



Weeding Fees IGeLU 2010

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Introduction

- HELKA library system
- Problem
- Solution
- Production Batch Runs
- State of affairs after



HELKA Library System

- Voyager 6.2.1 at the time (now 7.2.1)
- Helsinki University Library, 20 locations
- Research collection of National Library of Finland
- 5 non-university special libraries



Fees start to expire

- 2004: Act on Time-Barring of Debt
 - Debt expires in 3 yrs
 - unless reminded
 - After reminding a new 3 yr expiration period
 - Unclear legal status of library fees
- 2009 resolution: library fees expire accordingly



The Problem

- **Helka 2009 after the resolution**
 - Ca. 11 years worth of expired fees (from 1996!)
 - More fees were expiring every day
 - Confusion at customer service
- **How to solve**
 - Expired fees forgiven
 - Patrons with unpaid non-expired reminded about their fees to restart the 3 yr count-down to the expiration



Forgiving expired fees

- **Voyager 6.2.1**
 - Circjobs 40, 41 not available to forgive fees by patron id or create date
- **Used bursar transfer job, Pbursar**
 - Not run for its intended use in HELKA
 - Settings: all locations, all patron groups, interval of 1095 (3x365) days, operator id EXPIREDFEE
- **Autohotkey macros**
 - Pbursar cannot forgive fees if patron has no active barcode or institution id



Patrons included

- After some consideration, the criteria to send a reminding letter to a patron was defined
- Patron has unpaid fees which are
 - Less than 3 years old
 - More than 1 year old
 - Totaling over 1 euro
- For these patrons, all fines included
 - Also those less than 1 year old



Statement generation

- A computer program HEMULI was developed (Python 2.4.4) to produce fee statement files
 - As e-mail or
 - In a specific electronic format for paper letters
- Text templates in Finnish, Swedish, English
- Not used: Voyager's fee statement reporting functionality (circjob 14 and Reporter)
 - Complexity of the fee/patron selection criteria
 - Required format of the output



Sending of statements

- HEMULI Statement files were manually transferred to another server already set up for sending daily library notices
- Modified the existing system to also handle the expired-fee-notices
- Statements sent
 - As e-mail notice if possible
 - As a paper letter (iPost: transfer data in a certain electronic format to mail service, where letters were printed, enveloped, distributed)
- Bounced mail sent again later



Statement batches

- Statements generated and sent in batches (A, B, C, ...)
- Unique statement id for each letter
 - For controlling re-sending if patron not reached
 - Id was included in the email subject field and the envelope window of the paper letters
 - file for statement ids -> patron id lookups maintained by HEMULI



Batch A: e-mails

- All eligible patrons with e-mail address
 - University e-mail addresses checked against University LDAP service. If no match, e-mail address was deleted from Voyager patron record (->notice sent in batch B as a paper letter instead)
- Bounced email statements
 - Sorted by library staff into subfolders
 - Subfolder for unknown recipients scanned with a Python script to extract the statement ids from the subject headers to be included in a re-send batch
 - Invalid email address was deleted from Voyager patron record before re-send



Batch B: Paper letters

- Eligible patrons with no email
- Bounces
 - A librarian looked for the patron's current address (student register, district registry office...)
 - cost-benefit evaluation: some fees forgiven
 - If found
 - Updated Voyager patron record
 - Added statement id to a re-send list for next batch
 - No need to open the letter, as statement id visible on the envelope



Batches C-F: re-sends

- Included
 - Bounced emails from batch A
 - Return-to-sender letters from other previous batches
- Generated by HEMULI, parameters:
 - Re-send list of statement ids
 - Statement id -> patron id lookup file
- Easier to generate new HEMULI-batches than to re-envelope/re-address the returned mail



Summary of notices

BATCH	STATEMENTS SENT	DATE	NB
A	7156	20.4.2010	Sent as emails
B	2518	20.4.2010	
C	685	22.4.2010	
D	180	26.4.2010	
E	101	30.4.2010	
F	78	12.5.2010	



Conclusion

- HELKA – a large and complex Voyager implementation in Finland
- Legally expired fees removed from the system
- Annual notices to avoid further credit loss



Thank you! Questions?

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