Section XIII Messaging preferences, Messaging Queue and Notices

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A. Messaging Preferences

Messaging preferences determine what notices are sent to a patron in which format. Patrons start with default preferences based on the type of Patron Category used for their patron record. Staff will make changes to patron record based on the individual needs of the patron.

Patron messaging preferences

	Days in advance	Email	Digests only?
Item Checkout	-	☐	-
Item DUE	-	☐	☐
Hold Cancelled	-	☐	-
Hold Filled	-	☑	-
Item Lost	-	☐	-
Item Check-in	-	☐	-
Advance Notice	0 ▼	☐	☐

Save   Cancel

Columns:

Days in Advance – only for use with the Advance Notice.

Email –**means NOTIFY**. Click the radio buttons for the types of notices the patron wants to get. How the notices are sent is determined by setting in the patron record. See Part C, Notice Types, for details below.

Digests only – LIMITED AVAILABILITY - Click this button so that the patrons receive one notice per day, rather than several notices per day. This option is not currently available for email Hold notices

Types of messages/notices

- Item Checkout: NOT FULLY TESTED OR FORMATTED. Email only. If checked, patron will receive email notification of items checked out to their record.
- 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 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.
- Hold Canceled: Email or print only. If checked, notice that a hold for the patron was canceled will be generated.
- Hold Filled: Email, print, phone 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.
- Item Lost: NOT FULLY TESTED OR FORMATTED. Email only. If checked, patron will receive a message
- Item Check-in: NOT FULLY TESTED OR FORMATTED. Email only. if checked, a patron can receive email notification of the check in of their returned items.

- Advance Notice: Email only. If checked, an automatic email notice will be generated by the system reminding the patron about items due; generated **two or more** days prior to the due date, depending on the "Days in Advance" selected. **DO NOT USE** if patron has selected 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.

Notice FAQ for library staff
<u>Default settings</u>:
- Overdue notices: all patrons receive Overdue notices, either print or email. This is a global setting for every patron in each Patron Category.
- Hold Filled notices: Hold Filled notices are a Patron Category default setting for all patron categories except ILL. This setting can be modified per individual patron.
- In the patron's Messaging preferences; the "Email" column determines whether or not that patron is to be notified for that particular type of message. Currently, only staff have the ability to change these preferences for the patron.
- ALL Billing Notices are generated as paper notices ONLY.

B. Notice delivery systems:

Email hold (and other) notices:
If a patron wants to receive all notices via email, they must have the following setup in their patron record:
Phone (primary) field = *phone number or blank. The asterisk prevents phone hold notices from being generated.
Email (primary) field = valid email address
Patron Messaging preferences:
> Hold Filled = checked
> Advance notice = select 2 for Days in Advance, check the Email <should read Notify> column and the Digests Only column if the patron would also like to receive pre-overdue notices.

- Patrons will receive all notices except Billing Notices via their email account. Only patrons with an email address in their Email (home) field can receive Advance Notices (pre-overdues). The default for the pre-overdue notice is set to 2 days.
- Email notices are generated every half hour throughout the day.
- Currently, only the Advance Notices are in digest format. This means the each hold checked in at the pickup location and each overdue notice will generate an individual notice. This is on the list for change in future development.

Phone Hold notices:

If a patron wants to receive their Hold Filled messages via telephone (Talking Tech) and all other notices in paper form, they must have the following setup in their patron record:

Phone (primary) field = valid phone number
Email (primary) field = blank
Patron Messaging preferences:
>   Hold Filled = checked

- As holds are checked in a the pickup library, Phone Hold notices accumulate throughout the day to one file.
- At the end of each day, Koha "checks" to see if the holds have been filled (checked out) before sending the file of accumulated notices to the Talking Tech server
- The Phone Hold Notice calls are made the next day.
- The Patron may still receive a phone hold notice AFTER they have checked out the item, if they check out the item early in the day they are scheduled to receive the call OR if they check out the item on a Sunday, a day that i-Tiva does not make phone calls..
- These patrons will receive print Overdue and Billing notices (Notice of Unresolved Charges)
- Current Problems: no record of the phone hold notice is recorded in the patron's Messaging tab – staff have to go to the i-tiva reports on the print directory site to research failed calls.

