

# Producing BFR (final notice) with the Assumed Lost Report

This report works much in the same way as the old DRA BFR. When the report is run, items that match the overdue selection criteria remain charged to the patron and the item's location is changed to LOST-ASSUM.

The report will automatically add a bill to the patron record for the cost of the item, updating the users estimated fines. The replacement cost is either the price of the item, or can be derived from the Default Price policy. The Default Price policy sets the default price for an item by item type and library. The Default Price policy lets you determine if a processing fee is added to the patron's account and if the processing fee is automatically removed with the lost bill when the lost item is returned to the library. This policy also lets you determine if the default replacement cost is always used instead of the price set in the item record. If the default replacement cost is not always used, the report will first check for a price in the item record, and, if one does not exist, will use the value set in the Default Price policy. To view and request changes to your Default price policies use the circmap pages at <http://wyld.state.wy.us/map>, select your library then "Your Library's Default Price Policies".

The assumed lost item processing is the same as when a user claims to have lost material, as defined in the FAQs: Marking Items as Lost. The user's charge becomes inactive and the overdue charge is no longer accrued in the user's estimated fines. The FAQ describes what happens when a patron pays a lost item bill, what happens if the item is returned or found before the patron pays the lost item bill, and how library staff can issue a refund for a lost item bill.

## Default Price policy

You do not have to set up Default Price policies for this report to work. But you do if you:

1. Want to charge a Processing fee
2. Want to charge a Lost fee and your item records do not have prices in them

Go to the WYLD circ map home page and select your library to find a link to the Default price policies spreadsheet.

## Creating an Assumed Lost template

Premise: We will assume you are replacing your final notice with this report, your present notice report creates a first notice at 7 days overdue, a second notice at 14 days overdue and a final notice at 21 days overdue.

- Find the circulation group of reports, select the Assumed lost report and click "setup & Schedule"
- Change the report name to something like "[YOUR LIBRARY CODE] Final Notice"
- Click on the "Selection Criteria" tab, you will not see a field for selecting your library, it has been selected automatically
- Notice that the "Current location" is set to CHECKEDOUT, in general you will never want to change this
- In Setting the template up to work like a Final notice or BFR notice we will concentrate on the "Date due" field, the default is set to find all items due 45 days before the date the report is run.

- To change this to match the production of your final notice click on the gadget next to the "Date due" field
- The date range window comes up, the first screen says that you are using a start date from the beginning of the system
- Click the "Next" button and change the "45" to "21", click "Ok" then "Ok"
- When you run this report it will find all items that are at least 21 days overdue and process them as described above
- The selection criteria allow you to limit processing by User profile and User status. If you are limiting your notices by User profile you may select it here.
  - As a reminder, if you do limit by profile you will never ever send a notice to a patron who uses another library's card in your library
- Click the "Sorting criteria" tab and select your preferred sorting
- Click the "Output options" tab
- You will probably want to run the report in test mode first to see what patrons/items it will find and what the format will look like, when ready to run the report for real you will want to change the "Update database records" from No to Yes
- Optionally select:
  - if you do not want the library address to show on the notice
  - if you do not want the salutation on the notice
  - if you do want the users barcode (user Id) on the notice
  - if you do want the users group Id on the notice
- Click the gadget next to the "Message 1" field, click the black down arrow and locate your Library's final notice file. e.g. 13\_final, then click "Ok"
- Under the "Price and fine information" section decide how much information to include on the notice.
- Finally, under the "User options" decide whether to mark the patron as "BARRED"
- Now, click the "Save as template" button

## Modify your daily notice file

- Go to your templates and find your daily notice file
- Select it and click " modify
- In our example it would look like this image

Count as a notice sent  
 Combine Notices  
 ry:   
 ss:  Primary  Address 1  Address 2  Address 3  
 Salutation on notice  
 User ID on notice

Message 1:   Date:   
 Message 2:   Date:   
 Message 3:   Date:   
 Message 4:   Date:   
 Message 5:   Date:

- clear out the text in the "Message 3" field, including the date data
- Click "Ok" to save this, do not click "Run now"

## **Remove and reschedule your Daily notices**

- Click the "Scheduled reports list" wizard (the one in the middle with the numbers on it)
- Find and select the scheduled notice file that we just edited and click "Remove"
- Go back to your "Setup and Schedule new reports" wizard and select the notice file that we edited and click "Setup and Schedule"
- Click the "Schedule" button
- Click the "Daily" button, click the gadget next to the "Date and time of next run" field
- Select the next day and change the time to 06:00 and click "OK", this is the hour that all daily notices start
- If you send e-mail notices to your patrons, check the "Auto email to recipients with email addresses in their patron record" box
- In the "Reply to:" field enter a valid email address for your library, failure to do this causes any bounced or replied to messages to go to the WYLD staff
- Click "Ok" to schedule this report

## **Schedule your new Assumed lost report**

- At your templates list select the template for assumed lost and click the "Setup & Schedule" button
- Click the "Schedule" button
- Click the "Daily" button, click the gadget next to the "Date and time of next run" field
- Select the next day and change the time to 06:30 and click "OK", this is the hour that all final notices start
- If you send e-mail notices to your patrons, check the "Auto email to recipients with email addresses in their patron record" box
- In the "Reply to:" field enter a valid email address for your library, failure to do this causes any bounced or replied to messages to go to the WYLD staff
- Click "Ok" to schedule this report

For an additional step in dealing with overdue material see the Long overdue report.  
[LongOverdueProcessing.pdf](#)