

NP – Notice production

1 Introduction

This manual describes how to set up notices for borrowers. Subjects covered include:

- setup and parameters
- functional implications
- production
- example scenario's

Because of the many parameters throughout the system, which are spread over various AFO's, setting up notice production the way the library wants it to operate can be a complex business. This manual attempts to give a guideline through the various AFO's involved.

The Circulation module allows you to determine how long items can be loaned to borrowers. If items are returned late you can determine whether an overdue notice should be sent, how many overdue notices are sent, and if a bill/invoice for the item is sent.

Other parameters determine whether a borrower is blocked or suspended when overdue notices are sent, and whether postage is charged for notices.

You can send notices to borrowers to tell them that a requested item is now available for pickup, or to recall items that are requested for another borrower.

The format for printing borrower names and addresses on notices is defined in AFO 482.

Parameters for defining notice formats are defined for each location and for each borrower category. You can copy a notice profile.

You can define profiles for printed notices. These include a general message that is displayed as part of the notice. Different messages can be determined for telephone messaging, SMS and email notices.

Please refer to the online help of the individual AFO's mentioned for detailed information.

Note

There is a non-interactive parameter that determines whether circulation notices are printed for the whole meta institution or on a per location basis. Consult Infor for more information.

2 Parameters

This section describes various base parameters, both mandatory and optional ones.

Please note

The parameters in AFO 481 are location dependant. When you have entered values for one location, you should copy the parameters for each new location. Parameters in AFO 482 are generally system-wide.

2.1 Contact methods

A general set of parameters called Contact Methods can be configured. It is more usual however to define the contact method for a borrower according to the following hierarchy.

- Contact method of individual borrower set in AFO 431
- Borrower category (via AFO 481 – notification contact method by borrower category)
- Circulation location (via AFO 481 – notification contact method by location)
- Circulation meta institution (via AFO 616 – Contact methods, first tab, button **Circulation**)
- System as a whole (via AFO 616, Contact methods)

That is, you may define contact methods for one or more specific borrower categories. If no contact method is defined for the category, then the system will attempt to find one defined for the circulation location. If this fails it will check to see if one is defined for your circulation institution and failing that will look at the system level entry. A system level entry **MUST** be defined as a fail-safe.

(In addition, you should note that the Circulation location setting is **ONLY** consulted if your system is configured for notice printing at the location (branch) level).

The settings by borrower category and/or location are accessed via AFO481/ Miscellaneous / Notification contact method.

You can also set a contact method for an individual borrower through AFO 431.

Checklist for setup:

- AFO 616 – Miscellaneous settings for notice output – Physical output formats: to define the various physical output formats such as Print, Email, SMS.
- AFO 616 – Miscellaneous settings for notice output – Borrower contact methods: to select a contact method as defined above for each type of notice that can be sent to borrowers
- AFO 616 – Contact methods – tab Borrower: to set a default contact method

Optionally:

- AFO 481 – Notification contact method by borrower category: to select a default contact method as defined above for each borrower category
- AFO 481 – Notification contact method by location: to select a default contact method as defined above for the current location
- AFO431 - Optionally a contact method may be assigned to an individual borrower record which overrides all other default settings.

2.2 Address parameters

The following parameters are related to display of borrower name and address details.

- AFO 482 - Borrower Name Setup. – Institution wide setting. In order to select the components for the borrower name you must first make them available in Borrower Definition Settings Identity (system wide settings). You can select components for printing on notices that are different from those you want to use for display.
- AFO 482 - Borrower Address SSP Print Setup: You can define up to 10 addresses for the borrower. Each of these addresses is given a name (i.e. Home Address, Address 2, Address 3, etc) and within each address, you can chose which fields are In use. Borrower Address SSP Print Set-up is used to set-up the way the address will be printed on all SSP notices and card format notices (overdue, reservations,

manual/automatic recalls). This type of set-up allows multi line address printing. (institution wide setting).

- AFO 482– Borrower Address Print Setup: This is used for all the other type of notices. In this set-up only three lines can be defined. The first line will be the street, the second line will be the city and the third line will be the postcode.
- AFO 482– Borrower Address Priority Setup: The Borrower address priority setup is used to determine which borrower address should be used for each system job.

