Removing bills and holds from Discard items

One of the more frequently asked circulation/ILL questions I've heard concerns why some items continue to be listed on the **Current Location=Discard** report, even though the monthly **Remove Discard Items** report should have deleted them from this list. In most cases, it's because there's still a bill or hold associated with those un-discarded Discard items and the bills/holds need to be removed before the item can actually be deleted from the database. Niles has found there's an easy way to clear up these problem items by regularly running two reports that identify problem Discard items and allow you to clean up the outstanding bills/holds.

In the following pages of this document I'll try to explain in detail how your library can request the two Discard Item reports and, once you have them, how to use them to resolve problems with items that should have been discarded, but weren't.

The two reports, called **List Discard Items with Bills** and **List Discard Items with Holds**, will be added to your library's list of Unicorn report templates as soon as you submit a request for them to the CCS staff (preferably using WonderDesk). There's an example of how this request might look at the end of this document. Once these two templates have been added to your local Unicorn reports list, you can easily run them whenever you need to.

This document contains:
1. An explanation of how to run the reports.
2. Examples of what the report output looks like.
3. Step-by-step directions on how use them to remove bills and holds from un-discarded items that should have been discarded.
Report 1: List Discard Items with Bills

Report settings:
Use this report to generate a list of all items from your library that have a Current Location of Discard, but still have at least one bill attached. The report has been formatted to use the parameters illustrated here. You probably won't need to make any changes to these parameters once the report has been added to your list of report templates in WorkFlows.

Report example: Criteria for creating a list of Discard items with Bills

Running this report will generate output similar to the following example:

Sample report: List Discard items with Bills

Item List
Produced Monday, December 6, 2004 at 3:22 PM

The Internet for dummies / by John R. Levine, Carol Baroudi, and Margaret Levine Young.
004.678 L665in 7th ed.
*Bills:1
barcode:21491001460000  **NOTE THIS PATRON NUMBER**
name:Example, Elizabeth
amount billed:$1.50  bill reason:OVERDUE  balance:$1.50  NILES
copy:1  id:31491007620853  Library:NILES  Location:DISCARD

HTML for dummies / by Ed Tittel and Steve James.
006.74 H873t
*Bills:1
barcode:21491001463203
name:Mistletoe, Joe
amount billed:$0.30  bill reason:OVERDUE  balance:$0.30  NILES
copy:1  id:31491006670000  Library:NILES  Location:DISCARD
Using information from the List Discard Items with Bills report:

From the Circulation Toolbar
1. Click the Pay Bill wizard.
2. Enter a patron barcode taken from the report.
3. Click the OK button (or hit the enter key).

Example of the Paying Bills: Identify User dialog box

WorkFlows will display the bill record and you can proceed to resolve the outstanding bill.
1. Enter into the Payment field the exact amount needed to clear the record. (In our example, it's $1.95.)
2. From the dropdown list associated with Payment Type, select the option your library's policy dictates. At Niles, they forgive the amount owed, but they use the Cancel type for these kinds of transactions. Your library policy may require that you select one of the other types.

Example of the Pay Bills: Owed by <User Name> dialog box
WorkFlows will display a dialog box that verifies the transaction.
Report 2: List Discard Items with Holds

Report settings:
To generate a list of all items from your library that have a Current Location of Discard, but still have at least one hold attached, the report is set up using the simple set of parameters illustrated here.

