XIII. SECTION XIII NOTICES, MESSAGING PREFERENCES AND MESSAGING QUEUE

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A. NOTICES – PRINT MESSAGES QUEUE

In order to print notices to a regular page printer, make sure that you are not logged in using one of the Bibliovation Print Profiles (Receipt or Spine Labels) and that your workstation is connected to a printer that will print a full page.

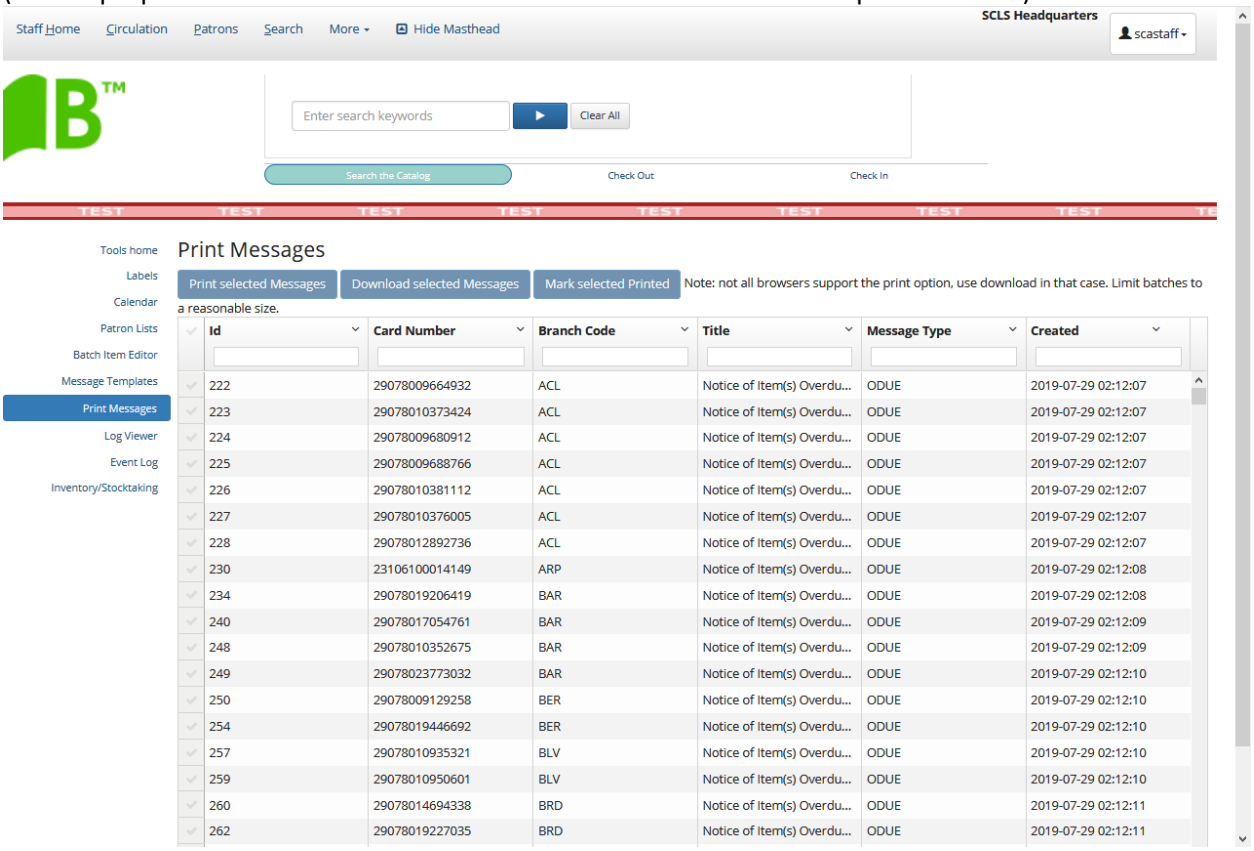
Bibliovation main page
Click on **Tool**s hyperlink.
On the Tools screen, click the **Print Messages** link.

Print Messages screen:
ALL Notices that were not able to be delivered via email will be included in this generated list.

Columns in this list include:

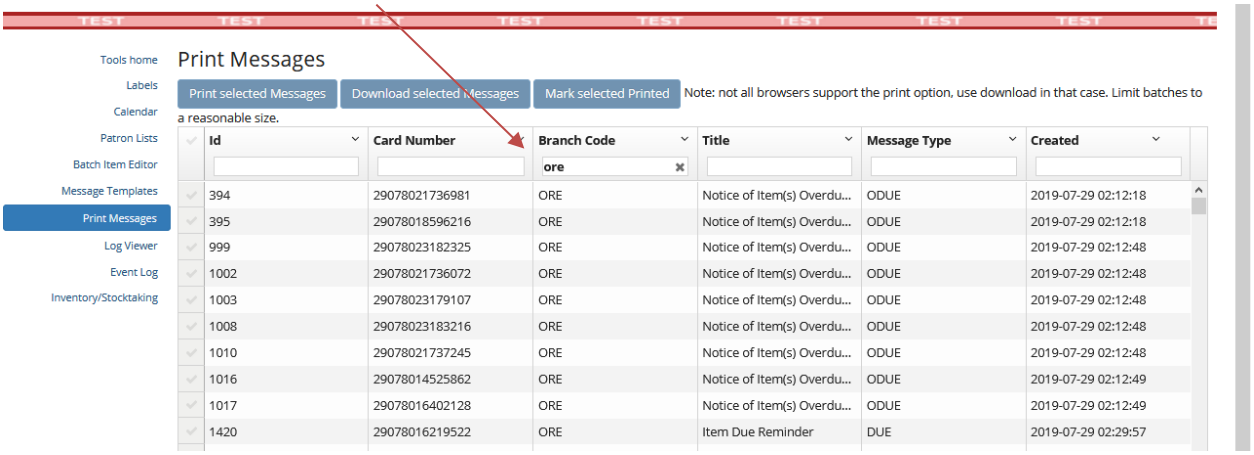
ID	Notice ID (internal number, auto-generated)
First Name	Patron first name
Last Name	Patron last name
Card Number	Patron barcode
Branch Code	Check Out library (Advance overdue, Overdue) or Patron's Home library (Billing)
Title	Notice subject heading
Message Type	Code for message type
Created	Date notice was generated

(for the purpose of this screen shot I have hidden the columns with the patron names)

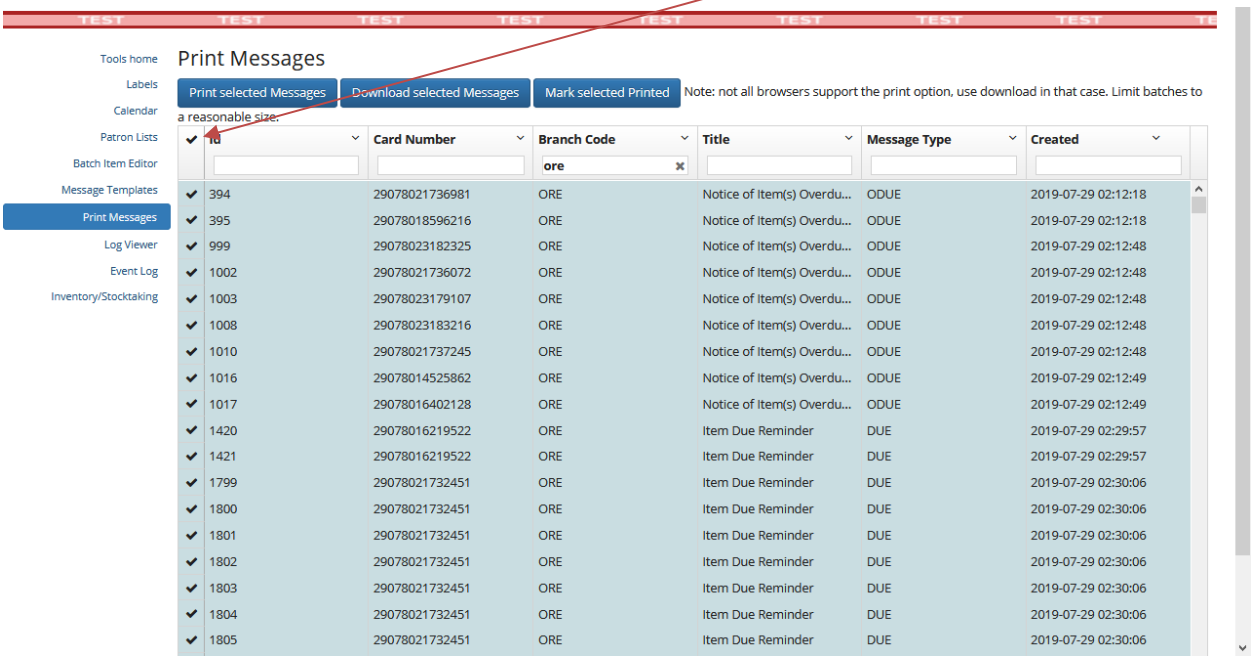


Id	Card Number	Branch Code	Title	Message Type	Created
222	29078009664932	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
223	29078010373424	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
224	29078009680912	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
225	29078009688766	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
226	29078010381112	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
227	29078010376005	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
228	29078012892736	ACL	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:07
230	23106100014149	ARP	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:08
234	29078019206419	BAR	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:08
240	29078017054761	BAR	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:09
248	29078010352675	BAR	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:09
249	29078023773032	BAR	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:10
250	29078009129258	BER	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:10
254	29078019446692	BER	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:10
257	29078010935321	BLV	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:10
259	29078010950601	BLV	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:10
260	29078014694338	BRD	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:11
262	29078019227035	BRD	Notice of Item(s) Overdu...	ODUE	2019-07-29 02:12:11