There are also parameters related to the display of the library address:

- AFO617 – enter the address information for each Institution and location which populates the variable \$\$ADRES
- AFO 483 – Notices – Address options: to determine the contents of variable \$\$ADRES

2.3 Layout parameters

Layouts are defined in AFO 483. You have a choice between:

- card format: this offers not much flexibility and is designed for card type output
- SSP format (for printed letters): this gives more options to design letters to your own liking
- mailmerge (for printed notices based on a main document that is merged with the output): this gives you full control over not only layout, but also font type, font size, use of colours, logos etc.
- separate email texts
- separate SMS message texts

Notes

Not all formats are available for all types of notices. Therefore you will usually end up with a combination of the above options.

Some definitions offer a choice between general level, institution level and institution/location level. This means for instance you can define different email texts for each location.

2.4 Email

If you want to send notices via email you must of course define an output method for email in AFO 616 and the email texts in AFO 483.

You must also define specific parameters in AFO 651 – Email parameters. This includes a generic setting to allow for email output of notices.

2.5 SMS

If you want to send notices via SMS you must of course define an output method for SMS in AFO 616 and the SMS texts in AFO 483.

You must also have an SMS provider and define specific parameters for connecting in AFO 651 – SMS provider parameters.

2.6 No output

A "no-output" method as defined in AFO 616 can be used instead of Print as a catch-all method for the generation of the notices which have failed any other contact types for the method. This will override the standard default of if all else fails use PRINT. For example: If you have a method defined as email only and the borrower has no email address then the default is PRINT (when nothing else is defined), so the notice will end up in the Printed set. If the method is defined as email & no output and the borrower has no email address then the notice will end up in the No output set.

In AFO 483 you can also set a method of "No output". This means that the output will be ignored for regular AFO 452 runs by default. However this group is made available in the stored print files of AFO 452 so that they may be Optionally sent out as printouts if required (this gives a list of those borrowers who did not get notices or requested not to receive notices).

So the 616 is different from the 483 setting, because the latter effectively means "no output at all".

3 Functional implications

There are various other parameters related to notice production, as well as functional implications such as blocking borrowers based on notices sent.

3.1 Periods

For various types of notices you must determine after how many days they should be generated:

- AFO 481 - Default parameter settings. This parameter allows you to set various defaults, including number of days after which to generate overdues 1-4.
- AFO 481– Overdues and Courtesy notices. Use these parameters to determine (per borrower category) how many days past the due date an overdue notice is generated. The system can send up to 4 overdue notices. Optionally you can also define a period for courtesy notices to inform borrowers of items about to become overdue.
- AFO 481 – Invoices. In this section you can configure (per borrower category) if automatic invoices must be created for long overdue items and after how many days reminders for invoices must be generated.
- AFO 481 – Membership related – Expiring membership notification: define the number of days prior to expiry date the notice must be sent.

3.2 Other related parameters

There are various other parameters that may for instance result in online messages about notices sent or add additional charges because of notices sent.

- AFO 481 Miscellaneous – Circulation workflow – Loans – Loan invoices. You can determine if an invoice should be prepared for a borrower when an item is loaned.
- AFO 481 Miscellaneous – Circulation workflow – Printing – Miscellaneous – Automatic recalls. The system can print automatic recalls for reserved items. If you do not define this parameter then a recall notice will be sent immediately when a reserved item is overdue.
- AFO 481– Miscellaneous – Circulation workflow – Printing – Miscellaneous – Print recalls before reservations. When an item is reserved the system can send a recall notice to a borrower that has the item on loan past the due date, so that the item is returned quickly to satisfy the reservation. This parameter allows you to create a new print file of reservations only after the print file of recalls has been sent.
- AFO 481– Miscellaneous – Postage. The system can charge borrowers for sending overdue notices. Use these parameters to determine what is charged for each notice.
- AFO 481– Miscellaneous – Circulation workflow – Printing – Miscellaneous. There is a parameter that allows you to specify whether postage charges are based on borrowers home location or location producing notices.