Report example: Criteria for creating a list of Discard items with Holds

Running this report will generate output similar to the following example:

Sample report: List Discard items with Holds

Item List
Produced Tuesday, December 7, 2004 at 2:12 PM

The power of magic: secrets and mysteries ancient and modern / Derek & Julia Parker.
133.43 P238po
*Bills:0
copy:1 id:31491007485307 Library:NILES Location:DISCARD

Talismans & amulets of the world / Felicitas H. Nelson.
133.44 N426ta
*Bills:0
copy:1 id:31491007776051 Library:NILES Location:DISCARD

A witch's beverages and brews : magick potions made easy / by Patricia Telesco.
133.44 T269wi
*Bills:0
copy:1 id:31491008011573 Library:NILES Location:DISCARD

Chicken soup for the mother's soul 2 : more stories to open the hearts and rekindle the spirits of mothers / Jack Canfield ... [et al.].
158.1 C533mt
Using information from List Discard Items with Holds:

From the Circulation Toolbar
1. Click the Holds wizard, then the Remove User Holds sub-wizard.
2. Enter an item barcode taken from the report.
3. Click the OK button (or hit the enter key).

When the **Remove Item Hold: Item Search** dialog box displays:
1. Search for items with holds to be removed by entering an item barcode taken from the Discard Items with Holds report. (See report example above)
2. Click the OK button (or hit the enter key).
When the **Remove Item Hold: <call number>** dialog box displays:

1. Verify that the item's title and barcode are correct and place a checkmark in the box labeled **Remove**.
2. Click the OK button (or hit the enter key).

**Remove Item Hold: <call number>** dialog example

![Remove Item Hold: 133.43 P238po](image)

List of Holds

<table>
<thead>
<tr>
<th>User</th>
<th>Level</th>
<th>Status</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIK PROBLEM - Niles Problem Card</td>
<td>COPY</td>
<td>unavailable</td>
<td></td>
</tr>
</tbody>
</table>

Verify that title and barcode are correct

Remove: All

Remove: Selected

OK 1

Close 2

WorkFlows will verify that the hold has been removed.

**Remove Item Hold: <call number>** confirmation example

![Remove Item Hold: Holds Removed for 133.43 P238po](image)

Remove Item Hold: Complete

route to: DISCARD

1 HOLD REMOVED

Remove Holds for Another Item 1

Close 2
Hold Cancellation Notices

Currently, only one library (Niles) is receiving printed Hold Cancellation Notices from the CCS computer room, and no one is sending them to patrons - probably because, unlike GEAC, the format of the notices generated by Sirsi requires an individual mailer be used to send them out. (The example below has been modified to conserve space - An actual notice is more than one page long.) If you want to begin receiving Hold Cancellation Notices at your library, open a WonderDesk call record that looks like the example on the last page.

Hold Cancellation Notice example
========================================================================
Sunday, December 5, 2004

Niles Public Library District
6960 Oakton Street
Niles, IL
60714

Sandy Dimitri
7704 W Monroe St.
Niles, IL
60714

This is to inform you that hold(s) you placed have been removed.
We are sorry that we were not able to fill your request.
1  The reptile room / by Lemony Snicket ; illustrations by Brett Helquist.
   Snicket, Lemony.
   call number:JF SNICKET
   Hold Reason:Hold was cancelled

2  The wide window / by Lemony Snicket ; illustrations by Brett Helquist.
   Snicket, Lemony.
   call number:J FICTION SNICKET
   Hold Reason:Hold was cancelled
========================================================================
**Requesting Item Discard reports for your library**

To request that the two List Item Discard reports be added to your library's report templates list, and/or have Hold Cancellation Notices sent to your library, open a WonderDesk call record that looks like the following:

![WonderDesk request/New call example](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Ken Victorson</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail Address</td>
<td><a href="mailto:kerv@ccs.nsls.lib.us">kerv@ccs.nsls.lib.us</a></td>
</tr>
<tr>
<td>Category</td>
<td>Report Requests</td>
</tr>
<tr>
<td>Subject</td>
<td>List Discard Items reports (&amp; cancel notices)</td>
</tr>
<tr>
<td>Description</td>
<td>Please arrange to have (2) List Discard Items report templates added to &lt;lib name&gt; WorkFlows report template list. ALSO: Send Hold Cancellation Notices to the library.</td>
</tr>
<tr>
<td>Emergency</td>
<td>System Emergency</td>
</tr>
</tbody>
</table>