can’t locate an item for a Callslip request?
• If the item is being requested through ILL, chances are pretty good that it may have gone out via ILL before.
• Perhaps the item is sitting on a hold shelf somewhere...
Tracking Items with Access

- At ONU we created an Access query called UB Routing Archive
- This query will provide you with all of the historical routing information for a given item in your collection – e.g., from, to, date sent, date received
- In its current form, the input value for the query is Item ID – so I quickly run an additional query that converts Item Barcode to Item ID

UB Routing Archive

- In Access, your home database ID is always “0”
- Use the VoyagerDatabases query to identify other IDs
UB Routing Archive

- What do we know?
- What may have happened?

Item Circ History

- This item has not been charged since it was sent on 12/12/12 and received on 12/14/12
Item Status Date

- The item status changed to “not charged” on 1/9/13

Our Findings

- The item is not on the shelf at ONU
- It has a status of “not charged” [Voyager Item Record]
- It was sent from ONU on 12/12/12 and received at UIU on 12/14/12 [UB Routing Archive]
- It was not sent back from UIU to ONU [UB Routing Archive]
- It was never charged after 12/14/12 [Item Circ History]
- Item status changed to “not charged” on 1/9/13 [Item Status window in Voyager Item Record]
- The most likely scenarios:
  - The item expired on the hold shelf and is still there
  - The patron received the item without it being charged to his/her account
Recommendations

• Pull expired items, discharge, and return to lending library; to help with this, run Reporter daily, looking for any Hold Shelf Expired reports
• Train library employees to properly charge ILL items to patrons
• Make use of the available data from Voyager Circulation, Voyager Reporter, and various Access queries

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