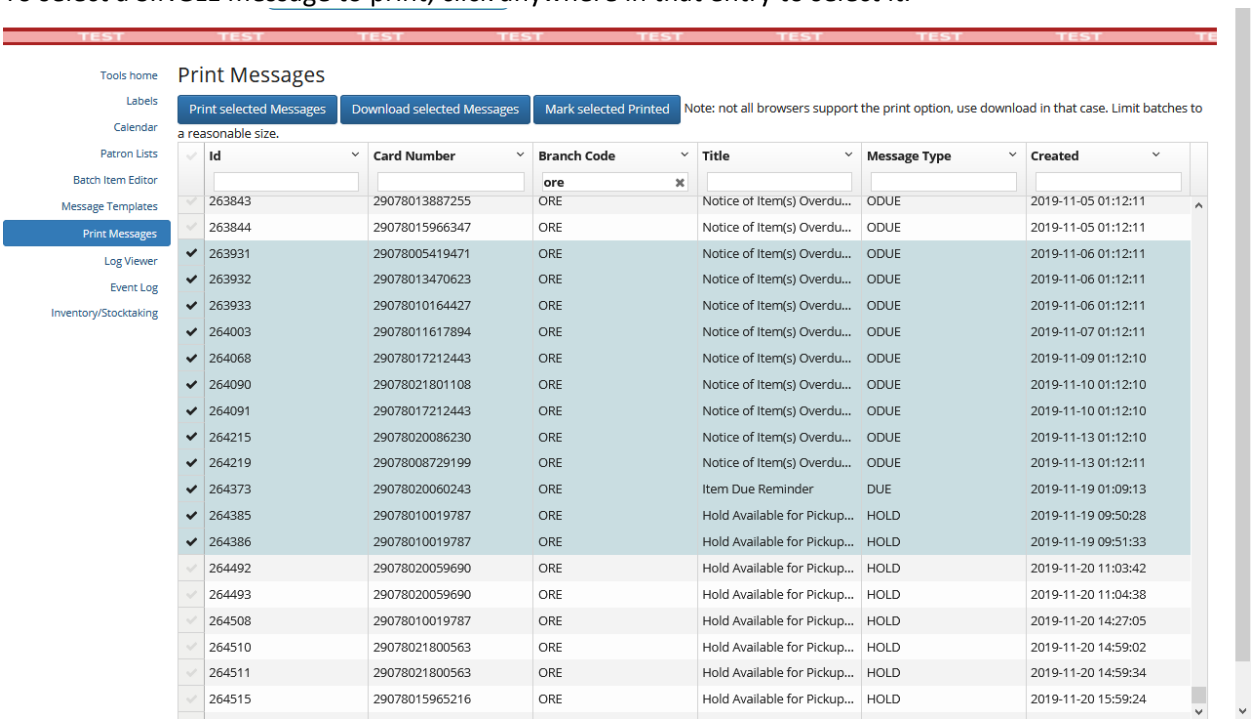
To extract the notices for your Library, enter your Library's Delivery code in the box under the Branch Code column header.



To select ALL messages to Print, click on the checkbox in the Header row.



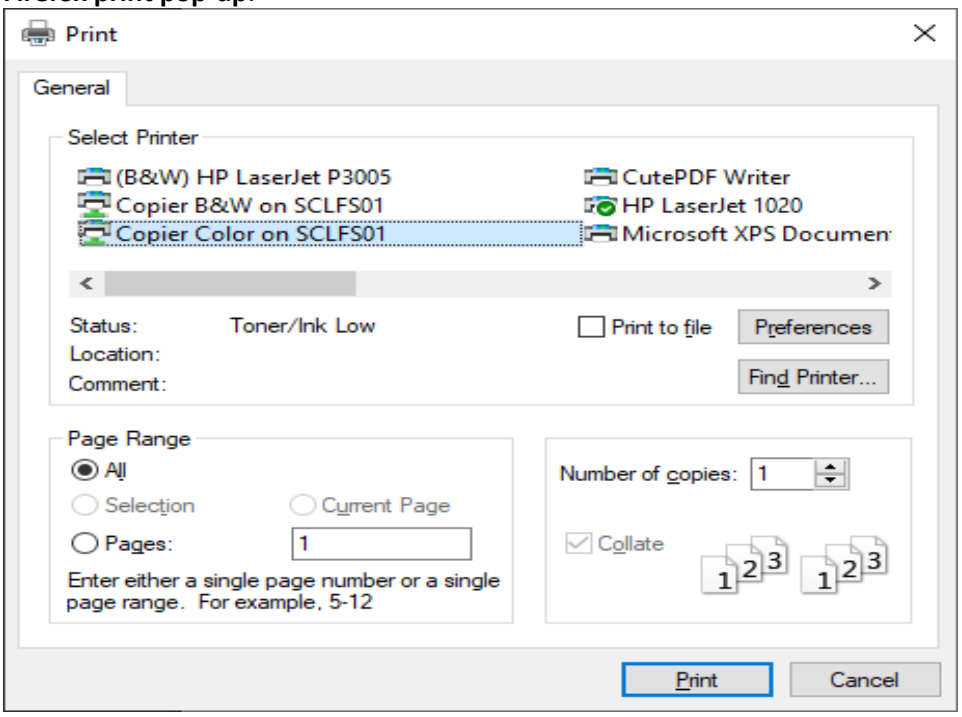
To select a SINGLE message to print, click anywhere in that entry to select it.



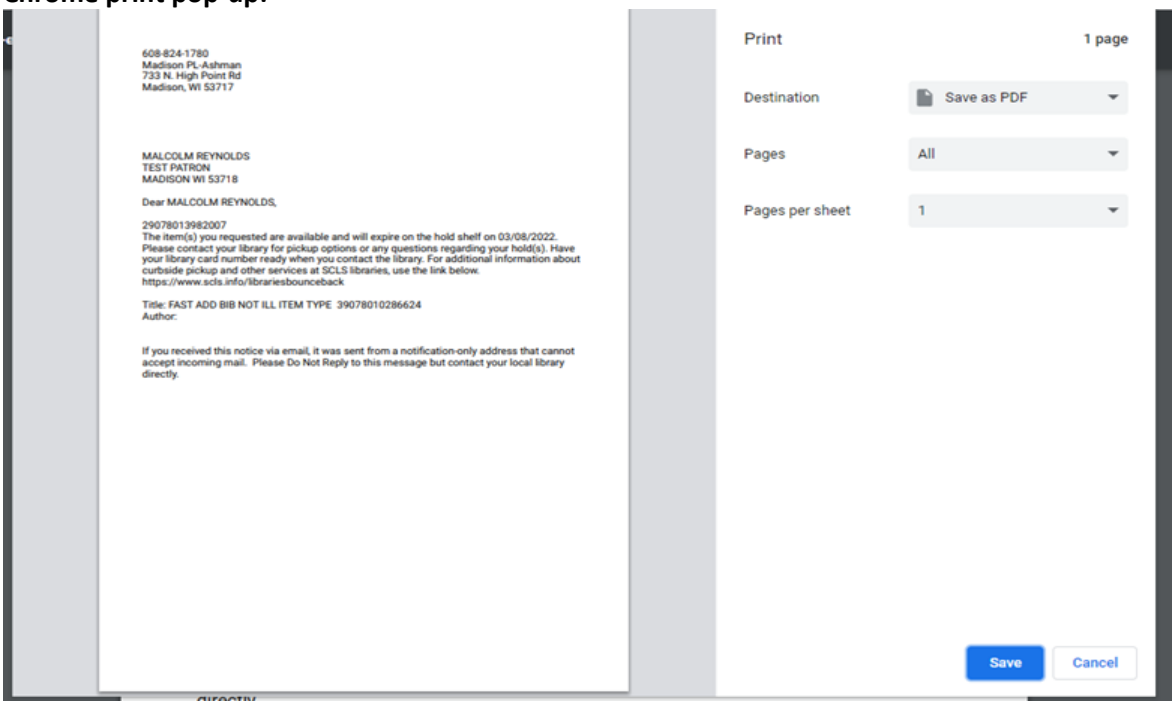
Click the “Print selected Messages” button when you are ready to print.

