# Training

## SIERRA CIRCULATION

# Notices Troubleshooting Guide

## Notices

- Patrons receive recall notices, but the items don't have recalls on them
- Overdue notices or bills not generated when expected
- Checked-out item appears on an item paging slip or item paging list
- When preparing statements of checked out items, the word "Error" appears in the Circulation Text drop-down box
- Error "Failed to initialize notices sending" when preparing notices
- Courtesy notices are not being sent as auto notices
- Staff created and saved a notices job but cannot see it in the saved notices table
- After preparing and sending notices, some notices display in the Items Not Sent tab with the error message "Text number is 0"
- Patrons are not receiving emailed notices
- Overdue notices or bills sent too soon
- Patron receives a pickup notice for an item not yet on the holdshelf

**Patrons receive recall notices, but the items don't have holds on them**
**Cause:** If a hold with recall is placed, the system will generate a recall notice even if the hold is cancelled before the notice is sent. This happens because, in most cases, the due date of the item is changed when the recall is placed, and the system has no way of reversing this change to reinstate the original due date. In this case, your library should generate a recall notice for the patron who has the item checked out so that the patron is informed of the changed due date.
**Resolution:** No resolution required

**Overdue notices or bills not generated when expected**
**Cause:** The library was closed for a holiday or for another reason days or weeks before. As a result, no items circulated that would generate a first overdue today.
**Resolution:** No resolution required. Library staff may consult the Days Closed table to see what dates the library was closed to verify whether a library closure is the cause behind an unexpectedly small notices job.

**Cause:** The notice **Time to** elements indicate time from the previous notice, except for Time to 1st ODUE, where the number represents time from the due date. For example, at one library, first overdues go out at 7 days and the second notice (bill) goes out at 14 days. The bill will not print until 14 days after the first overdue notice was printed.

**Resolution:** Most libraries need to print notices each day in order to keep the cycle moving along properly.  The Auto Notices feature can make this easier by sending notices every day without manual intervention.

**Cause:** The loan rule does not have a message text number for all levels of overdue notices (or overdue recall notices, if the item is recalled) that are used by the loan rule, or the loan rule does not have a message text number for the bill message element.

**Resolution:** Add a text number to all overdue notice levels and to the bill message element in the loan rule. For example, if **Max Number Of Odues** is set to 3, your library must enter a value into **Text First Odue**, **Text Second Odue**, and **Msg Bill**. Even if recalls are not generally permitted, the system may generate a recall in some cases, so also set **Text First OdueR** etc. and **Time 1st Odue Recall** for all loan rules.

**Cause:** Staff did not prepare the last level of overdue notices.

**Resolution:** Prepare the last level of overdue notices in order to bill items. For example, if Max Number Of Odues is set to 3, the library must prepare level 3 overdue notices in order for items to be billed. This step does not send notices, but it updates the patron and item records and queues a bill notice to send. Staff can then prepare and send the bill notices.

**Cause:** If items with a specific location code are not receiving overdue notices, staff may not be preparing overdue notices for that location code. This commonly happens if the library prints overdue notices by Locations Served and has added a new location code but has not updated the appropriate Locations Served table with the code.

**Resolution:** Verify that the specific location code belongs to a Locations Served and that your library is preparing and printing notices for that Locations Served or verify that your library is preparing and printing notices for "All" locations.

**Cause:** If items that have been marked missing or claimed returned are not receiving overdue notices, staff may not be preparing overdue notices for missing or claims returned items.

**Resolution:** Verify the setting for the Overdue Status option in saved notice job parameters. If overdue notices should be sent for missing and claims returned items, set Overdue Status to "All Overdue Items."

**Cause:** Your library has the Collection Agency product and has opted not to send overdue notices for patrons who have the Collection Agency Report value assigned to their Manual Block (MBLOCK) fields. If the library configures the system not to send overdue notices to patrons in collection, they will receive no overdue notices for their checked-out items, as well as no bills for the items.

**Resolution:** No resolution necessary; however, if you would like to change your library's configuration for sending overdues and generating bills for patrons in collection, contact Support.

**Cause:** The patron record has accumulated the maximum number of fines that can be outstanding for a single patron. Once this limit is reached, the system is not able to add a new charge to the patron record.

**Resolution:** Remove one or more outstanding fines so that the system can add a bill to the patron's record.

**Cause:** The patron has an invalid Manual Block (MBLOCK) value.
**Resolution:** Make sure all patron records have valid values for Manual Block. If the patron is not blocked, the MBLOCK fixed-length field should contain a "no block" value, usually a hyphen ("-").

**Checked-out item appears on an item paging slip or item paging list**
**Cause:** The hold was placed while the item was available and pageable, and then the item was checked out to a different patron while on hold. Because the item was already paged, the page will print, even though the item has been circulated.
**Resolution:** No resolution is required. Staff may view circulation overrides to see the details of the overridden hold.

**When preparing statements of checked out items, the word "Error" appears in the Circulation Text drop-down box.**
**Cause:** Only notice texts whose Notice Type label starts with the phrase 'checked out' appear in this drop-down box, and no such entry is defined in the text of circulation notices table.
**Resolution:** Edit the Text of Circulation Notices table and add or update an entry with a notice type that starts with 'checked out'. See Text of Circulation Notices Table .

