Tracking "Not Charged" Items

I-Share Resource Sharing Forum
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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

UB_ROUTING	DB_ID_FROM	DB_ID_TO	DB_ID_PATR	SHIPPED_DATE	RECEIVED_DATE	DB_ID_RECEIVED
173993	0	18	18	2/22/2010 5:38:13 PM	2/24/2010 3:28:16 PM	18
173993	18	0	18	3/19/2010 4:05:13 PM	3/24/2010 10:47:07 AM	0
173993	0	13	13	4/12/2010 8:27:37 AM	4/13/2010 2:04:28 PM	13
173993	13	0	13	6/17/2010 9:02:18 AM	6/21/2010 11:27:03 AM	0
173993	0	56	56	9/6/2010 8:55:56 AM	9/9/2010 3:14:05 PM	56
173993	56	0	56	10/11/2010 10:46:06 PM	10/19/2010 10:08:56 AM	0
173993	0	25	25	1/10/2011 4:37:22 PM	1/12/2011 1:43:40 PM	25
173993	25	0	25	6/16/2011 8:05:42 AM	6/17/2011 11:46:54 AM	0
173993	0	6	6	9/1/2011 8:47:17 AM	9/2/2011 2:52:22 PM	6
173993	6	0	6	10/3/2011 1:03:25 PM	10/5/2011 1:37:42 PM	0
173993	0	48	48	4/22/2012 6:08:41 PM	4/25/2012 12:41:28 PM	48
173993	48	0	48	8/22/2012 11:26:54 PM	8/28/2012 2:48:09 PM	0
173993	0	56	56	12/12/2012 8:21:07 AM	12/14/2012 1:36:29 PM	56

KO - UB Routing Archive

Record: 24 of 43   No Filter   Search

- In Access, your home database ID is always "0"
- Use the VoyagerDatabases query to identify other IDs

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UB Routing Archive

UB_ROUTING ▾	DB_ID_FROM ▾	DB_ID_TO ▾	DB_ID_PATR ▾	SHIPPED_DATE ▾	RECEIVED_DATE ▾	DB_ID_RECEIVED ▾
173993	0	18	18	2/22/2010 5:38:13 PM	2/24/2010 3:28:16 PM	18
173993	18	0	18	3/19/2010 4:05:13 PM	3/24/2010 10:47:07 AM	0
173993	0	13	13	4/12/2010 8:27:37 AM	4/13/2010 2:04:28 PM	13
173993	13	0	13	6/17/2010 9:02:18 AM	6/21/2010 11:27:03 AM	0
173993	0	56	56	9/6/2010 8:55:56 AM	9/9/2010 3:14:05 PM	56
173993	56	0	56	10/11/2010 10:46:06 PM	10/19/2010 10:08:56 AM	0
173993	0	25	25	1/10/2011 4:37:22 PM	1/12/2011 1:43:40 PM	25
173993	25	0	25	6/16/2011 8:05:42 AM	6/17/2011 11:46:54 AM	0
173993	0	6	6	9/1/2011 8:47:17 AM	9/2/2011 2:52:22 PM	6
173993	6	0	6	10/3/2011 1:03:25 PM	10/5/2011 1:37:42 PM	0
173993	0	48	48	4/22/2012 6:08:41 PM	4/25/2012 12:41:28 PM	48
173993	48	0	48	8/22/2012 11:26:54 AM	8/28/2012 2:48:09 PM	0
173993	0	56	56	12/12/2012 8:21:07 AM	12/14/2012 1:36:29 PM	56

Record: I◄ ◄ 24 of 43 ► ►I ►✳ No Filter Search

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

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Item Circ History

ITEM_BARCODE ▾	CHARGE_DATE ▾	DISCHARGE_DATE ▾	PATRON_GROUP_CODE ▾	renewal_count ▾	charge_oper_ic ▾	discharge_o ▾
10000001784287	3/2/2008 9:14:51 PM	3/24/2008 9:26:13 AM	UG	0	illstf	circstf
10000001784287	5/12/2008 2:29:05 PM	6/21/2008 1:57:35 PM	UBReg	0	SYS-UB	SYS-UB
10000001784287	7/20/2008 2:03:38 PM	8/6/2008 9:00:00 AM	UBReg	0	SYS-UB	SYS-UB
10000001784287	8/26/2008 8:05:54 PM	10/3/2008 12:44:23 PM	UBReg	1	SYS-UB	SYS-UB
10000001784287	12/3/2008 4:56:39 PM	1/25/2009 2:09:54 PM	UBReg	1	SYS-UB	SYS-UB
10000001784287	2/25/2010 5:18:43 PM	3/19/2010 4:05:11 PM	UBReg	1	SYS-UB	SYS-UB
10000001784287	4/14/2010 6:31:33 PM	6/16/2010 7:59:00 PM	UBReg	1	SYS-UB	SYS-UB
10000001784287	9/13/2010 11:20:01 AM	10/11/2010 10:46:04 PM	UBReg	0	SYS-UB	SYS-UB
10000001784287	1/18/2011 2:30:57 PM	6/16/2011 8:05:40 AM	UBReg	3	SYS-UB	SYS-UB
10000001784287	8/5/2011 3:47:02 PM	8/26/2011 3:13:39 PM	GS	0	illsuper	circstf
10000001784287	9/5/2011 8:55:39 AM	10/3/2011 1:03:21 PM	UBReg	0	SYS-UB	SYS-UB
10000001784287	5/2/2012 4:05:37 PM	8/22/2012 11:26:52 PM	UBReg	3	SYS-UB	SYS-UB

Record: I◄ ◄ 1 of 23 ► ►I ►✳ No Filter Search

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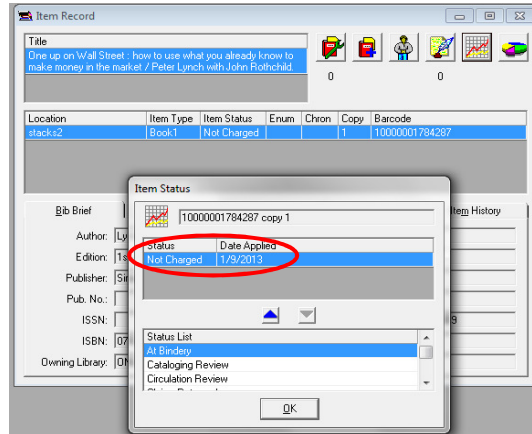
Item Status Date

- 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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