Text hold notices:

If a patron wants to receive their Hold notices via text messaging and all other notices in paper form, they must have the following setup in their patron record:

***Phone (primary) field* = "T1-valid phone number" (e.g. T1-608-555-1212)**
Email (primary) field = blank
Patron Messaging preferences:
>   Hold Filled = checked

- As holds are checked in at the pickup library, Text Hold notices accumulate throughout the day to one file.
- At the end of each day, Koha "checks" to see if the holds have been filled (checked out) before sending the file of accumulated notices to the Talking Tech server
- The Text messages are sent the next day.
- The Patron may still receive a text message AFTER they have checked out the item, if they check out the item early in the day they are scheduled to receive the text OR if they check out the item on a Sunday, a day that i-Tiva does not make phone calls or send text messages. These patrons will receive print Overdue and Billing notices (Notice of Unresolved Charges)

- Current Problems: no record of the text message is recorded in the patron's Messaging tab – SCLS staff have to access reports on the i-tiva server to research failed texts.

Print hold notices:

If a patron wants to receive all notices in print form), they must have the following setup in their patron record:

Phone (primary) field = *phone number (e.g. *608-555-1212) or blank. The asterisk prevents phone hold notices from being generated.

Email (primary) field = blank

Patron Messaging preferences:

      Hold Filled = checked

- Print notices accumulate throughout the day and are delivered by a cron** job to our Koha print directory. Each library may have multiple print files produced daily for the different types of notices. Specific instructions for printing notices are located in Part D of this section.

DEFINITION: a cron or a cron job is what we call scheduled report scripts and/or processes that are run on a regular basis.   Some are run hourly (refresh holds queue, process message queue) and some run once in a 24 hour period, usually at night (notices, convert long overdue to lost, etc). Also called "scripts" or "overnights".

No hold notices:

If a patron does not want to receive any Hold Filled notices, they must have the following setup in their patron record:

Phone (primary) field = *phone number (e.g. *608-555-1212) or blank. The asterisk prevents phone hold notices from being .

 Email (primary) field = blank

Patron Messaging preferences:

      Hold Filled = **UNchecked**

- These patrons will still receive print overdue and Billing notices (Notice of Unresolved Charges).

C. Messaging Queue

The Messaging tab 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 and the format in which it was sent. See Part C Notice Types for detailed information on the type and format of notices sent to patrons. Note: phone (and text) notices are not included in this queue. See Part C, Notice Types, Holds Available for Pickup, (b) (i) for details.

Here is a sample Messaging Queue screen:

Message Queue

Type	Subject	Status	Time Prepared
print	Hold Available for Pickup at SCLS Headquarters	sent	2011-01-12 05:30:01
print	Hold Available for Pickup at SCLS Headquarters	sent	2011-01-12 05:30:01
print	Hold Available for Pickup at SCLS Headquarters	sent	2011-01-12 05:30:01
print	Hold Expired	sent	2011-01-12 05:30:01
print	Hold Available for Pickup at SCLS Headquarters	sent	2011-01-12 05:30:01
print	Hold Expired	sent	2011-01-12 05:30:01
email	Item Overdue	sent	2010-12-23 01:30:03
print	Hold Expired	sent	2011-01-12 05:30:01
email	Item Overdue	sent	2010-12-23 04:30:02
email	Items overdue	sent	2010-12-24 01:30:03
email	Items overdue	sent	2010-12-24 04:30:03
email	Items overdue	sent	2010-12-25 01:30:02
email	Items overdue	sent	2010-12-25 04:30:13
print	Hold Cancelled	sent	2011-01-12 05:30:01
print	Hold Cancelled	sent	2011-01-12 05:30:01
print	Hold Cancelled	sent	2011-01-12 05:30:01

Columns:
Type – the format of the notice
Subject – Subject line from the notice sent
Status – sent or pending
Time prepared – date and time notice file was generated