Your screen will shift to an Adobe formatted (pdf) screen and you will see a pop-up requiring you to select a Printer.

Firefox print pop-up:



Chrome print pop-up:



Select the Printer (Firefox) or Destination (Chrome) you normally use for full page printing from your workstation.

When you have confirmed that the notices have completely printed, click the **Mark Selected Printed** button. This action will remove the notices from this list. This is a good way to confirm that notices were actually printed and should be included in your regular workflow.

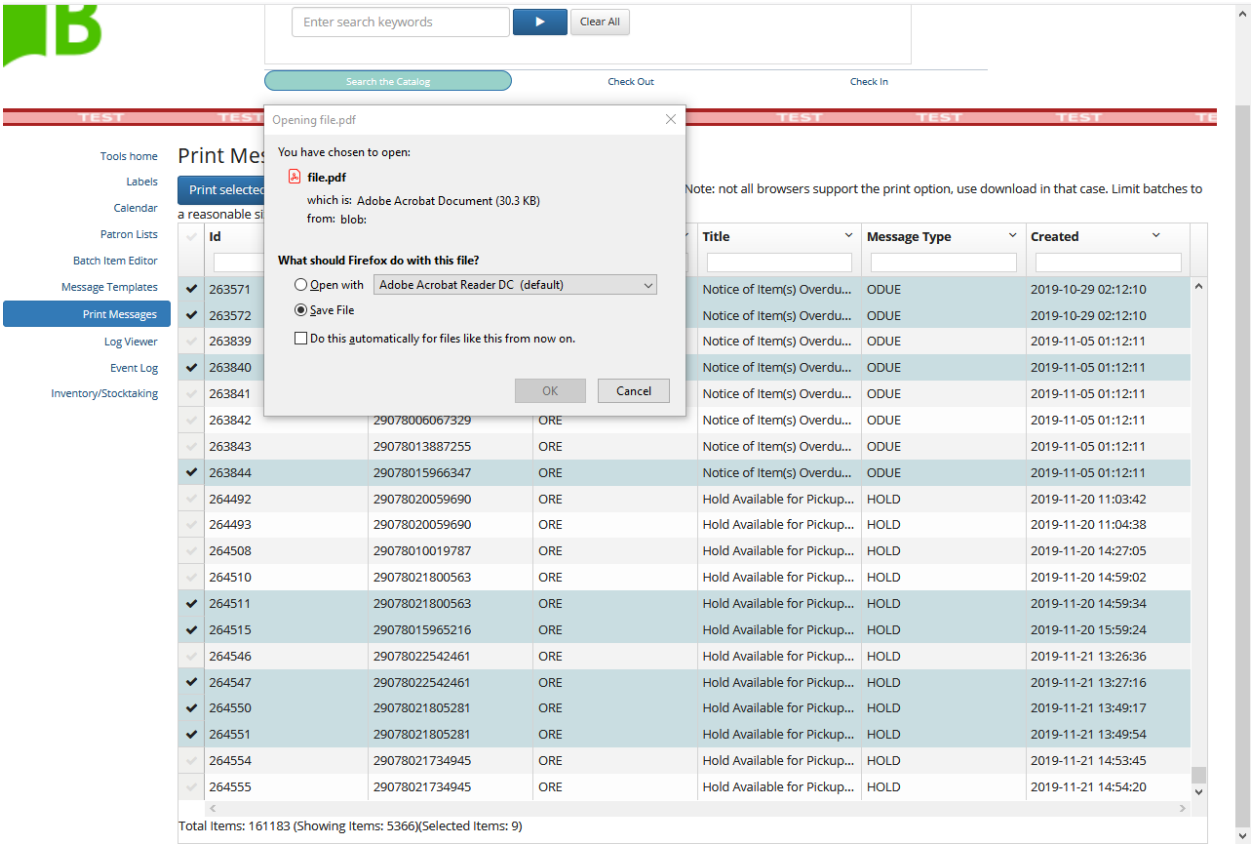
If your library does not print the paper Hold and Overdue notices and you have other ways to inform patrons that they have holds to pick up or overdue items, **you still need to select the notices and click the "Mark Selected Printed" button to remove them from the table**.

YOU SHOULD ALWAYS PRINT AND MAIL BILLING NOTICES (Notice of Unresolved Charges).

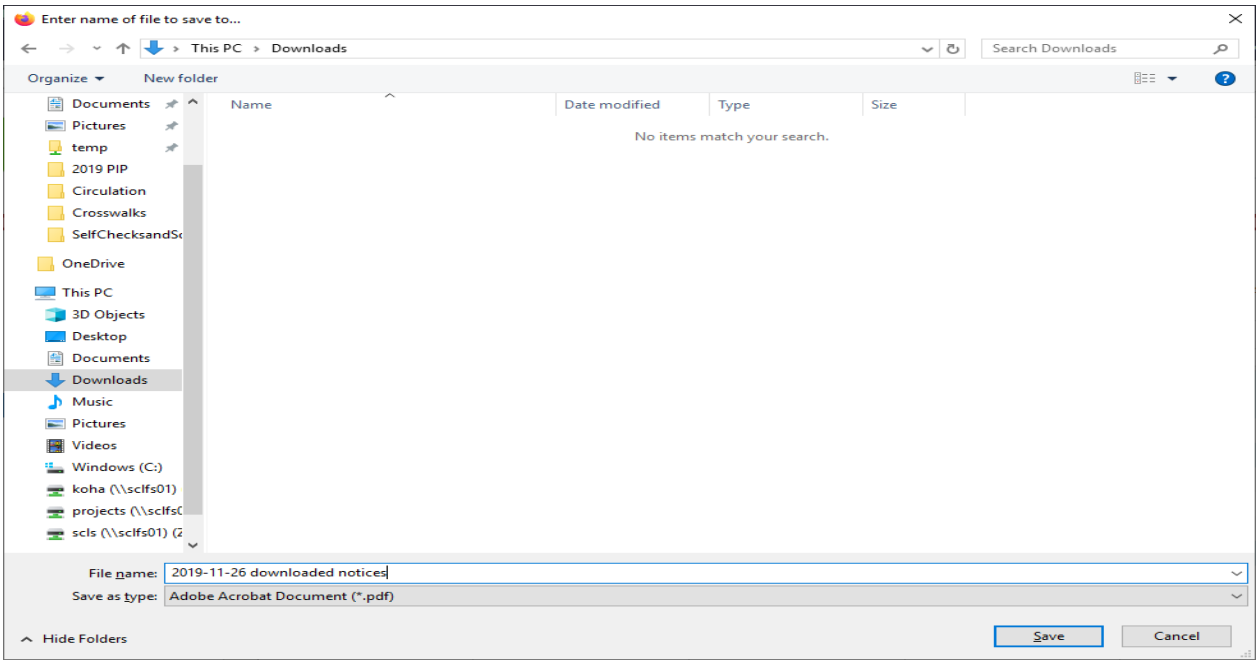
Another option is to Download the list of your library's notices to a file and save it where you can extract it as needed.

- Select the message or messages that you want to Download and click the "Download Selected Messages" button.
- You will get a pop-up button defaulting to Save File.

