Learn how to configure the email notices and texts for overdue items in OLIB.
►Alerting> Notices

These are required by the Circulation module if the automated overdue system is to be implemented. The example notices here provide the text of each individual overdue notice, for example, a first, second and final overdue notice. Recall notices are also created here. Overdue and Recall messages can also be sent via SMS Texting.

Notices can be used to:

• configure the content and format of the overdue notice
• determine who the notice should be sent to
• whether it should be CC’d and/or BCC’d and the subject line of the email

For emails, the text uses the same syntax as used for configurable export formats: the OLSTF format.

The Location, User Category and Copy Category are not used in Overdue Notices because these values are taken from Loan Terms. (The Overdue Notice is attached to an Overdue Sequence and this is attached to Loan Terms). Users and Media Type(s) are also not used for Overdue Notices.

Create overdue notice

Caution: copy the text from the Example First Overdue Notice into a new Notice that you create. Do not configure any Example notices and run them, as these would be overwritten with a new copy of the Example when a future OLIB upgrade is applied.

1. A wildcard (%) search in this domain shows the Example First Overdue Notice already provided with OLIB.
2. Select this record and in Other Actions choose Create Close Copy.
3. Click on the copy to display full details and modify record:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notice No.</td>
<td>System generated unique number.</td>
</tr>
<tr>
<td>Notice Type</td>
<td>Set to Overdue Notice.</td>
</tr>
<tr>
<td>Brief / Full Description</td>
<td>Enter to identify this notice</td>
</tr>
<tr>
<td>Notice Text</td>
<td>Change the contents to specify the text and punctuation</td>
</tr>
</tbody>
</table>
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 OLSTF Tags table indicates which User and Copy tags are available for you to use in the Notice Text field for overdue notices. 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:

```html
<body><basefont size="3" color="blue" face="Arial">Dear <TIU> <SN>,<br /><br />According to our records, the items listed below which are currently on loan to you are overdue. Please either renew them or return them to the library immediately. Fines are accruing on them on a daily basis, so the longer you leave it the more you will have to pay.<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><TD WIDTH="100"><B>Current Fine</B></TD></TR>#ITEM#<TR><TD VALIGN="TOP"><BC></TD><TD VALIGN="TOP"><COTI></TD><TD VALIGN="TOP"><RETDATE></TD><TD VALIGN="TOP"><CF></TD></TR>#/ITEM#</TABLE></body>
```

Remember to also complete librarian's name and position, and location name where indicated. The example above contains HTML tags so that the email is properly formatted and reads as follows:

**Notice text**

Dear Mr Smith,
According to our records, the items listed below which are currently on loan to you are overdue. Please either renew them or return them to the library immediately. Fines are accruing on them on a daily basis, so the longer you leave it the more you will have to pay.

Yours sincerely,

A. Librarian

Librarian job title

Library location name

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Title</th>
<th>Due Back</th>
<th>Current Fine</th>
</tr>
</thead>
<tbody>
<tr>
<td>C01923</td>
<td>The Grapes of Wrath</td>
<td>12-Jan-2017</td>
<td>5.20</td>
</tr>
</tbody>
</table>

More options for Notice Text

**OLSTF Copies tags #ITEM#…#/ITEM#**

This will repeat whatever is between the not null item hash tag set for each copy record on loan to the user for whom a notice is being generated.

It is possible to also include Title OLSTF tags in the #ITEM#…#/ITEM# block.

**User addresses**

If users addresses are to be included, some of the following tags should also be present in the notice text - UORADDRESSEE, UORHOUSE, UORSTREET, UORPOBOX, UORDISTRICT, UORCITY, UORREGION, UORCOUNTRY and UORPOSTCODE.
Other items on loan to the user #OITEM# ...