D. Notice types
Hold Available for pickup

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

1. A message on their Check Out screen stating that there is a "Hold Waiting" for the patron.
2. A notice is generated and delivered, based on the patron's choice of delivery method.
   a. Email: if the patron has an email address in their patron record/home email field, an email notice with the title "Hold Available for pickup" is immediately generated. These email notices are then delivered on the half hour (8:30, 9:30, 10:30 etc.) after checkin and are sent to the home email address listed in the patron's record.
      1. If the email bounces, the notice is redirected to the email address in the Library and Groups set up for that library. If the delivery to the library fails, the bounced email will go to the Koha Administration email address. Directions for Troubleshooting email notices are posted on the Circulation Workflow page.
   b. Phone: if the patron wants hold notices via phone, make sure they do not have an email address in their Hold email field. They need a valid phone number in their home phone number field.   The phone hold notice generates when these conditions apply and the notice is delivered via the i-tiva software.
      i. i-tiva attempts to call the patron's home phone number three times on the day after the hold is checked in at the pickup location and made available. If the phone notice is undeliverable after three attempts, there is no attempt the next day, nor is a paper notice generated. Phone notices do not appear on the patron's record. Until this development is completed, the daily phone results file will be posted to the i-Tiva notice folder on this website: http://scls-staff.ec2.liblime.com/~scls/itiva_results
      username: scls
      password: ReadABook
      Libraries can look up a patron's barcode in the files to see if the patron was contacted and they can also see which phone calls for their library were not successful.

Files will open in Excel with raw data from the i-tiva server. There are no plans to convert them at this time, since they are for reference only.

To adjust the Excel report so that it is more easily searchable:

- Right-click on the column heading for column A, which contains patron barcode data, and choose "Format Cells…"
- Under Category, choose Number. Set it to 0 decimal places to get all of the numerals in the patron barcode to display.
- Repeat this process for column B to get all of the numerals in the item barcode to display.
- Click on a blank cell so that you can search the spreadsheet.
- Use Control+F to open a find box. Enter the patron barcode here to search for the call information, after you have adjusted the report.
- **RESERVE1 is the code for a call for a hold available.** They are listed below the overdue and preoverdue notices on the Excel report.
- For more details on troubleshooting phone hold notices, see the Circulation workflows area of the ILS website.

c. Print: If the patron does not have an email address in their patron record/home email field and has settings that indicate that they do not want hold notices via the phone (an asterisk in their home phone field), a print notice with the title "Hold Available for Pickup" is generated and added to the file of print Hold notices by a nightly cron job. Instructions for notice printing are in Part D.

Hold Expired

 Not in use at this time.

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 item becomes unavailable**:**
1. An entry for the canceled hold(s)will appear immediately in the patron's Hold History/Canceled Holds screen.
2. A notice is generated, if the patron has that option checked in their Patron Messaging preferences:
   a. Email: if the patron has an email address in their patron record/home email field, an email notice with the title "Hold Canceled" is immediately generated. These email notices are then delivered on the half hour (8:30, 9:30, 10:30 etc.) after checkin and sent to the home email address.

i. If the email bounces, the notice is redirected to the email address in the Library and Groups set up for that library. If that delivery fails, the bounced email will go to the Koha Administration email address.

b. Phone: i-tiva does not deliver these notices.

c. Print: if the patron does not have an email address in their patron record, a print notice with the title "Hold Canceled" is generated and added to a file of print Hold notices by a nightly cron job. Instructions for notice printing are in Part D.

Overdue

Overdue notices are required 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 Notice generation:
The First Overdue notice is generated 14 days after the item becomes overdue. The Second Overdue notice is generated 26 days after the item becomes overdue. See Part E for more detail.

1. A message appears in the patron's check-out screen/Attention area stating that the patron has overdue items, generated by a nightly cron job.
2. The following notices are generated:
   a. Email notices:
      i. First overdue notice - if the patron has an email address in their patron record/home email field, an email notice with the title "First Overdue notice" is generated (based on the notice trigger) by the evening cron job and sent to that email address.
      ii. Second Overdue notice - if the patron has an email address in their patron record/home email field, an email notice with the title "Second Overdue notice" is generated (based on the notice trigger) by the evening cron job and sent to that email address.
      i. If either of these email notices bounce, the notice is redirected to the email address in the Library and Groups set up for that library. If that delivery fails, the bounced email will go to the Koha Administration email address.
   b. Phone: i-tiva is not set up to deliver notice of overdue items.
   c. Print notices:
      i. First overdue notice - if the patron does not have an email address in their patron record/home email field, a print notice with the title "First Overdue notice" is generated early each morning and is added to that library's folder of print notices as a separate file labeled **notices-yyyy-mm-dd.html**. Instructions for notice printing are in Part D.

        ii. Second Overdue notice - if the patron does not have an email address in their patron record/home email field, a print notice with the title "BILL" or "FINAL NOTICE" (depending on your library's preference) is generated early each morning and is added to that library's folder of print notices as a separate file labeled **notices-yyyy-mm-dd.html**. Instructions for notice printing are in Part D.

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.

TIP: If the patron checks out items from two different libraries on the same day, and all items have the same due date, the overdue notices from each libraries (check out locations) will include items from both check out locations.

Advance/pre-overdue

Advance notices are optional per patron record.

1. The following notices are generated.
   a. Email notices:
      i. If the patron has an email address in their patron record/home 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.
      ii. If this email notice bounces, the notice is redirected to the email address in the Library and Groups set up for that library. If that delivery fails, the bounced email will go to the Koha Administration email address.
   b. Phone: i-tiva does not deliver pre-overdue notices.
   c. Print notices: no print notices are generated for pre-overdue notices.
   d. The cron 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 continue to renew the item(s).

Billing notices (aka Notice of Unresolved Charges)

1. Billing notice text is set up on a per library basis in order to provide different notice text for:
   a. Libraries who have contracted to use UMS, a collection agency, and
   b. Libraries that have no contract with UMS but still provide a Billing Notice.
2. Billing notices are generated when a patron's balance has reached $50.00 or more. They are delivered exclusively by print.

a. Print Notices: A print notice is generated early each morning and is added to that day's file of print notices as a separate file labeled **amtduenotices-yyyy-mm-dd.html**. This file of notices is sent to the library's notice directory currently located at http://scls-staff.ec2.liblime.com/~scls/

b. The cron for this type of notice runs every day. If the script is interrupted or fails to run, the notices will 'accumulate' and will be included in the next day's file.

3. If a library has contracted with UMS, a collection agency, the following will be true:

a. 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.

b. The debt collect report script *runs every night* and delivers new submissions and updates on accounts every day of the week. Contact SCLS staff to have your email address account added to the script in order to receive the daily reports.

c. 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 + charge" status at 29 days.
- Item replacement price of $100.00 is assessed on the patron's record.
- Since the balance is more than $50.00, Billing Notice is generated and sent to library's print notice directory.
- Library prints out the notice and mails it to the patron.
- If the charge remains unpaid, the DC script is run at a designated interval and a collection notice (report) is sent to the agency.

E. Printing notices

Hold notices are found in the SCLS file share. All other print notices are found on http://scls-staff.ec2.liblime.com/~scls/<3 letter agency code>/. (Ex: http://scls-staff.kohalibrary.com/~scls/ber/)

Change the printer settings so the browser headers do not print:
If you do not wish to print the usual Firefox headers on the notices, turn them off before printing. You can print the notices from any PC that has access to a printer that can print 8.5"x11"paper. If you have both a laser and an inkjet printer, use the laser printer.

1. Double click on the regular Firefox icon on the desktop.
   a. Make sure you use the icon for your "regular" Firefox. Don't click on either the Koha Labels or the Koha Receipts icons.
   b. While using those icons will open Firefox, it will open it with different printer settings that will not work with the notice printing.
2. In Firefox, click on **File.**
3. From the drop down menu, click on **Page Setup**.
4. On the Page Setup window, click on the **Margins & Header/Footer tab.**
5. Near the bottom of the Margins & Header/Footer tab there is a Headers & Footers box. Inside that box are 6 drop down menus. **Click on the arrow at the right side of each drop down menu and choose --blank-- from the drop down menus**.
6. This will keep the normal URL, date and pages information from printing on the notices.
7. Click on **OK** to save the changes.
8. Once you have turned off the headers and footers, they will remain off unless you turn them on again.

Hold notices:
These are the notices of hold availability or hold cancellation. They are located on the SCLS file share separate from the rest of the print notices. **Note:** If your library is not open on certain days of the week, you will need to print the file for both the closed day and the next open day. For example, if your library is closed on Sundays, on Monday, January 30th, you will print the files dated 2012-01-29 and 2012-01-30. Also, for holiday weekends, be sure you print any files available for each date your library was closed in addition to the first date you are open.