Firefox pop-up:

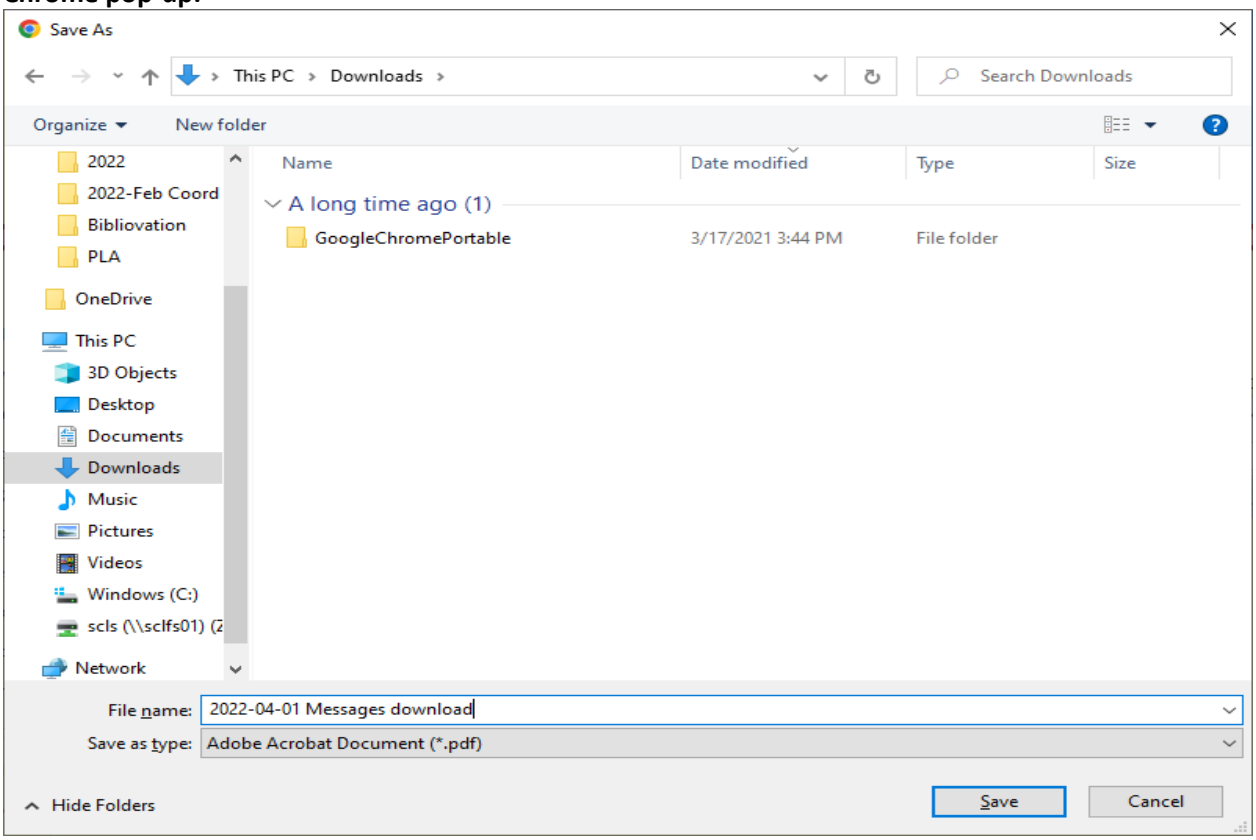


- Click the OK button.



- Select your location (Downloads folder or on your Desktop create a folder named “Downloaded Notices).
- Name your file something like “yyyy-mm-dd downloaded notices” and click Save.

Chrome pop-up:



- Select your location (Downloads folder or on your Desktop create a folder named “Downloaded Notices).
- Name your file something like “yyyy-mm-dd downloaded notices” and click Save.

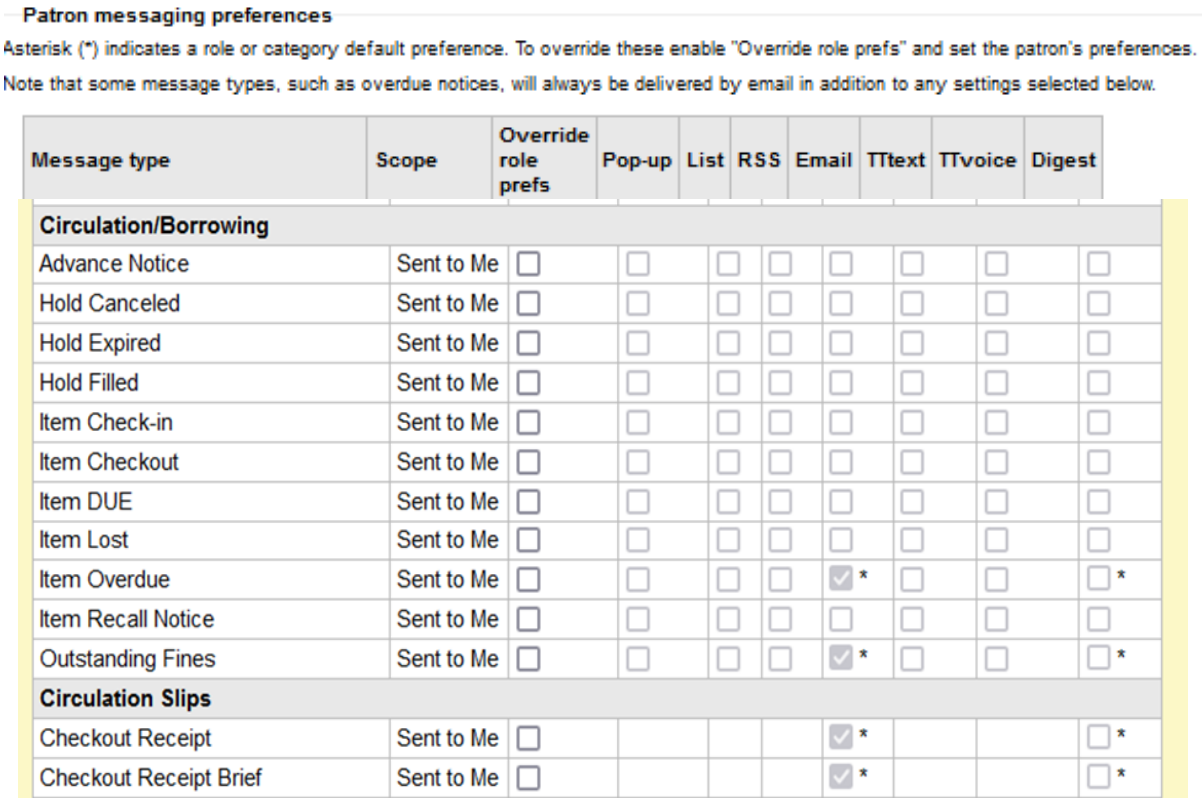
B. MESSAGING PREFERENCES

Messaging preferences set the delivery method of specific Circulation/Borrowing notices for each patron.

The only Default preferences set for all walk-in Patron Categories are Overdue Notices, Outstanding Fines (billing notices) and Circulation (both Check Out) slips. Staff will set other Messaging preferences for each patron based on their preferences.

The screenshots below show ALL of the Message Types in Bibliovation. **ONLY change settings for the CIRCULATION/BORROWING messages and ONLY use the options provided in the next section, NOTICE DELIVERY OPTIONS.** The other Message Types are for Staff Use Only and have either not been tested or have not been documented for general use.

We will document the additional options when we are certain that the delivery methods are needed, working correctly and that patron records are set-up correctly.



Patron messaging preferences

Asterisk (*) indicates a role or category default preference. To override these enable "Override role prefs" and set the patron's preferences.

Note that some message types, such as overdue notices, will always be delivered by email in addition to any settings selected below.

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Circulation/Borrowing									
Advance Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Circulation Slips									
Checkout Receipt	Sent to Me	☐				☑ *			☐ *
Checkout Receipt Brief	Sent to Me	☐				☑ *			☐ *

Columns:

Message Type	Type of message
Scope	Delivery scope
Override role prefs	Check this box to override the defaults and to select the option for the patron
Pop-up	DO NOT SELECT FOR WALK-IN PATRONS
List	DO NOT SELECT FOR WALK-IN PATRONS
RSS	DO NOT SELECT FOR WALK-IN PATRONS
Email	Email notification; also used for messages that are sent to the Print Messages table.
TTtext	Text notification ONLY FOR HOLD FILLED NOTICES
TTvoice	Voice notification ONLY FOR HOLD FILLED NOTICES
Digest	FOR EMAIL ONLY. Check to provide digested (multiple entries per notice).

- Do not select for text or voice messages.

Multiple Text and Voice messages, for the same patron, are digested **after** those notices are sent to the Talking Tech server. You do not need to (cannot) select "Digest" for Text or Voice messages in this table.

TIPS for EMAIL Notices:
Be aware that if there is no value in the primary email field, the system will roll over to the secondary email field; if there is a value in that field, the notices will be sent to that address.

