Configure overdues

Learn how to set up processing of overdue items in OLIB. This information explains the steps for the overall configuration of the Overdues system in OLIB.

Configure

1. If you would like to send rich text format (rtf) attachments with the email notices, download and edit the rtf letter in preparation.
2. Go to Alerting> Notices. Here you can copy the Example Overdue Notice provided to create e.g. 1st, 2nd, 3rd overdue notices.
3. Go to Circulation Reference Data> Odue/Recall Segs. Create one or more sequences showing which Notice to send after how many days overdue.
4. Assign Overdue Sequences to the combinations of Users / Copy Categories in the Loan Terms domain.
5. Set up Overdues defaults in the OLIB Defaults domain.
6. For email Alerting to work, configure your SMTP Server name in the System Administration> Server Config domain.
7. If the library is going to use SMS Texting, enter the configuration details at the level of OLIB Defaults, or the Users Location record.
8. If the library is to going to use SMS Texting, ensure all user/patron records have their mobile number entered in Telephone (Mobile).
9. To configure whether or not OLIB should generate overdues/recalls on closed days and in holiday periods set the Send Odues/Recalls? parameter in Locations and Calendars.
10. To enable overdue reminders to be transmitted to the copy's library location instead of to the user, configure the location's email address in User Management> Locations: Overdues/Recalls Parameters.

Test

It is recommended that you first trial your overdues configuration. For example, set up an overdue sequence with at least 2 steps - set just 1 day apart. Link that sequence to the Loan Terms for a copy category / library staff user category. Next, issue an item with those loan terms to a member of staff, using the manual return date function to issue items for return the next day. When the item becomes overdue, the staff member should receive the overdue notice via email.

When ready to implement on your live system, ensure that OLIB Defaults are correct and that email addresses are populated correctly in User records. Alternatively, if the notices are to be emailed to a member of staff for printing, ensure their email address is entered in the To List of the relevant Overdue Notices.