To also include a list of the other items the user has on loan, use the #OITEM# ... #/OITEM# section. For example:

The following is a list of the other items that are currently on loan to you. Please note that some of these may also be overdue, but not sufficiently as to have generated an overdue notice for them:

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Title</th>
<th>Due Back</th>
<th>Status</th>
<th>Current Fine</th>
</tr>
</thead>
<tbody>
<tr>
<td>C09182</td>
<td>Judicial statistics</td>
<td>03-Feb-2017</td>
<td>On Loan</td>
<td>0.20</td>
</tr>
<tr>
<td>FIELD</td>
<td>INSTRUCTIONS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Transmit Type</strong></td>
<td>Set to <strong>To user's email address</strong> for the notice to go to the email address in the User's record.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Note: the Users Email ID field is used, not the email field in the Address details.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the User's email address is missing, OLIB sends the Notice to the email address you enter in the <strong>To List</strong> field. This means you can send overdue notices to yourself, for Users who do not have an email address; they can be printed and posted off to the user.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If you set Transmit Type to <strong>To To List</strong> the Notices are sent directly to the email address in the To List field. This can be used if you want notices to always go to a member of staff, e.g. for printing and posting, rather than directly to the Users.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Alternatively, you can set the Transmit Type to <strong>To user's supervisor</strong> for the notice to go to the Supervisor rather than the user who has the items. This can be used perhaps for a final overdue that you may wish to send to a Supervisor or Tutor.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If you set Transmit Type to <strong>To Copy's Location</strong>, the notice is sent to the Location's email address, for example for shelf checking and annotation with the replacement cost, before sending the letter to the user.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Send single email</strong></td>
<td>Only set to Yes if sending a single email attachment for multiple overdues.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CC To Supervisor</strong></td>
<td>Yes/No whether notice is copied to student supervisor entered on the user's record.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>From Address</strong></td>
<td>Enter a valid email address, e.g. a generic address for your library, so that, if the User clicks the Reply button, the reply email will be delivered to the appropriate member of staff who deals with User responses to overdue notices.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>To/CC/BCC List</strong></td>
<td>Configure the recipients of the email:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FIELD</td>
<td>INSTRUCTIONS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To List</td>
<td>To List: used to specify who the loan reminder 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 overdue notice should be sent. BCC List: enter an email address to which a blind copy of the overdue notice should be sent. Tip: in all three of the above fields, multiple email addresses can be entered. Separate multiple addresses with a semi-colon.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CC List</td>
<td>Enter the text to be used as the subject line of the Overdue Notice.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BCC List</td>
<td>More options for the Subject line of the email</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tip</td>
<td>You can include COPIES OLSTF tags in the Subject line of overdues notices. OLIB replaces the tags with the relevant data when the email is sent. For example: 1st Overdue for &lt;CP_COTI&gt;, Barcode &lt;CP_BC&gt; will be output in the Subject: line of the overdue as Subject: 1st Overdue 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 Overdue Notice for &lt;CP_COTI&gt;, Item Barcode &lt;CP_BC&gt;, etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enabled</td>
<td>Set to Yes.</td>
<td></td>
<td></td>
<td></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 text.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMS or Email?</td>
<td>Select from the drop down SMS, Email or Both.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
As shown above, the notice will automatically contain location address, name and address of user, details of overdue items, and if appropriate, fines.

When each Notice is configured, e.g. First, Second, Third Overdue Notice, compile these into Overdue Notice Sequences.

**Send overdue notices as an attachment**

From OLIB 9 SP14 onwards, if you have still not implemented this aspect of overdue notices and would like to, please contact your local OCLC Support office to discuss alternative options.

An overdue letter can be generated from an RTF template attached to the notice record and sent as an attachment to the email. In this way, graphics such as the library’s logo, can be included in overdue letters. The RTF template will be a standard document with your library’s logo, address, letter text, etc., together with an `<ITEMS>` tag in the relevant point in the letter, saved as an rtf file. The `<ITEMS>` tag will be replaced by the details of the overdue items, as defined in the relevant output format record. A model RTF template can be downloaded from the OLIB For Customers web site. Note that if you use the overdue/recall address flag in Users addresses, the rtf file needs to include the UOR tags listed above in Notice Text.

