Loan and user record alerts

Learn about the alert notices used for circulation in OLIB.

► Alerting> Notices

Email alert notices can be sent to staff and/or users for a variety of reasons. Alerting is a feature utilised in many areas of OLIB; the following notices are relevant to Circulation. It is normally recommended that you take a copy of the relevant Example report and edit the copy.

**Loan reminders**

If loan reminders are configured, OLIB sends an email or text message to a user at a pre-determined number of days before an item is due back, to remind the User to return it or renew it. OLIB has an Example Loan Reminder in the Notices domain that you can copy and customise. This can be set on a system wide or location specific level. It can apply to a specific User Category and / or Copy Category - or to a specified set of User Categories / Copy Categories (using a semi-colon “;” separated list).

If you enter a list of user categories, the notice will be sent to users with one of the specified categories. If you enter a list of copy categories, the notice will be sent to users who have an item with one of the specified copy categories on loan. If you enter both a list of user categories and a list of copy categories, the notice will be sent to users with one of the specified user categories if they have an item with one of the specified copy categories on loan.

Note: This means that a user could receive more than one Loan Due Reminder per day. For example, you could have a notice configured so that an alert is sent to users with either the staff or student user category if they have a standard or short loan copy on loan, plus a different notice configured to send an alert to users with the staff or library staff category if they have a reference copy on Loan. If a staff member has a standard copy and a reference copy on loan, he/she will receive both notices.

(The email can also include a url which will take the user to his/her account details in the OPAC to facilitate the self-renewal process.

**The Example Loan Reminder output**

Dear John,
You currently have the following items on loan and they are due back in the next 3 days:

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Title</th>
<th>Due Back</th>
</tr>
</thead>
<tbody>
<tr>
<td>C01923</td>
<td>The Grapes of Wrath</td>
<td>21-Jul-2018</td>
</tr>
</tbody>
</table>
Please either return them on or before the day they are due to avoid fines, or renew them. You can renew them yourself by going to your account details page in Folio.

Thank you,
A. Librarian
College Librarian
College Library Name

User list of loans

An alert email can be sent to users a pre-determined number of days before their membership is due to expire to remind them that they have items on loan and that these items should be returned before they leave. OLIB has an Example Record of Loan Notice in the Notices domain. This can be set on a system wide, location specific and/or user category specific level.

The Example Record of Loan output

Dear Mr Smith,
Your membership of the Library expires on 31 August 2018. If you have any items on loan, these will be listed below. Please ensure that you remember to return them to the Library before you leave.

Yours sincerely,
A. Librarian
College Librarian
College Library Name

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Title</th>
<th>Due Back</th>
</tr>
</thead>
<tbody>
<tr>
<td>C01923</td>
<td>The Grapes of Wrath</td>
<td>21-Jul-2018</td>
</tr>
</tbody>
</table>

The notice text should be amended to reflect your choice from Which Users? If left blank, it is sent to only users with loans.

The notice includes the Which Users? field:

- 1 to denote that the notice is to be sent just to users with loans
- 2 to denote that the notice is to be sent just to users without loans
- 3 to denote that the notice should be sent to all users

Optional: in Days Before Expire, enter a negative value to denote how many days after the user’s expiry date, when the list of loans notice should be sent to the User.
User account update alert

This is an alert triggered when a User record/account is updated or added. Alerts can be sent to notify users and/or designated members of the Library team when -

- a User has used the Self-Registration facility in the OPAC to either register for the first time or to update their User Account Details. This alert is also intended to send an alerting email to the user, when for example a password is first set or when it is changed. This includes SMS Notice Text and SMS or Email? fields.
- when a field is set to a specific value. For example when the Banned field is set to Y

**Fields to Watch** is where you enter the fields that should trigger the alert. They are entered surrounded by a semi-colon ‘;’ for example

;Password;

**Fields to watch>**

- Added to circ. List - Addressee - Agent - Banned - Barcode - Category - City - Cost - Cost Centre - Country - Date Joined - Date of Birth - District - Fmail Address - Fax Number - Forename - House Name - Idx status revoked - Initials - Institution - Interests - Last Renewed - Location - Membership Expiry Date - No. Copies - Note 1 - Note 2 - Note 3 - Note 4 - Note 5 - Note 6 - Note 7 -Note 8 -Note 9 -Notes - Occupation - Opt In - Overdues Suspended - Password - PO Box - Postcode - Region - Renewal Date - Resume On - Resume Overdues On - Resume Subscriptions On - Room Number - Scan status revoked - Send Renewal Alert - Send Renewal Alert To - Start Date - Status - Street - Subs. Service - Subscriptions Suspended - Surname - Suspend Email Notices - Suspend On - Suspend Overdues On - Suspend Overdues Reason - Suspend Reason - Suspend Subscriptions On - Suspend Subscriptions Reason - Suspended - Telephone - Telephone (Home) - Telephone (Mobile) - Telephone (Work) - Title - Type - Warn Before Renewal

To configure the user account update alert to be activated when a field in the user record is set to a specific value, enter the parameters in Fields to watch as follows:

;fieldname:value;

e.g:

;Banned:Y;

This would cause an alert to be sent whenever a user's Banned field is set to Y. This could be useful if you wanted to monitor the automatic banning of users via the Overdues system. OLIB sends one email per user banned.