You can send email notices to at least two different email addresses – **enter both addresses in the Primary field and separate the different addresses by a comma.**

Types of messages/notices

- **Advance Notice. Email or Print only**. If checked, an automatic email notice will be generated by the system reminding the patron about items due; generated **two** days prior to the due date (this is a default setting for all patrons and cannot currently be changed by staff). **DO NOT select** if the patron has selected the "Item DUE" notice option.
    - Digest: **ALWAYS** choose this option, *in addition to the notice type*, to have more than one notification appear in each email.
    - It is recommended that this notice not be selected for a patron that does not have an email address. Printing and mailing these notices probably take longer to be received by the patron than two days.
- **Hold Canceled. Email or Print only.** If checked, a notice that a hold for the patron was canceled will be generated.
    - Digest: **ALWAYS** choose this option, *in addition to the notice type*, to have more than one notification appear in each email.
- **Hold Expired. Do Not Select**. This is a notice to inform a patron that an unfilled hold has expired. We do not expire unfilled holds.
- **Hold Filled. Settings for Email and Print.** If checked, notice(s) will be generated informing the patron that a hold or holds are available for pickup. Notice is generated when the item/items are checked in at the pickup location.
    - One email notice per item checked in will be generated and sent within the hour the item is checked in at the pickup location.
    - Digest: **ALWAYS** choose this option, *in addition to the notice type*, to have more than one notification appear in each email.
- **Hold Filled. Settings for Voice and Text.** If checked, notice(s) will be generated informing the

patron that a hold or holds are available for pickup. Notice is generated when the item/items are checked in at the pickup location.

- Voice and Text hold notices accumulate within the system. At the end of the day, notices for all holds that have not been checked out to the patron will be sent to the i-Tiva/Talking Tech server. The NEXT DAY, Talking Tech will send out a morning burst of Text messages and then start calling patrons at 9:00 am, except on Sundays, with Voice messages.
- **Digest: DO NOT choose this option**. Multiple Text and Voice messages for the same patron are digested after being delivered to the Talking Tech server. If you try to select this option, it will not stay selected.
- **NOTE: Staff no longer need to enter the "T1-" prefix in front of the patron's Primary phone number in order to have Hold Filled messages delivered via text.**

- **Item Check-in**. **Do Not Select**.
- **Item Checkout**. **Do Not Select**.
- **Item DUE: Email only**. If checked, an automatic email notice is generated and sent **one day** prior to the due date reminding the patron about items due. **DO NOT USE** if the patron has selected the Advance Notice option.
  - Digest: **ALWAYS** choose this option, *in addition to the notice type*, to have more than one notification appear in each email.
- **Item Lost**. **Do Not Select**. For staff use only.
- **Item Overdue. Email or Print ONLY.** ALL patrons receive overdue notices by default. These are set to Digest as a default as well.
- **Item RECALL Notice**. **Do Not Select.** We do not use the academic library recall functionality.
- **Outstanding Fines**. **Email or Print ONLY.** Billing Notices/Notice of Unresolved charges. Automatically generated when a patron owes a balance of $50.00 or more on their account.

C. NOTICE DELIVERY OPTIONS

Here is a cheat sheet to help you set up the Messaging preferences for your patrons, based on how they want messages delivered.

Patron wants -
Hold notification: Text message
Advance notification: Email
Overdue notices: Email

Set up their contacts like this:

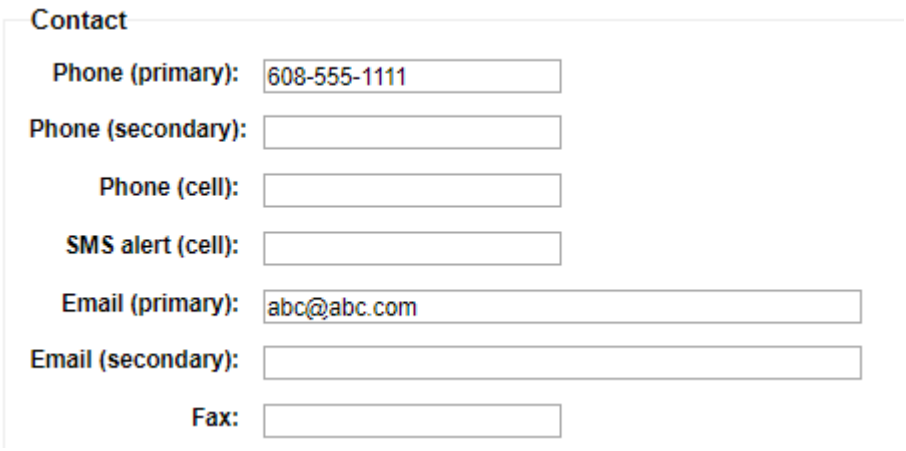
IT IS NO LONGER NECESSARY to add the T1-" prefix to the phone number to send text messages for Hold Filled notices.

Set up their Messaging Preferences like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☑	☐	☐	☐	☑	☐	☐	☑
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☐	☐	☐	☐	☑	☐	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

Patron wants -
Hold notification: Phone call
Advance notification: Email
Overdue notices: Email

Set up their contacts like this:



Set up their Messaging Preferences like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☑	☐	☐	☐	☑	☐	☐	☑
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☐	☐	☐	☐	☐	☑	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

Patron wants -
Hold notification: Email
Advance notification: Email
Overdue notices: Email

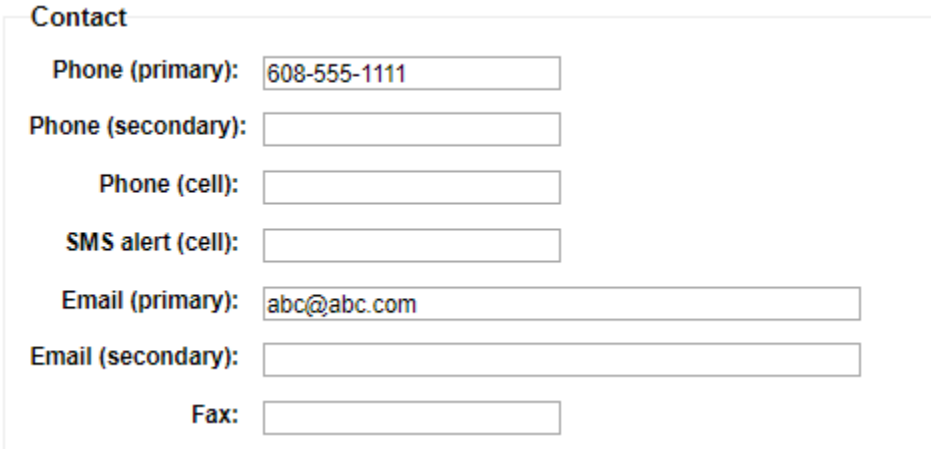
Set up their contacts like this:

Set up their Messaging Preferences like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☑	☐	☐	☐	☑	☐	☐	☑
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☐	☐	☐	☑	☐	☐	☑
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

Patron wants -
Hold notification: Phone call
Overdue notices: Email

Set up their contacts like this:

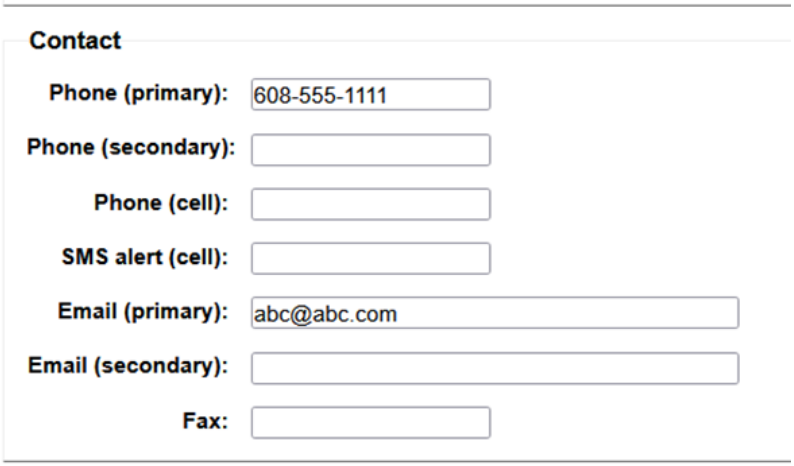


Set up their Messaging Preferences like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☐	☐	☐	☐	☐	☑	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

Patron wants -
Hold notification: Text
Overdue notices: Email

Set up their contacts like this:

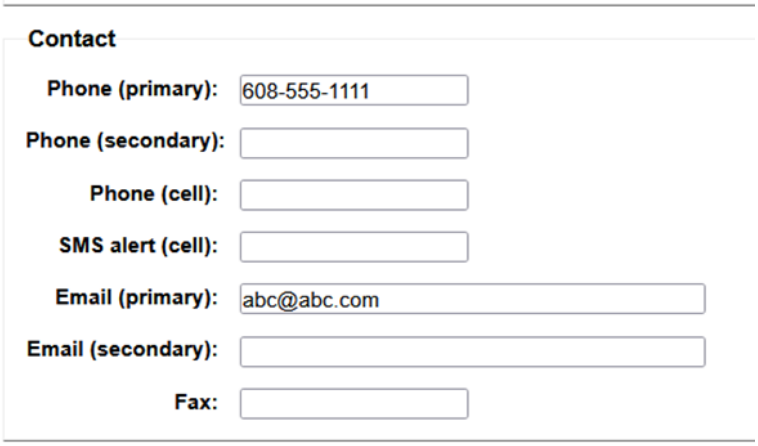


Set up their Messaging Preferences like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☐	☐	☐	☐	☑	☐	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

A patron that does not want Hold Filled notifications will still receive Overdue and Billing notices, via Email or Print.

