INFOhio
OHIO'S PreK-12 DIGITAL LIBRARY

How to set up Incremental Overdue Notices
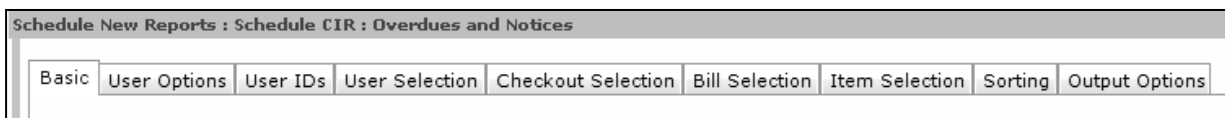## (using the INFOhio ciroverlist report)

Using these suggested settings allows the report to create weekly overdue notices for items that became overdue during the specified date range. This report differs from other overdue notice reports because a range of overdue dates can be selected so that a specific type of overdue notice (First notice, Second notice, and Final Notice) can be generated weekly based on the number of days overdue.

Setting up the Report (*you will set up 3 reports – 1st notice, 2nd notice, Final notice*)

After creating the 1st notice, *save as TEMPLATE.* You will COPY the 1st notice template and MODIFY specific settings for a 2nd notice and again for a Final notice

1. *Click* Schedule New Reports wizard.
2. *Select* the INFOhio tab
3. *Select* CIR: Overdues and Notices.
4. *Click* Setup & Schedule.

Selections / Options

Schedule New Reports : Schedule CIR : Overdues and Notices

Basic | User Options | User IDs | User Selection | Checkout Selection | Bill Selection | Item Selection | Sorting | Output Options

*These first settings are for 3 reports run every **Monday**. Following are settings for 3 reports run every **Wednesday**. If you wish the report to be run on a different day of the week, you will need to adjust the date-range selections as appropriate.*

Settings for 1st notice report – runs every Monday

Basic Information Tab

1. *Change* the Report name and/or Title. It should reflect the content of the report.
2. *Description* set to describe specifics about this report.
3. *Title* appears on each page.
4. *Footer* appears at the bottom of each page (optional)

Basic | User Options | User IDs | User Selection | Checkout Selection | Bill

Report name: VT 1st notice 2/page
Description: Overdue notice - due within last week (M-F) run Mon
Title: Overdue notice - due within last week (M-F) run Mon
Footer: VTVS

User Options, User ID's, User Selection, Checkout Selection, Bill Selection Tabs

1. **User Options** – Default will suffice
2. **User Ids** – Default will suffice.
3. **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported. Leave a check in the box for: blank field matches with Not Equal qualifier.

Basic | User Options | User IDs | User Selection | Checko

Library: VTVS
User profile:
Grade:
Gender:
Teacher:
Extended info: **3**
☑ blank field matches with Not Equal qu

4. **Checkout Selection –** limits output to a specific library, date or date range. For the first notice, this date due range is listed to collect all overdues from today (the date the report is run) back to the last 9 days (which collects all overdues within the last 9 days – ie: week previous).

   NOTE: *Always use the gadget* ⊕ *to make calendar selections, to ensure correct formatting of data.*

   ④

   Basic | User Options | User IDs | User Selection | Checkout Selection | Bill

   Library: VTVS ⊕
   Date checked out: ⊕
   Date due: D-9:D0 ⊕
   Overdue: ⦿ Yes ◯ No ◯ Both
   Number of unseen renewals: ⊕

   Gadget : Date Range

   Use data for dates within a period starting from 9 days before the report run date ending the date this report will be run.

   Start date
   ◯ Since the beginning of the system
   ◯ The date this report will be run
   ⦿ Before
   ◯ After
   9 ▲▼ Days ▼

   End date
   ◯ No ending date
   ⦿ The date this report will be run
   ◯ Before
   ◯ After
   1 Days

   OK Cancel

5. **Bill Selection** – limits output to a specific library, date or date range. For the first notice, this date billed range is listed to collect all bills (fines or fees) from today (the date the report is run) back to the last 9 days (which collects all bills within the last 9 days – ie: week previous). Selecting NO library will report bills owed at any library by patron.

