Edit and send notifications

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Edit email and SMS notifications

Every notification has a default template. You should customize each notification with your library's information in order for your patrons to recognize the notification is coming from your library. On the Edit screen for a notification, you can edit the email and SMS message templates.

Edit email notification template

Follow the instructions below to edit an email notification template.

To edit an email notification:

1. In Service Configuration, on the left navigation, click WorldShare ILL > Notifications.
2. On the Notifications screen, find the notification you want to edit. See Notification types for more information on the different notifications you can send.
3. In the row of the notification, click **Edit**.
4. On the Edit screen, edit the fields. Refer to **Email fields** below for more information.
5. To represent information from the request, use Data Inserts. Place your cursor where you want to add the Data Insert, and click the **Data Insert** you want to add. For descriptions of all the Data Inserts, see **Notification data inserts**.
6. At the bottom of the screen, click **Save All Changes**.
7. If you are unhappy with your edits, you can revert to the default template at any time by clicking **Reset to Standard**. Note: This will revert both the email and SMS notification (if applicable).

**To create a custom email notification:**

1. In **Service Configuration**, on the left navigation, click **WorldShare ILL > Notifications**.
2. Open the **Custom** accordion and click "Create New Custom Notification".
3. In the Create New Template window, type a Template Name.
4. (Optional). Add a description of the template in the Template Description text box.
5. Select a Recipient type.
6. Click **Create**.
7. The new template will now display below the Custom category and can be edited.

**Email fields**

You can edit the following fields for email notifications:

<table>
<thead>
<tr>
<th>EMAIL FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Name</td>
<td>The sender of the email notification. You should enter your library's name, department, or service name (e.g. Bobcat Document Delivery) in this field. You do not have to use the same From Name on each notification. For example, you can use a different from name on your interlibrary loan request notifications than your Document Delivery notifications.</td>
</tr>
<tr>
<td><strong>EMAIL FIELD</strong></td>
<td><strong>DESCRIPTION</strong></td>
</tr>
<tr>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Reply To Email</td>
<td>The email address patrons can reply to if they have any questions about their request or need more information. The OCLC-supplied email in the templates is not a monitored email. If you leave the default OCLC email in the Reply To Email field, patrons that reply to that email will not receive a response. If you want patrons to be able to email your library and receive responses, you should enter a monitored email for your library.</td>
</tr>
</tbody>
</table>

**OCLC-supplied email address information**

<table>
<thead>
<tr>
<th>DATA CENTER</th>
<th>OCLC-SUPPLIED EMAIL ADDRESS</th>
<th>IP ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States Data Center</td>
<td><a href="mailto:notices@e.worldcat.org">notices@e.worldcat.org</a></td>
<td>129.33.239.222</td>
</tr>
<tr>
<td>Australia Data Centre</td>
<td><a href="mailto:notices@e2.worldcat.org">notices@e2.worldcat.org</a></td>
<td>208.73.7.73</td>
</tr>
<tr>
<td>Canada Data Centre</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Europe Data Centre</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Message Subject**
The subject of the email notification.

**Message Body**
The body of the email notification.

**How an email appears to your patrons**
The following image depicts how an email notification will appear to patrons:
Edit SMS notification

Follow the instructions below to edit an SMS notification template. **Note:** Only automated notifications have SMS as an option.

To abide by international privacy law, all notifications will have an opt out message included.

**SMS**

Your request for "${Title20!}" is ready. More about this item at ${LinkUserPortal!}. (Request ID ${RequestID!})

To reset this template to the standard template, click the **Reset to Standard** button. To cancel all changes, click **Cancel All Changes**. To save the changes, click **Save All Changes**.
To edit an SMS notification:

1. In Service Configuration, on the left navigation, click WorldShare ILL > Notifications.
2. On the Notifications screen, find the notification you want to edit. See Notification types for more information on the different notifications you can send.
3. In the row of the notification, click Edit.
4. On the Edit screen, scroll down to the SMS field.
5. Edit the text in the SMS field. OCLC recommends limiting the notification to 160 characters and including the Request ID data insert in the message.
6. To represent information from the request, use Data Inserts. Place your cursor where you want to add the Data Insert, and click the Data Insert you want to add. For descriptions of all the Data Inserts, see Notification data inserts.
7. At the bottom of the screen, click Save All Changes.
8. If you are unhappy with your edits, you can revert to the default template at any time by clicking Reset to Standard. Note: This will revert both the email and SMS notification (if applicable).

Preview your edits

You can preview your edits from the Notifications screen. When you preview a notification, it will show you both the email version and the SMS version.

To preview edits:

1. In the row for the notification you want to preview, click Preview.
2. The Preview Notification screen opens in a new tab.

Note: The preview notification will include a default data insert for the patron portal of http://mylib.account.worldcat.org/profile. This is not indicative of the link that will appear on real notifications sent from Tipasa, which will include your library’s patron portal URL.

If you send a test email or test SMS from within Service Configuration, it will include the http://mylib.account.worldcat.org/profile URL. If you want to see exactly how your notifications will appear to your patrons, send a notification from within Tipasa.

Send a manual notification

If you have enabled manual notifications, you can send these at any time in the Tipasa interface. Any notifications you have enabled as Manual sending in WorldShare interface will be available to send.

Note: Depending on the request, the list of templates enabled for manual sending will be pre-filtered:

- **Borrowing Library to Patron** - These notifications are available when viewing an interlibrary request as a Borrower. The To Email defaults to the patron's email.
- **Lending Library to Borrowing Library** - These notifications are available when viewing an interlibrary loan request as a Lender. The To Email must be entered.
• **Document Delivery Library to Patron** - These notifications are available when viewing a Document Delivery request. The To Email defaults to the patron’s email.

• **Other** - The Full Request Details (the default Tipasa template) and the Custom notifications are always available. The To Email must be entered.

To send a manual notification:

1. In the Tipasa interface, locate the request you want to send a notification about.
2. Open the request and click **Email**.
3. On the Send Message window, click **Choose a template**.
4. All applicable notifications that you have enabled for Manual sending in the WorldShare interface will appear in the
list. Standard notifications appear first (in order of the workflow), followed by custom notifications (in alphabetical order). Select the notification you want to send.

5. The message information is populated with the customized data you supplied for the notification in Service Configuration.

6. You can edit the message and add any information you want before sending the notification.

7. Click Send.

Note: Sending a manual notification will not override automated notifications. If a manual notification is sent to alert the patron of an event, the system will also automatically generate a notification to the patron when the status of the item changes.

Troubleshoot notifications

The notifications that are sent to patrons are collected into the Notification Log that appears in the Request History accordion of a request. The Log records all manual and automated notifications sent about the request, including details on when they were sent, how they were sent, and their status. The notification name is linked to the text of the message that was sent or attempted to be sent. You can resend any of the email notifications listed in the log by clicking Resend. SMS notifications cannot be resent. The User portal also shows the notifications that were successfully delivered, but patrons cannot view the content of the notifications that were sent to them. See Request Details and Communication Preferences for more information.

![Notification Log](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/120Notifications/Edit_and_send_notifications)

Notification status

The notification status in the Notification Log indicates whether any errors occurred while sending the notification or if it
was successfully delivered. The following table includes all statuses that can occur and how to proceed if you see the status in the Notification Log:

<table>
<thead>
<tr>
<th>STATUS</th>
<th>WHAT TO DO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate message</td>
<td>The system does not allow more than one message with the exact same content to be sent to the same user within an hour. OCLC recommends that you customize your email and SMS notification templates so that each notification contains unique information (such as the requested item's Title or Request ID). For information on customizing your notification, see Edit email and SMS notifications.</td>
</tr>
<tr>
<td>Failed to parse the template</td>
<td>Sign in to Service Configuration (WorldShare ILL &gt; Notifications) and preview the notification template. Correct any errors you find. See Edit email and SMS notifications for details.</td>
</tr>
<tr>
<td>Incomplete contact information for patron</td>
<td>Check the patron's account and notification preferences and verify they have a valid email address and phone number with country code listed.</td>
</tr>
<tr>
<td>Message delivered</td>
<td>The notification was successfully delivered to the recipient.</td>
</tr>
<tr>
<td>Missing or invalid field(s)</td>
<td>Verify that the required fields are present in the notification and resend the request manually.</td>
</tr>
<tr>
<td>Outdated message; cancelled</td>
<td>You may receive this status if you have first enabled overdue notifications and have requests that meet the criteria for the first, second, and third item overdue notices at the same time. In this case, the system will only send out the latest (third overdue) notification. The first and second overdue notifications will not be sent out, and they will appear in the Notification Log as outdated. Additionally, if you were using the second overdue notice, and you turned it off, for example, any notifications that were queued up for future sending would be canceled. For a list of all available notifications, see Notification types.</td>
</tr>
<tr>
<td>SMS messaging not supported for country</td>
<td>SMS notifications for the country is not supported at this time. Only phone numbers with a country code of +1 (United States and Canada) can receive SMS notifications.</td>
</tr>
</tbody>
</table>
A system error has occurred

Depending on why there was a system error, you can attempt to resend the notification. If the problem persists, and occurs on multiple notifications and the notification cannot be resent, contact OCLC Support.

System error or user opted out

Check the patron's account to see if the patron has opted out of receiving this type of notification.

Unable to deliver to mail address

Check if the patron has entered a valid email address. You should check: the request, the ILL Delivery Notification section in the patron's account, and the Library Record section in the patron's account. It may also mean that the email was sent to the email domain, but the patron's email address was not found.

Unable to deliver: mailbox full

The email domain has responded that the patron's inbox is full. Contact the patron using a method other than email.

User opted out

The patron needs to select to receive notifications in the user portal. Assist the patron in signing up for notifications or use a different method to contact the patron.

Email notifications delivered to spam or junk folder

If you are using the OCLC-supplied Reply To Email, you may need to whitelist this address to prevent Tipasa notifications from appearing in your patron's spam or junk folder. To do so, please see the information below:

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https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/120Notifications/Edit_and_send_notifications

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