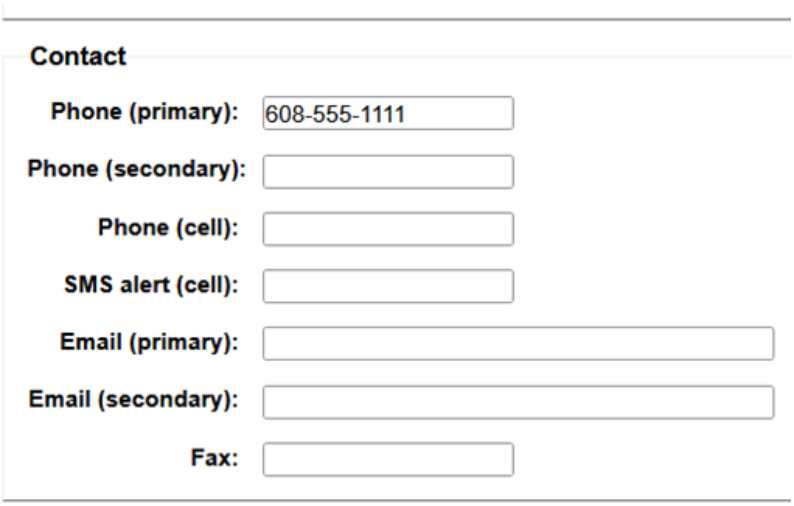
Overdue notices: Email



Their Messaging Preferences will look like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

Overdue notices: Print



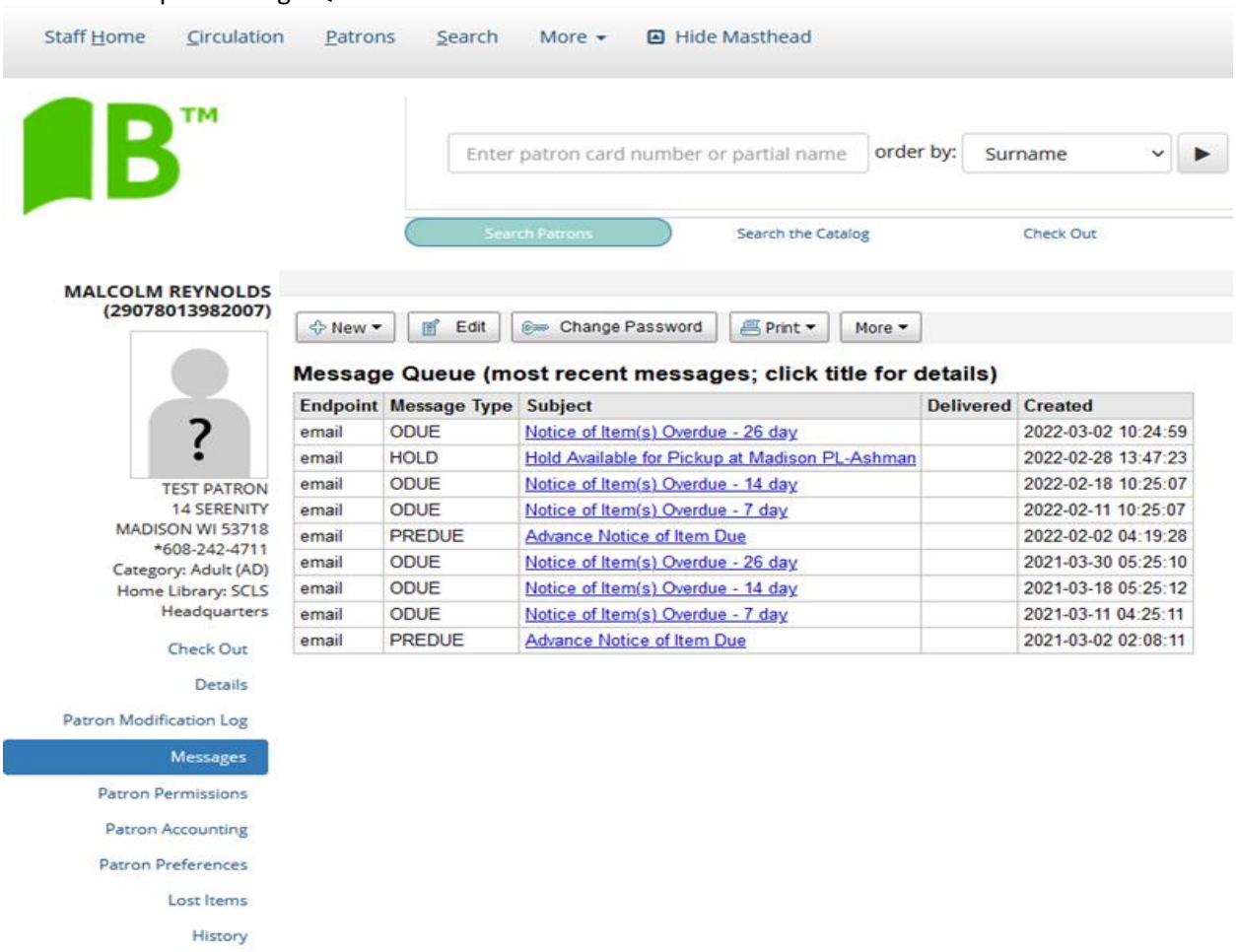
Set up their Messaging Preferences like this:

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	TTtext	TTvoice	Digest
Announcements									
General letter	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
General message	Notification	☐	☐	☐	☐	☐	☐	☐	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Circulation/Borrowing									
Advance Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☑ *	☐	☐	☐ *

D. PATRON MESSAGE QUEUE

The Messages link in the patron record is a history of notices sent to the patron. It is a quick way to verify whether or not a notice was sent to a patron, the format in which it was sent and what information the message was delivering. **Message are removed from the patron's Message Queue after 120 days.**

Here is a sample Message Queue screen:



Endpoint	Message Type	Subject	Delivered	Created
email	ODUE	Notice of Item(s) Overdue - 26 day		2022-03-02 10:24:59
email	HOLD	Hold Available for Pickup at Madison PL-Ashman		2022-02-28 13:47:23
email	ODUE	Notice of Item(s) Overdue - 14 day		2022-02-18 10:25:07
email	ODUE	Notice of Item(s) Overdue - 7 day		2022-02-11 10:25:07
email	PREDUE	Advance Notice of Item Due		2022-02-02 04:19:28
email	ODUE	Notice of Item(s) Overdue - 26 day		2021-03-30 05:25:10
email	ODUE	Notice of Item(s) Overdue - 14 day		2021-03-18 05:25:12
email	ODUE	Notice of Item(s) Overdue - 7 day		2021-03-11 04:25:11
email	PREDUE	Advance Notice of Item Due		2021-03-02 02:08:11

Columns:
Endpoint – how the notice was delivered [email, tttxt(text), ttvox(voice)]
Message Type – the type of notice
Subject – Subject line from the notice sent
Delivered – when the notice was sent (ONLY populated for Email notices)
Created – date and time notice was generated

Each Message will be hyperlinked to a text version of the message. You will be able to see the text of each message, including text and voice messages.

Both the text and voice messages are provided in the format in which they are delivered to the Talking

Tech server, but you will be able to read patron and item information.

Here are some examples:

Text message

Message Details

Endpoint	tttxt
Message Type	HOLD
Subject	Hold Filled
Content	"T","EN","RESERVE","1","29078017854129","","IVAN","VORPATRIL","","holiversen@scls.info","SKC","SKC","MID","39078099307358","2019-11-27","Penric's fox :-",""
Delivered	
Created	2019-11-27 08:52:53

Voice message

Message Details

Endpoint	ttvox
Message Type	HOLD
Subject	Hold Filled
Content	"V","EN","RESERVE","1","29078007446985","","KAREN","EXPIRED","*608-266-6069","","SCA","SCA","ACL","39078078672699","2019-11-20","Marvel's The Avengers (DVD)",""
Delivered	
Created	2019-11-20 11:57:20

Email message

Message Details

Endpoint	email
Message Type	ODUE
Subject	Notice of Item(s) Overdue - 7 day
Content	608-246-7970 SCLS Headquarters 4610 S. Biltmore Ln. Madison, WI 53718 IVAN VORPATRIL 1515 VOR BORE DR MADISON WI 00006 Notice of Overdue Item(s) - 7 day 29078017854129 Library records show the following item(s) overdue. Please return them soon so that others may borrow them, and to avoid further charges. If you would like to renew your items, please log into our catalog at https://www.linkcat.info/ Call your local library if you have questions regarding this notice. 10/25/2019 11/08/2019 39078044328277 Callahan's con / Robinson 33.95 Thank you for your prompt attention to this matter. If you received this notice via email it was sent from a notification-only address that cannot accept incoming mail. Please Do Not Reply to this message but contact your local library directly.
Delivered	2019-11-15 01:59:05
Created	2019-11-15 01:12:11

E. NOTICE DEFINITIONS

1. Hold Available for Pickup

When an item on hold for a patron at your library is checked in at the patron's pickup library, it traps the item for their hold and generates:

a. A message on their Check Out screen stating that there is a "Hold Waiting" for the patron, and
b. A notice that is delivered, based on the patron's choice of delivery method.
    a. Emailed Hold Filled notices are generated and delivered every hour. The notice will be delivered even if the item is checked out to the patron before the notice is scheduled to be delivered.

2. Hold Expired

Not in use at this time. This notice is generated when Unfilled Holds expire after a number of months or years, according to a global system preference. We do not expire Unfilled Holds.

3. Hold Canceled

When a filled or unfilled hold for a patron is canceled by the patron or a staff person OR an unfilled hold is canceled because the bibliographic record is deleted:

a. An entry for the canceled hold(s) will appear immediately in the patron's Hold History/Canceled Holds screen.
b. A notice is generated **if the patron has that option checked** in their Patron Messaging preferences:
    i. Email: if the patron has SELECTED THE HOLD CANCELED MESSAGING PREFERENCE AND has an email address in their primary email field, an email notice with the title "Hold on <title> - canceled" is immediately generated. These email notices are then delivered on the hour (8:30, 9:30, 10:30 etc.) after the action and sent to the patron's primary email address.
    ii. Phone: Talking Tech does not deliver these notices.
    iii. Print: if the patron does not have an email address in their patron record, a print notice with the title "Hold on <title> - canceled" is generated and added to the Print Message queue.

4. Overdue

Overdue notices are a default notice for ALL Patron Categories. Parameters are set in the Notice/status triggers for each library. The same notice template is used for email and print notices. Overdue notices are "sent" from the library at which the patron checked out the items.

Overdue Notice generation:

i. For libraries that send our three Overdue notices:
    - First notice is sent at 7 days overdue, with a subject line "Overdue – 7 day"
    - Second notice is sent out at 14 days overdue, with a subject line "Overdue – 14 day"
    - Third notice is sent out at 26 days overdue, with a subject line "Overdue – 26 day"

ii. For libraries that send out two overdue notices:
    - First notice is sent out at 14 days overdue, with a subject line "Overdue – 14 day"
    - Second notice is sent out at 26 days overdue, with a subject line "Overdue – 26 day"

See the OVERDUE NOTICE TRIGGERS section below for more details.

Overdue notices are delivered ONLY by Email or Print. See the NOTICE DELIVERY OPTIONS section above for patron record settings.

i. Phone: Talking Tech is not set up to deliver notice of overdue items.

TIP: If the patron renews the item after receiving a First Overdue notice, and allows the item to become overdue again, they will receive another First Overdue Notice for that same item.

5. Advance (pre-overdue) notice

Advance notices are optional per patron record.
The following notices are generated.

Email notices:

- If the patron has an email address in their patron record/primary email field, an email notice with the subject line "Advance Notice of Item Due" is generated by the evening cron job and sent to that email address the next morning.
- NOTE: if you delete a patron's email address and do not "un-check" the pre-overdue notice messaging preference, this notice will still be generated and then sent to the Print Messages table.

Phone: Talking Tech does not deliver Advance notices.

Text: Talking Tech does not deliver Advance notices.

Print notices: print notices should not be generated for Advance notices because of the limited time frame.

The cron/script for this notice type runs every day. If for some reason the cron is interrupted, the notices do not get included in the next day's run. These notices are only calculated based on the current date.

TIP: Patrons will continue to receive Advance notice of overdue items as long as they are able to renew the item(s).

6. Billing notices (aka Notice of Unresolved Charges aka Outstanding fines)

Billing notices are generated and either emailed to the patron or delivered to the Print Messages table.

a. Billing notice text is set up on a per library basis in order to provide different notice text for:
   i. Libraries who have contracted to use UMS, a collection agency, and
   ii. Libraries that have no contract with UMS but still provide a Billing Notice.
b. Billing notices are generated when a patron's balance has reached $50.00 or more.
   i. Email Notices: Emailed to the patron. Text of the notice can be seen in the patron's Messages Queue.
   ii. Print Notices: When patrons do not have an email address in their patron record (Email (primary), the Billing notices will be sent to the Tools/Print Messages table.
c. If a library has contracted with UMS, a collection agency, the following will be true:
   i. The text on their Billing Notice will reflect the possibility that the account may go to a collection agency if the charges are not resolved.
   ii. The debt collect report script *runs every night* and delivers new submissions and updates on accounts every day of the week. Contact SCLS ILS staff to have your email address account added to the script in order to receive the daily, emailed reports.
   iii. Internal settings provide a 31 day grace period between the day the patron is eligible to be included on the UMS report and the day they are included on the report.

A workflow example for a patron with an email address:

- Patron places hold on item (worth $100.00) for pickup at Library A.
- Item is checked in at Library A.
- Hold Available email notice generated and sent to patron.
- Patron checks out item.
- Item becomes overdue.
- First Overdue notice is generated and emailed to patron 14 days after item becomes overdue.
- Second Overdue is generated and emailed to patron 26 days after item becomes overdue.
- Overdue item converts to “Lost” status at 29 days overdue.
- Item replacement price of $100.00 is assessed on the patron’s record and any accruing overdue fines are ‘credited.’
- Since the balance is more than $50.00, a Billing Notice is generated and either emailed or sent to the Print Messages table.
- If sent to the Print Messages table, library prints out the notice and mails it to the patron.
- If the checkout library is contracted with UMS and the charge remains unpaid, the debt collect script will flag this account as eligible and start the 31 day grace period.
- If the patron returns the items before the end of the grace period, the record will not be submitted to UMS.

F. OVERDUE NOTICE TRIGGERS

Overdue Notices:
Some libraries send out two overdue notices to their patrons (at 14 & 26 days overdue); some send out three (at 7, 14, & 26 days overdue).

The First Overdue notice is generated either 7 days or 14 days after the item becomes overdue, depending on which trigger your library has chosen. This is a per library setting, based on Patron Category.

First | Second | Third

By patron category:

	Delay	First Letter	Debar
Adult	7	Overdue - 7 day	☐
Adult Staff	7	Overdue - 7 day	☐
Bulk Loan	7	Overdue - 7 day	☐
Fine Free Org.	7	Overdue - 7 day	☐
Homebound	7	Overdue - 7 day	☐
Inter Library Loan	7	Overdue - 7 day	☐
Internal	7	Overdue - 7 day	☐
Juvenile	7	Overdue - 7 day	☐
LINK Express	7	Overdue - 7 day	☐
Limited Use	7	Overdue - 7 day	☐
Limited Use - Juvenile	7	Overdue - 7 day	☐
Non-Reciprocal	7	Overdue - 7 day	☐
Outer Library Loan		No notice	☐
Organization	7	Overdue - 7 day	☐
Senior	7	Overdue - 7 day	☐

First | Second | Third

By patron category:

	Delay	First Letter	Debar
Adult	14	1st Overdue Notice	☐
Adult Staff	14	1st Overdue Notice	☐
Bulk Loan	14	1st Overdue Notice	☐
Fine Free Org.	14	1st Overdue Notice	☐
Homebound	14	1st Overdue Notice	☐
Inter Library Loan	14	1st Overdue Notice	☐
Internal	14	1st Overdue Notice	☐
Juvenile	14	1st Overdue Notice	☐
LINK Express	14	1st Overdue Notice	☐
Limited Use	14	1st Overdue Notice	☐
Limited Use - Juvenile	14	1st Overdue Notice	☐
Non-Reciprocal	14	1st Overdue Notice	☐
Outer Library Loan		No notice	☐
Organization	14	1st Overdue Notice	☐
Senior	14	1st Overdue Notice	☐

The Second Overdue notice is generated either 14 days or 26 days after the item becomes overdue, depending on which trigger your library has chosen. This per library setting, based on Patron Category.

First | Second | Third

By patron category:

	Delay	Second Letter	Debar
Adult	14	Overdue - 14 day	☐
Adult Staff	14	Overdue - 14 day	☐
Bulk Loan	14	Overdue - 14 day	☐
Fine Free Org.	14	Overdue - 14 day	☐
Homebound	14	Overdue - 14 day	☐
Inter Library Loan	14	Overdue - 14 day	☐
Internal	14	Overdue - 14 day	☐
Juvenile	14	Overdue - 14 day	☐
LINK Express	14	Overdue - 14 day	☐
Limited Use	14	Overdue - 14 day	☐
Limited Use - Juvenile	14	Overdue - 14 day	☐
Non-Reciprocal	14	Overdue - 14 day	☐
Outer Library Loan		No notice	☐
Organization	14	Overdue - 14 day	☐
Senior	14	Overdue - 14 day	☐

First | Second | Third

By patron category:

	Delay	Second Letter	Debar
Adult	26	2nd Overdue Notice	☐
Adult Staff	26	2nd Overdue Notice	☐
Bulk Loan	26	2nd Overdue Notice	☐
Fine Free Org.	26	2nd Overdue Notice	☐
Homebound	26	2nd Overdue Notice	☐
Inter Library Loan	26	2nd Overdue Notice	☐
Internal	26	2nd Overdue Notice	☐
Juvenile	26	2nd Overdue Notice	☐
LINK Express	26	2nd Overdue Notice	☐
Limited Use	26	2nd Overdue Notice	☐
Limited Use - Juvenile	26	2nd Overdue Notice	☐
Non-Reciprocal	26	2nd Overdue Notice	☐
Outer Library Loan		No notice	☐
Organization	26	2nd Overdue Notice	☐
Senior	26	2nd Overdue Notice	☐

If a library sends out three Overdue notices, the third notice is generated 26 days after the item becomes overdue. This is a per library setting, based on Patron Category.

First | Second | Third

By patron category:

	Delay	Third Letter	Debar
Adult	26	Overdue - 26 day	☐
Adult Staff	26	Overdue - 26 day	☐
Bulk Loan	26	Overdue - 26 day	☐
Fine Free Org.	26	Overdue - 26 day	☐
Homebound	26	Overdue - 26 day	☐
Inter Library Loan	26	Overdue - 26 day	☐
Internal	26	Overdue - 26 day	☐
Juvenile	26	Overdue - 26 day	☐
LINK Express	26	Overdue - 26 day	☐
Limited Use	26	Overdue - 26 day	☐
Limited Use - Juvenile	26	Overdue - 26 day	☐
Non-Reciprocal	26	Overdue - 26 day	☐
Outer Library Loan		No notice	☐
Organization	26	Overdue - 26 day	☐
Senior	26	Overdue - 26 day	☐

G. BOUNCED EMAIL NOTICES

If any email notices bounce, the notice is redirected to the checkout library's bounced email address/account (email address in the Library and Groups set up for that library). If that delivery fails, the bounced email will go to the Bibliovation Administration email address.

Each library should be monitoring its library's bounced email account for returned notices **at least once a week.**

If an email notice is returned to your library's bounced email mailbox, it means the patron did not receive it, and your library will have to take some action to notify the patron.

Every ILS library should have established procedures for handling their bounced email messages. Some suggestions to enhance your procedures:

- Assign 1-2 staff people to be responsible for reviewing this account at least once a week, depending on volume.
- If it is a bad address, staff should erase the current email address in the patron's record, inactivate the holds and enter an "Email Correction Requested" message in the patron's Check out screen.
- If the notice was for a Hold, you can notify the patron in an alternative manner: either telephone the patron, or print out the rejected message and mail it.
- If the notice was for an overdue, you can print out a screen shot of the notice from the patron's Message Queue and mail it to their postal address.

- If the bounced email has been stripped of all identifying information (name, patron barcode), search the "bad" email address using the Advanced Search Options on the Patron page.

Every ILS library should have their Office 365 mailbox set up, ready to receive bounced email messages. If you don't know if this was done for your library, contact the Help Desk at 608-242-4710. If you are having a problem with large amounts of spam being sent to your library's bounced email address, please go to our Office 365 FAQ webpage and read the section titled "How should I handle Junk mail?"

H. RELATED PROCEDURES

1. Troubleshooting reported problems with phone hold notices

If patron is getting phone hold notices and there is nothing on the hold shelf:

- Ask patron when the call was received.
- Did they pick up and check out a hold that morning? Once Talking Tech receives the Call List from Bibliovation at 6:00 pm each night, the calls to be made are set.
- Does anyone else have permission to pick up their items? They may have come in and checked them out through Hold Pickup Authorization.
- Could the message about holds available have been for someone else in their household?
- Might the message have been an older call for holds to pick up that was not erased from their messaging system/answering machine?
- For staff: Is the Hold Waiting message still on the Check Out screen of their record?
    - If so, check shelves for item in case it was misfiled.
    - Also, check to see if it was checked in for the patron before any damage was noticed, etc. and the item was re-routed before the hold could be canceled and re-placed for the patron.
- Is the item checked out to your library's Hold Shelf card?
- Was the item sent back to the owning library with a problem item status?

If patron is getting phone hold messages for items that they did not place on hold:

- Does someone else (not a family member) have this number in their record? Check to see if another patron record has this number, possibly in error.
    - Access the Main Patron screen
    - Click the "Show Advanced Search Options" hyperlink.
    - Enter the phone number in the Contact section, Phone (primary) field.
    - Scroll down to the bottom of the patron and Click the Search Patron button.
    - Review resulting records, if any.

If patron is not receiving phone calls:

- Is their phone number correct? Confirm the number and correct it if it is the wrong number.
    - If the phone number is correct, there may be some hidden characters in the field that prevent i-tiva from calling the number. Follow these steps to test:
        - Select the phone number field.
        - Delete the data in the field by highlighting the data in the field and clicking the Delete button on your keyboard.
        - Save the change.
        - Re-enter the phone number in the field without spaces (particularly at the end) using this format: xxx-xxx-xxxx
        - Save the change.
        - Ask the patron to generate another hold so you can test the phone number re-entry.
- Is there someone else in their household who may have listened to the message(s) and forgot to tell this patron?
- Have they or anyone in their house recently hung up on what they thought was a computerized telemarketer message?
- Do they have Telezapper? Telezapper has been known to hang up on our automated phone hold notices.
- What kind of answering machine do they have (digital or analog) and is the message a long or short one? i-tiva/Harriet pronounces the opening message twice in order to accommodate answering machine messages of different lengths. If the answering machine is expecting a response at the point between the two initial messages, the answering machine may hear silence, and will hang up. A hang-up is counted as a completed call, and the patron will not be called again.
- If this is a recent problem, have they recently changed the length of their answering machine message? See above.
- **Do they have voice mail? Do they have voice mail with individual mailboxes? Is it interactive?** If yes to these question, i-tiva/Harriet is unable to react to the variety of choices presented by interactive voice messaging or voice mailbox options. The call will continue over the interactive messaging, and the patron will not be called back.
- Did they receive a call from one of these numbers? If their phone has caller ID, it will show up as "The Library". **NOTE: These numbers are dial-out ONLY. i-tiva will NOT answer incoming calls to these numbers. Patrons should use the phone numbers provided publicly for calling into i-tiva for telephone circulation transactions.**
    - Call-out numbers: 608-242-4702 through 608-242-4707.

Ask SCLS staff to review the Call list.

2. Troubleshooting reported problems with Email Notices

If a patron reports that, they are not getting notices via email:

- In their patron record,
    - Check the Email (primary) field and confirm that their email address is valid.
        - If they have recently changed their email address, completely wipe the field and re-enter the address carefully. An accidental key stroke may have included a "hidden character".
    - Check their Messages tab and confirm that they have gotten notices in the past.
        - Are the recent notices that they state they did not receive listed in this tab?
        - If yes, the notices may have been stopped by their email provider, may be in their Junk or Spam folders or may be in your library's bounced email account.

- Check to make sure that their emails are not included in your library's bounced email account (See Part G in this Section). Your library should be checking its bounced email account at least once a week. See the instructions at the end of this document.

- Who is their email provider? In the past, both hotmail and yahoo have been known to bounce our email notices. Hold emails notices go out as individual notices, once per hour. If the patron has multiple items checked in at one pickup location in one day, that number of emails FROM the same location TO the same location can trigger a spam alert in the email provider's system. The patron will have to contact their email provider and request that notices from your library's domain (the info after the @ symbol in your email address) be allowed through.

- Has the patron recently updated their filters/security in their email account? Do they know if their email provider has? See above problem and fix.

- If the patron is not getting their email notices AND the bounced notices are not showing up in your bounced email account, the patron's email provider may be "junking" our notices as spam. If this happens, the emails do not get bounced back to us and the patron is never notified that an email was junked. The patron will have to contact their email provider and request that notices from your library's domain be allowed through.