**User's previous location**

The notice can be configured so that, if a user's location is changed, an alert is sent to the user's previous location to notify library staff that the user has registered with a different location. This way the previous location can archive any user records as appropriate:

1. On the user account update alert, library locations must add their location key ID to the Locations field. If more than one location is added, the location key ID must be separated by a semi colon, for example, ;LOC1;LOC2;

2. Set Transmit Type to **To user's former location**.
3. Enter the email addresses of the library staff to which the email should be sent in To List.

4. Set Fields To Watch to XLOC (no semi-colons, double quotes etc)

5. Set Enabled to Yes.

Note: if you don’t include the email address in the To List field and set the transmit to To user’s former location, the notice will not be sent. The email address field in the Location record is not referenced by this function.

Notice Text: This can include Users OLSTF tags (for email alerts to the user).

More tips:

- If you configure a user account update alert so that it is generated when a user’s email address is updated, the alert will be sent to both the original email address and to the new email address.
- If you are watching the barcode field, you can include the <OLD_BAR> tag in the notice record’s Notice Text field to include the original barcode in the alert as well as the new barcode.
- You can include details of the person who made the changes in the alert by adding <BY_XXXXX> tags in the Notice Text field, where XXXXX is any valid User OLSTF tag. The Example User Account Update Alert notice record includes <BY_FORE> and <BY_SUR> so that the forename and surname of the user who made the changes are included in the alert.
- You can also configure the alert to include the IP address of the PC on which the changes are made, using the <IP_ADDR> tag. This is included in the Example User Account Alert Notice notice record.
- The <PASSWORD> and <IP_ADDR> tags are only used in user account update alert notices. They are not available as general User OLSTF tags. So, for example, they cannot be used in a user output format record. This is to ensure that users’ passwords are not inadvertently included in, for example, an overdue notice to their supervisor.

Issue In Transit Alert

An alerting email can be sent to the Location where an In Transit copy has been issued.

Notices fields

The above alerts include the fields shown here (depending on the Notice Type you choose) and are set up as follows:

1. Go to Alerting> Notices.
2. Select the Example Loan Reminder record, the Example Record of Loan Notice, the Example User Added Notification or the Example User Account Alert Notice. In Other Actions choose Create Close Copy.
3. Click on the copy to display full details and the modify record.
4. Set Notice Type to Loans Due Reminder, User List of Loans, User Self-Registered Notification or User Account Update Alert.
<table>
<thead>
<tr>
<th>FIELDS</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locations</td>
<td>Enter Locations so that only users registered there will receive this loan reminder email. Enter a semi-colon separated list of Location codes, e.g. ;MAIN;BRIN; with a semi-colon at the beginning and at the end. If Locations is left blank the message will go to all users at all locations.</td>
</tr>
<tr>
<td>User Category</td>
<td>Choose so that only users on this category will receive the email. Alternatively enter a list of User Categories codes, surrounded by semi-colons ';' - e.g. ;STD;STU;LIB;. The same applies to Copy Category and Copy Categories.</td>
</tr>
<tr>
<td>Notice Text</td>
<td>Change the contents to specify the text and punctuation you wish to include in the email to the users. This is using the same syntax as is used for configurable export formats to define the main body of the email. The <strong>OLSTF Tags</strong> table indicates which User and Copy tags are available for you to use in the Notice Text field. For example, to include data from a field in the user record, enter the User OLSTF tag surrounded by angle brackets. If you only want the text to be included if the field itself contains data, surround the OLSTF tag and associated text with the appropriate hash tag combination, e.g: Remember to also complete librarian's name and position, and location name where indicated.</td>
</tr>
</tbody>
</table>