   NOTE: *As noted above, (and pictured), always use the gadget* ⊕ *to make calendar selections, to ensure correct formatting of data.*

   Basic | User Options | User IDs | User Selection | Checkout Selection | Bill Selectio

   Library: ⊕
   Date billed: D-9:D0 ⊕
   Amount billed: ⊕   ⑤
   Bill paid in full: ◯ Yes ⦿ No ◯ Both
   Date checked out: ⊕

6. **Item Selection** – Defaults suffice

7. **Sorting** – *Select* sort from drop-down menu and select your sorting preference. (Example: Library/room/name will sort by homeroom, last name.)

| Basic | User Options | User IDs | User Selection | Checkout Selection | Bill Selection | Item Selection | Sorting |

Sorted by: library/ room/ name ▼ ⑦

8. **Output Options -** For best results (2 notices per page) use following settings:

| Basic | User Options | User IDs | User Selection | Checkout Selection | Bill Selection | Item Selection | Sorting | Output |

Report Type

○ Brief ○ Long ⦿ Notices ○ Spreadsheet

Report Format

○ Plain Text ⦿ RTF
⦿ Portrait ○ Landscape
⦿ Normal ○ Condensed

General Options

☑ Overdues   ☑ Unpaid Bills
☑ HIDE Inactive Transactions   ☐ Total Bills and Charges
☐ HIDE Active Transactions   ☐ Total Book Values
☑ HIDE Historical Transactions   ☐ Show Lost Items
☐ Start New Page on Sort Key   ☑ Two Notices per Page
☐ Show default Late Fee/Fine Message

Print Options

⦿ PC ○ Mac

Message (Notices and Long Report)

FIRST NOTICE   The following library materials are overdue.
Please return them or renew them as soon as possible. Thank you.

Field Selection

☑ Item: Title	☑ Date: Checkout	☑ Patron: Room
☑ Item: Barcode Number	☑ Date: Returned	☐ Patron: Teacher
☑ Item: Callnum	☑ Date: Due	☐ Patron: Program
☑ Item: Author	☑ Date: Notice Date	☐ Patron: Grade
☐ Item: Estimated Fines	☑ Patron: Name	☑ Patron: Address
☐ Item: Price	☑ Patron: Barcode	☐ Patron: Homeschool

Email Notices

Subject Line (Default: Library Notice):
[   ]

From Address (Default: Sirsi@servername):
[Y   ]

☐ Email notices to all patrons with valid email accounts

☐ Report invalid email addresses in report log

Spreadsheet Delimiter

⦿ Comma ○ Tab ○ Pipe ○ Other: [   ]

NOTE: *If you charge overdue fines, you may want to select "Item: Estimated Fines" and "Show default Late Fee/Fine message".*

NOTE: *If you wish to have the item "replacement cost" listed on the notice, select "Item: Price".*

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Settings for 2nd notice report – runs every Monday

All selections should be the same as 1st notice, except for the following:

Basic Information Tab:

1. *Change* the Report name and/or Title. It should reflect the content of the report.
2. *Description* set to describe specifics about this report.
3. *Title* appears on each page.
4. *Footer* appears at the bottom of each page (optional)

Basic	User Options	User IDs	User Selection	Checkout Selection	Bill Selection	It

Report name: VT 2nd notice 2/page
Description: Overdue notice - due one week ago (M-F) run Mon
Title: Overdue notice - due within last week (M-F) run Mon
Footer: VTVS

User Options, User ID's, User Selection, Checkout Selection, Bill Selection Tabs

1. **User Options** – Same
2. **User Ids** – Same
3. **User Selection** – Same
4. **Checkout Selection –** For the second notice, this date due range is listed to collect all overdues beginning 16 days before today (the date the report is run) ending 9 days before today (which collects all overdues within the week previous).

Gadget : Date Range

④

Use data for dates within a period starting from 16 days before the report run date ending 9 days before the report run date.

Start date
○ Since the beginning of the system
○ The date this report will be run
● Before
○ After
16 [▲][▼] Days ▼

End date
○ No ending date
○ The date this report will be run
● Before
○ After
9 [▲][▼] Days ▼

Basic	User Options	User IDs	User Selection	Checkout Selection	Bill Selection

Library: VTVS ⊛
Date checked out: ⊛
Date due: D-16:D-9 ⊛
Overdue: ● Yes ○ No ○ Both
ber of unseen renewals: ⊛

5. **Bill Selection** – For the second notice, this date billed range is listed to collect all bills beginning 16 days before today (the date the report is run) ending 9 days before today (which collects all bills within the week previous).