To access the SCLS file share:
1. **Double click the Firefox icon** on the desktop. Use the icon that says Firefox. Do not use the Labels or Receipts icons.
2. Click on the **Start** button
3. Click on **Run**
4. Enter **\\sclfs01\Koha\notices** in the Open: line. Click OK.
5. This should open the Notices folder. Find and **double click on the folder for your agency**.

a. Once you've found the folder for your agency, you can create a shortcut on your desktop to go directly to this folder.

b. Click and hold on the small file folder icon in the Address bar at the top of the notice folder for your agency. The address in the bar should look like: \\sclfs01\Koha\notices\<library name> (Ex: \\sclfs01\Koha\notices\Lodi Library)

c. Drag the cursor to a blank space on your desktop and let go of the mouse button. This should put a shortcut on your desktop to the folder so you can skip steps 1-4 in the future and just click on the shortcut instead.

6. Inside the folder, look for the file called <library name>-YYYY-MM-DD.html with YYYY-MM-DD being the current date and double click on it. (Ex: McFarland – E.D. Locke Library-2011-04-19.html) **Note:** If the file doesn't show up in your Firefox window, Firefox is not set to your default browser. Right click on the file and choose "Open with" if you wish to use Firefox.

7. This will open the notice file.

8. Make sure the printer has your notice paper loaded.

a. You don't have to use perforated paper. The notices will print on regular 8.5"x11" paper. The perforated paper just makes them easier to fold and stuff into the envelopes.

9. Click on **File**

10. Choose **Print** from the drop down menu.

11. Make sure the correct printer is selected in the Printer Name at the top, Click **OK**

12. The notices should now print. If there was a problem when printing **th**e notices, you can reprint the notices, as long as no one deleted the notice file on the file share.

13. If there was a problem with the first print job, any notices from that attempt that actually printed will need to be shredded. *Notices contain confidential information so any that are not mailed to the patrons must be shredded.*

14. Notice files older than one week will be deleted automatically.

All other print notices:

The rest of the print notices are located on a website. The notice files are in folders for each library. There are two types of notices in each folder, the amount due (billing) and overdue notices.

To access overdue and billing notices:

1. Double click the Firefox icon on the desktop. Make sure you're not using either the receipts or labels icon.

2. Enter http://scls-staff.ec2.liblime.com/~scls/ in the address bar and hit Enter to load the page. Alternatively, you may wish to create a bookmark for this in your browser. Call either Help Desk if you need assistance in adding a bookmark.

3. Enter the following user name and password (case-sensitive).

      Username: scls

      Password: ReadABook

4. This opens the page entitled "Index of /~scls". Find and double click on the folder for your library. They are listed by agency code.

5. **There are two different file name sequences in each folder.** One is called amtduenotices-<date>.html and the other is notices-<date>.html. Find and click on

the file that has the **current date** at the end of the file name for both of those file sequences. The name format is yyyy-mm-dd.

Ex: amtduenotices-2012-01-09.html and notices-2012-01-09.html are the files for January 9, 2012. **Note:** If your library is not open on certain days of the week, you will need to print the file for both the closed day and the next open day. For example, if your library is closed on Sundays, on Monday, January 30th, you will print the files dated 2012-01-29 and 2012-01-30. Also, for holiday weekends, be sure you print the files available for each date your library was closed in addition to the first date you are open. If there was a problem when printing the notices and you reprinted the notices, any notices from the first attempt that actually printed will need to be shredded. *Notices contain confidential information so any that are not mailed to the patrons must be shredded.*

F. Overdue Notice triggers

Advance notices, otherwise known as pre-overdue notices, are triggered based on the individual Patron Messaging preferences. The setting for these email notices can be modified per patron record.

The First Overdue notice is generated 14 days after the item becomes overdue. This is a global setting per library account, based on Patron Category.

Delay is the number of days after an issue is due before an action is triggered.

If you want Koha to trigger an action (send a letter or debar member), a delay value is required.

Columns must be filled left to right: if the first column is blank, other columns will be ignored.

Select a library: Adams County Library

Rules for overdue actions: ACL

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	☐
Organization	14	1st Overdue Notice	☐
Senior	14	1st Overdue Notice	☐

The Second Overdue notice is generated 26 days after the item becomes overdue. This is a global setting per library account, based on Patron Category.

Delay is the number of days after an issue is due before an action is triggered.

If you want Koha to trigger an action (send a letter or debar member), a delay value is required.

Columns must be filled left to right: if the first column is blank, other columns will be ignored.

Select a library: Adams County Library ▼

Rules for overdue actions: ACL

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 ▼	☐
Organization	26	2nd Overdue Notice ▼	☐
Senior	26	2nd Overdue Notice ▼	☐