**User List of Loans**

```xml
<body><basefont size="3" color="blue" face="Arial">Dear <TIU> ,<SN>,<br /><br />Your membership of the Library expires on <EXP>. According to our records, you still have the following items on loan. Please ensure that you remember to return them to the Library before you leave <br /><br />Yours sincerely,<br />
Insert Name Here<br />
Insert Position Here<br />
Insert Library Name Here<br />
<br />
<TABLE WIDTH="650"><TR><TD WIDTH="100"><B>Barcode</B></TD><TD WIDTH="350"><B>Title</B></TD><TD WIDTH="100"><B>Due Back</B></TD></TR>#ITEM#<TR><TD VALIGN="TOP"><BC></TD><TD VALIGN="TOP"><COTI></TD><TD VALIGN="TOP"><TD</TD></TR>
```
User account update alert

<body><basefont size="3" color="blue" face="Arial"/><br/>Your password has been changed to: <basefont size="3" color="black" face="Courier New">New</basefont><br/><br>If you did not make or request this change, then please forward this message to the library for assistance.<br/><br>This change was made by <by_fore> <by_sur> at <ip_addr> on #sysdate#.</body>

Loans Due Reminder

<body><br/><br/>Dear <fn>,<br/><br/>You currently have the following items on loan and they are due back in the next 3 days:<br/><br/><table width="650"><tr><td width="100"><b>Barcode</b></td><td width="350"><b>Title</b></td><td width="100"><b>Due Back</b></td></tr><tr><td><bc></td><td><coti></td><td><retdate></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><br/><br/>Please either return them on or before the day they are due to avoid fines, or renew them. You can renew them yourself by going to your <b><a href='http://arthur/opac?xbarcode=barcodeu'>account details</a></b> page in WebView.<br/><br/>Thank you,<br/>Insert Name Here<br/>Insert Position Here<br/>Insert Library Name Here<br/></body>
<table>
<thead>
<tr>
<th><strong>FIELDS</strong></th>
<th><strong>INSTRUCTIONS</strong></th>
</tr>
</thead>
</table>
| To List, CC List, BCC List | Configure the recipients of the email:  
**To List**: used to specify who the notice should be sent to if it is not to be sent to the user.  
**CC List**: enter an email address to which a copy of the notice should be sent.  
**BCC List**: enter an email address to which a blind copy of the notice should be sent.  
Tip: in all three of the above fields, multiple email addresses can be entered. Multiple addresses should be separated with a semi-colon. |
| Subject Line | Enter the text to be used as the subject line of the notice.  
**More options for the Loans Due Subject line**  
You can include Copies OLSTF tags in the **Subject**: line of Loans Due reminders. OLIB replaces the tags with the relevant data when the email is sent. For example:  

1st Library Loans reminder for 
<CP_COTI>, Barcode <CP_BC>  
will be output in the Subject: line of the reminder as  

Subject: 1st Library Loans Reminder for HTML For Dummies, Barcode JC099832  
If the email includes several copies, the details from the first copy only will be added to the Subject line.  
Tip: write the **Subject** line to reflect the fact that the notice could relate to more than just that item, e.g:  

First Library loans reminder for 
<CP_COTI>, Item Barcode <CP_BC>, etc. |
| Days Before Ret. Date | Use this for the Loan Reminder notice. Enter the number of days before the return date that OLIB should send the reminder. For example, if Days Before Ret. Date is set to 3 and an item is due back on 15 August, the system will send a Loan Reminder to the user on 12 August (or the
<table>
<thead>
<tr>
<th>FIELDS</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days Before Expiry</td>
<td>Use this for the Record of Loan notice. Enter the number or days prior to the users' membership expiry date that OLIB should send the notice. For example, if Days Before Expiry is set to 7 and the user's membership is due to expire on 31 August, the system will send a List of Loans Loan notice to the user on 24 August (or the first day after 24 August on which daystart is run).</td>
</tr>
<tr>
<td>Enabled</td>
<td>Set to Yes for OLIB to start sending notices in daystart, using the above settings. If Enabled is set to No or is null, the notices will not be sent.</td>
</tr>
<tr>
<td>Fields to Watch</td>
<td>Enter the fields that would cause the alert to be sent if they are changed. Enter this string surrounded by semi-colon ';'. For example ;Password;. In this case whenever the User's password is updated, an alerting email will be sent. Note: the fields should match those names present in the Users&gt; Update Audit Trail screen.</td>
</tr>
<tr>
<td>SMS Notice Text</td>
<td>If this alert is to be sent as a text message instead of, or as well as an email, enter the SMS Notice Text.</td>
</tr>
<tr>
<td>SMS or Email?</td>
<td>In this drop down, select from SMS, Email or Both.</td>
</tr>
</tbody>
</table>

The **SMTP server name** for your organisation must also be configured for email alerting to work.

For SMS texting, the [configuration details](https://help.oclc.org/Library_Management/OLIB/Circulation/Users_and_copies/30Loan_and_user_record_alerts) should be entered at the level of OLIB Defaults or your Users' Location record.