For help in editing the rtf, see [Edit rtf notices](https://help.oclc.org/Library_Management/OLIB/Circulation/Overdue_notices/Overdue_notices).

Caution: it is recommended you do not use MS Word to edit overdue RTF templates.

The following configuration is required to set OLIB to send an overdue notice as a letter attached to an email rather than as an email:

1. A copies Output Format record for use in overdue notices is delivered as standard, you may wish to review this first. (It is linked to the Example First Overdue Notice notice OP003 and may be linked to any notices you have configured). Alternatively create a new Output Format record. From the Menu, select Data Exchange Reference Data> Output Formats.
2. Complete the Description field. For example, enter a description such as **Format for the copy details of the overdue notice rtf file**. Ensure that the Domain field is set to Copies.
3. Enter the output of the notice in the Format Text field.

A typical output format record would contain the following in the Format Text field:

```text
<CP_BC> - <CP_COTI>
\tab <CP_RETDATE>
\tab <CP_CF>
\tab <CP_CP>
\par
```

The `
\tab` and `
\par` parts of this text are rtf codes for the TAB character and the 'new paragraph' marker. The above format will display the copy barcode and title (separated by space-hyphen-space), then a tab, then the return date, then another tab, and finally the current fine. A carriage return will then be added so that the next copy is displayed on a new line.

Titles OLSTF tags can also be included, e.g. `<ST>`.
Other items user has on loan: you can also include details of other items the user has on loan. Use the <OITEMS> tag, e.g.:

The following is a list of the other items that are currently on loan to you. Please note that some of these may also be overdue, but not sufficiently as to have generated an overdue notice for them:

<OITEMS>

4. Set up the Overdue Notices and link them to the Overdue Sequences and Loan terms as described in Overdues configuration.

5. On the Overdue Notice record attach an RTF template as described above, in the Object field.

6. Set the Object Type to ASCII text. Ensure that the In Database and Import Now flags are set to Yes before saving the object, so that the rtf template is imported into the database.

7. Set the notice record's Incl. As Attachment? field to Yes.

8. Set the notice record's Output Format to the correct Output format, e.g. Format for the copy details of the overdue notice rtf file. The format for use in overdue notices is delivered as standard. It is linked to the Example First Overdue Notice notice OP003 and may be linked to any notices you have configured.

The overdue letter will be included as an attachment to the email that is sent to the user, To List email address(es) and/or the user’s supervisor.

The library can also receive a single email that includes a single attachment containing all the overdues.

Alternatively, Overdue letters can be printed rather than sending them as attachments to an email.

1. Configure the overdue notice as described above.

2. Set the notice record’s Transmit Type to To To List.

3. Enter the email address of an email account which a mail-to-print gateway is monitoring.

The mail-to-print gateway will pick up the email and print the attached letter to the designated printer. These letters can then be collected for sending to the user and/or the user’s supervisor.

Copy/User Location-specific letters

To use this feature, the system manager first needs to add the Copy/User Location Letter field to your Overdue notice layout using Layout Manager.

It is possible to link several letter RTF templates to an overdue notice record, one for each location to which the overdue notice is sent. In this way, a different letter can be generated and sent which is specific to the location to which it is being sent.

Location-specific letters are entered in the new Copy/User Location Letters field using the following workflow:

1. With the notice record in modify mode, click New under the Copy/User Location Letters field;

2. Enter the details of the location’s letter RTF template as usual. (Don’t forget to set In Database and Import Now to Yes before saving the new object);

3. On return to the notice screen, select the letter you just added and select the Set/Clear location action;

Printed: Sun, 25 Sep 2022 10:58:54 GMT
4. This displays a pop-up window with the list of locations. Select the location whose letter you've just added and click OK to return to the notice record;

5. The location should now be displayed to the left of the hyphen;

6. Repeat for the other locations’ letters.

Note that you will not be able to add another copy/user location letter until you have set the location for all existing copy/user location letters using the above workflow.