6. **Item Selection** – Same
7. **Sorting** – Same
8. **Output Options -** Same (except for Message)

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Settings for <u>FINAL notice report</u> – runs every Monday

All selections should be the same as 1st notice, <u>except</u> for the following:

Basic Information Tab:

1. *Change* the Report name and/or Title. It should reflect the content of the report.
2. *Description* set to describe specifics about this report
3. *Title* appears on each page.
4. *Footer* appears at the bottom of each page (optional)

User Options, User ID's, User Selection, Checkout Selection, Bill Selection Tabs

1. **User Options** – Same
2. **User Ids** – Same
3. **User Selection** – Same

4. **Checkout Selection –** For the final notice, this date due range is listed to collect all overdues from the "beginning", ending 17 days before today (date report is run) - (which collects all overdues that are over two weeks overdue).

5. **Bill Selection** – For the final notice, this date billed range is listed to collect all bills from the "beginning", ending 17 days before today (date report is run) - (which collects all bills within the week previous).

6. **Item Selection** – Same
7. **Sorting** – Same
8. **Output Options -** Same (except for Message – select "Item: Price" if you want replacement cost to be listed in notice)

Settings for Incremental Notices to be run on Wednesdays:

1st Notice:

Basic | User Options | User IDs | User Selection | Checkout Selection | Bill S

Report name: AD 1st notice
Description: Overdue notice - due within last week (M-F) (run Wed)
Title: Overdue notice - due within last week (M-F) (run Wed)
Footer:

Gadget : Date Range

Use data for dates within a period starting from the report run date ending 5 days before the re

Start date
○ Since the beginning of the system
○ The date this report will be run
● Before
○ After
9 ▲▼ Days

End date
○ No ending date
○ The date this report will be run
● Before
○ After
5 ▲▼ Days

OK | Cancel

Basic | User Options | User IDs | User Selection | **Checkout Selection** | Bill Sele

Library: ADEL|ADHS|DISTRICT ⊛
Date checked out: ⊛
Date due: D-9:D-5 ⊛
Overdue: ● Yes ○ No ○ Both
Number of unseen renewals: ⊛

Basic | User Options | User IDs | User Selection | Checkout Selection | **Bill Selection**

Library: ⊛
Date billed: ⊛
Amount billed: D-9:D-5 ⊛
Bill paid in full: ○ Yes ● No ○ Both
Date checked out: ⊛

2nd Notice:

Basic | User Options | User IDs | User Selection | Checkout Selection | Bill Selection | It

Report name: AD 2nd notice
Description: Overdue notice - due one week ago (M-F) (run Wed)
Title: Overdue notice - due one week ago (M-F) (run Wed)
Footer:

Gadget : Date Range

Use data for dates within a period starting from 16 days before the report run date ending 12 days before the report run date.

Start date
○ Since the beginning of the system
○ The date this report will be run
● Before
○ After
16 ▲▼ Days

End date
○ No ending date
○ The date this report will be run
● Before
○ After
12 ▲▼ Days

OK | Cancel

Basic | User Options | User IDs | User Selection | **Checkout Selection** | Bi

Library: ADEL|ADHS|DISTRICT ⊛
Date checked out: ⊛
Date due: D-16:D-12 ⊛
Overdue: ● Yes ○ No ○ Both
Number of unseen renewals: ⊛

Basic | User Options | User IDs | User Selection | Checkout Selection | **Bill Selection**

Library: ⊛
Date billed: D-16:D-12 ⊛
Amount billed: ⊛
Bill paid in full: ○ Yes ● No ○ Both
Date checked out: ⊛

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Final Notice:

Basic | User Options | User IDs | User Selection | Checkout Selection | Bill

Report name: AD 3rd notice BILL
Description: Overdue notice - due before 2 weeks ago (run Wed)
Title: Overdue notice - due before 2 weeks ago (run Wed)
Footer:

Gadget : Date Range

Use data for dates within a period starting from the beginning
of the system ending 19 days before the report run date.

Start date
- ● Since the beginning of the system
- ○ The date this report will be run
- ○ Before
- ○ After

[1] Days

End date
- ○ No ending date
- ○ The date this report will be run
- ● Before
- ○ After

[19] Days

OK   Cancel

Basic | User Options | User IDs | User Selection | Checkout Selection | B

Library: ADEL|ADHS|DISTRICT
Date checked out:
Date due: :D-19
Overdue: ● Yes ○ No ○ Both
Number of unseen renewals:

Basic | User Options | User IDs | User Selection | Checkout Selection | Bill Selection

Library:
Date billed: :D-19
Amount billed:
Bill paid in full: ○ Yes ● No ○ Both
Date checked out: