How to replicate CIRC-1141 – In detail

When I log into Snapshot 2:

**A] Set-up**

01] Switch the service point to: Circ Desk 1 (i.e. the main service point for the location of the items you will test with)

02] Settings >> Inventory >> Loan types >> + New >> Julie's loan type

03] Settings >> Circulation >> Title level requests >> Allow title level requests = Active

04] Settings >> Circulation >> Patron notice templates >> + New >>

\_ Patron notice template name = Julie's Awaiting pickup

\_ Category = Request

\_ Subject = Julie's Awaiting pickup | {{item.barcode}}

\_ Body = {{user.firstName}} / {{item.barcode}}

>> Save & close

05] Settings >> Circulation >> Patron notice policies >> + New >>

\_ Patron notice policy name = Julie's notice policy

\_ Active = Active

\_ Request notices - sent to requester >> Add notice >>

--- Template = Julie's Awaiting pickup

--- Format = Email

--- Triggering event = Awaiting pickup

>> Save & close

06] Settings >> Circulation >> Circulation rules >>

\_ t julies-loan-type: l one-hour r allow-all n julies-notice-policy o overdue-fine-policy i lost-item-fee-policy

>> Save

07] Inventory >> Search Instance Keyword = \* >> (Select an instance, e.g.) Water resources >> Add holdings >>

\_ Location >> Holdings location >> Permanent = Main Library (KU/CC/DI/M)

>> Save & Close >> Holdings: Main Library >> Add item >>

\_ Barcode = Ju01

\_ Material type = book

\_ Permanent loan type = Julie's loan type

>> Save & Close

08] Users >> User search = Inactive + undergrad >> (Select an inactive user) >> Actions >> Edit >>

\_ (Save the barcode somewhere you can easily copy it - this is now your User 1) (My example = barcode = 745758690367580)

\_ (Remember what the first name is - this is now your User 1)

\_ Expiration date = in the future

\_ Email = (your email address)

\_ Preferred contact = Email

>> Save & close

09] Users >> User search = Inactive + undergrad >> (Select an inactive user) >> Actions >> Edit >>

\_ (Save the barcode somewhere you can easily copy it - this is now your User 2) (My example = barcode = 997383903573496)

\_ (Remember what the first name is - this is now your User 2)

\_ Expiration date = in the future

\_ Email = (your email address)

\_ Preferred contact = Email

>> Save & close

**B] Actions**

10] Requests >> Actions >> New >>

\_ Item barcode = Ju01 >> Enter >> (Request type = Page - this happens automatically)

\_ Requester barcode = (User 1) >> Enter >>

\_ Pickup service point = Circ Desk 1

>> Save & close >> Actions >> Duplicate >> (Check Item barcode = Ju01) >>

\_ Request type = Hold

\_ Requester barcode = (User 2) >> Enter >>

\_ Pickup service point = Circ Desk 1

>> Save & close

11] Check in >> Barcode = Ju01 >> Enter >> (Close the window by clicking on) X >> End session

12] I get an email:



13] Requests >> Request status = Open – Awaiting pickup + Open- Not yet filled >> (Select the page request for User 1 by clicking on the title) >> Actions >> Cancel request >> Confirm

14] Requests >> Actions >> Export hold shelf clearance report for Circ Desk 1.

15] Retrieve items off of the hold shelf that need to be cleared

16] Checkin >> Barcode = Ju01 >> Enter >> (Close the window by clicking on) X >> End session

17] I get an email:



~~14] Refresh the page >> (Select the page request for User 2 by clicking on the title).~~

~~I notice that: The item status has indeed updated to Awaiting pickup…~~

~~… but the request status has stayed at Open – Not yet filled.~~

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~~15] … I get no email~~

~~16] Circulation log >> User barcode = (User 1) >> Apply >>~~

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~~(Refresh the page if the entries are listed twice, this is another UI issue I want to submit at some point)~~

~~17] Circulation log >> User barcode = (User 2) >> Apply >>~~

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~~… no notice was generated.~~

**C] To reset your test items, so you can test again:**

18] Requests >> Request status = Open - Awaiting pickup + Open- Not yet filled >> (Select the second request by clicking on the title) >> Actions >> Cancel request >> Confirm

19] Check in >> Barcode = Ju01 >> Enter >> End session