**Error "Failed to initialize notices sending" when preparing notices.**
**Cause:** A printer must be selected when preparing notices, even if all notices are to be sent by email or the library does not want to print notices.
**Resolution:** Go to File | Select Printer | Form printer. Select a printer and click OK (even if it appears that a valid printer has been selected already). Prepare notices again. If this does not work, restart the Sierra Desktop Application.

**Courtesy notices are not being sent as auto notices.**
**Cause:** Courtesy notices are not set up on your system.
**Resolution:** Contact Support to request that courtesy notices be enabled.

**Cause:** Your organization has not created or saved an auto notices job for courtesy notices.
**Resolution:** Select and save notice parameters for courtesy notices. See Saving Notice Parameters and Selecting Notice Parameters. Make sure to check "Enabled" and uncheck "Move all to print" in the Auto Notices pane.

**Cause:** Loan rule parameters for courtesy notices are not properly configured.
**Resolution:** Make sure the notice texts and loan rule elements are properly configured as described in Setting Up Courtesy Notices.

**Staff created and saved a notices job but cannot see it in the saved notices table.**

**Cause:** The staff member is using a login with a locations served, and the notice job was for a different locations served, for all locations, or for a specific item location outside the login's locations served. Unless the Notices Administrator Feature is enabled, these jobs are not visible in the saved notices table.
**Resolution:** Contact Support to Enable the Notices Administrator feature.

**After preparing and sending notices, some notices display in the Items Not Sent tab with the error message "Text number is 0".**
**Cause:** An item is eligible for this type of notice, but the parameter that specifies which text should be used for this notice is not set.
**Resolution:** Check the loan rule under which the item is checked out to make sure each of these elements is set:
Msg Fines
Msg Bill
Msg Adjustment
Check the following circulation options to verify they are assigned a text number:
Fines/Bills: Text # for bill for lost book
Fines/Bills: text # for bill for charge adjustment
Statements: Text #
Pageslips: Text #
Manual Charge: Text #

**Patrons are not receiving emailed notices.**
**Cause:** Library staff are not sending and clearing all types of notices for all locations and all levels.
**Resolution:** Check with circulation staff regarding their workflow for sending each type of notice. If auto notices are used exclusively, check auto notice jobs to make sure that the jobs cover all notice types, all locations, and all overdue levels. If notices are sent by locations served rather than for all locations, check each locations served entry to make sure that all location codes are included.

**Cause:** The patron's email address is incorrect.
**Resolution:** Check bounced email notices to see if the notice bounced and forward or print it as needed. Correct or delete the email address in the patron record.

**Cause:** The patron's email client regards the notice as spam.
**Resolution:** Try the following steps to determine whether the patron's spam filter might be responsible:
- Ask the patron to check personal email SPAM filters.
- Ask if the patron whitelisted your library's email address.
- If the patron directs the notices to an email address where spam filtering may be especially rigorous, and the patron cannot whitelist your library's email address, the patron should try using a different email address for library email.
- Library staff can view the Notice History, if enabled. Use this history to determine whether a batch of notices was sent successfully.

- If the issue is widespread, you can add a "CC" address to the Notices: E-mail notice information circulation system option so that staff have a record of the actual notices sent to customers. Staff can view the CC'd email to see if a patron's notice appears.
- To determine if the issue might be related to an ISP spam filter, temporarily insert a staff non-library email address into the patron's record and generate a notice. (You can send a statement of checked out items for testing or wait until a notice is due.) If the staff member receives the notice, then the ISP is the cause of the problem. Note that the library's own spam filters may complicate the issue.
- Some spam filters look for specific phrases or terms. For example, an overdue notice for "The eBay survival guide: how to make money and avoid losing your shirt" might be filtered based on the phrase "how to make money".

**Overdue notices or bills sent too soon.**
**Cause:** If an item is checked in while a courtesy notice is being sent for that item, the checked-in item will be left with ODUE DATE and # OVERDUE fields populated. When the item is next checked out, if that patron lets the item become overdue, the first notice received will be the next level of notice after the first level. Because one overdue notice has been skipped, the item will be billed early.
**Resolution:** Avoid checking in items while sending courtesy notices. Innovative recommends using courtesy notices in conjunction with Auto Notices, so that notices can be sent at a time when the system is not checking in items, such as when the library is closed. For more information, see Managing Auto Notices.
If your library has items that are not checked out but have ODUE DATE and # OVERDUE set to values other than 'blank' and '0' respectively, contact Support and ask to repair broken checkout links to have these items corrected.

**Patron receives a pickup notice for an item not yet on the holdshelf**
**Cause:** Staff checked in an item and put it on the holdshelf for this patron, but the item was subsequently checked in again and put in transit. One way in which this can occur is via a staff member's checking in the item with a login whose location served does not include the pickup location where the item is currently on holdshelf. While the item is now in transit, the patron record will display the hold as "on holdshelf".
**Resolution:** Staff can wait for the hold to arrive back at the pickup location and be checked in and placed on the holdshelf again. The patron will not receive another pickup notice. Or staff can cancel and re-place the hold, moving it to the top of the queue. The new hold will be activated when an item is checked in to fill it, and the patron will receive a pickup notice.

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