- AFO 481 Miscellaneous – Circulation workflow – Returns – Display warning message for no. of overdues. This parameter specifies when the system should display a message in AFO 412 Returns about overdues sent.
- AFO 483 – Stored print file periods. Use this to specify the number of days print files must be stored OR how many files you wish to retain. This enables you to reprint files via AFO 452 if necessary.
- When using mailmerge, you also need to define at least one print processor and system printer in AFO 621
- AFO616 - An administrative charge may be assigned to the Physical output method when used for Overdue notices.

3.3 Blocks

Blocks can be applied if overdue notices or invoices have been sent:

- AFO 482 – Block borrowers. Borrowers can be blocked or suspended (blacklisted). Once blocked the borrower cannot use the library services except to return items or pay cash. The thresholds for blocks are set in AFO 482 Block borrowers. Only active types of block defined in AFO 481 are applied.
- AFO 481 – Miscellaneous – Circulation workflow – Borrowers – Active block types for borrowers. Defines which blocks are applied. The thresholds are defined in AFO 482 Block borrowers.
- Optionally this can be set separately (differently) for WebOpac, SelfService and Telephone messaging.
- AFO 481 Main circulation parameters – Overdues – Overdue: suspended
- AFO 481 – Overdues – Overdue: suspended. Borrowers can also be blocked automatically when overdue reminders are sent. The borrower can not use the library except to return items. This parameter allows you to determine (per borrower category) when a borrower becomes suspended.

4 Production

Depending on the format of the notice, production may be done in different ways.

- AFO 451 is used to generate the various types of notices

- AFO 452 is used to "print" the generated notices. Depending on output type the following happens when you select a print job:
 - printed cards and SSP type notices are produced via the standard dialog screen for generating output (usually to the printer)
 - email notices are sent immediately
 - mailmerge notices are sent to a print processor
 - SMS notices are sent to a queue. They are really sent via AFO 651 – SMS provider parameters

5 Sample scenarios

This section provides checklists for setting up different notice types to be sent in different ways.

5.1 Printed overdue letters

Checklist:

- AFO 616 – Miscellaneous settings for notice output – Physical output formats: define a format for Print.
Optionally an additional charge may be associated with the output format when used as an overdue notice.
- AFO 616 – Miscellaneous settings for notice output – Borrower contact methods: link the above defined format for Print to overdues 1-4 on the tab Overdues.
- AFO 482 - Borrower Name Setup. Optionally create a setting different from the display in the application.
- AFO 482 - Borrower Address SSP Print Setup: You can chose which fields are In use for each of the 10 possible addresses that you want to use for notices.
- AFO 482– Borrower Address Priority Setup: Use this to determine which borrower address should be used for sending overdues.
You can also choose to send these to the guarantor address.
- AFO 483 – Notices – Overdues (1-4): check the option SSP format

- AFO 483 – SSP format: define the layout for RAP1-4 for each borrower category
- Optionally define block parameters in AFO 481 and AFO 482.
- Optionally define postage parameters in AFO 481.
- Optionally define warning parameters for overdues in AFO 481.

5.2 Expiring membership letter by mailmerge

Checklist:

- AFO 616 – Miscellaneous settings for notice output – Physical output formats: define a format for Mailmerge.
- AFO 616 – Miscellaneous settings for notice output – Borrower contact methods: link the above defined format for Mailmerge to expiring membership on the tab Membership.
- AFO 481 – Membership related – Expiring membership notification: define the number of days prior to expiry date the notice must be sent.
- AFO 483 – Mailmerge parameters – Miscellaneous: enter the required details for Expiring membership.
- create a main document in your word processing package to be used for mailmerging and store this on the Vubis server
- AFO 483 – Mailmerge parameters – Notice sets: link the document created above to Expiring membership of the required Notice set
- AFO 483 – Mailmerge parameters – Notice sets by borrower category: link the Notice set that contains the definition for an Expiring membership notice to borrower categories.
- AFO 621 – Print processor maintenance: define at least one print processor.
- AFO 621 – Maintain system printer: define at least one system printer and link this to the print processor as defined above.

- Print processor: at least one PC must be configured to function as print processor. The word processing package will run 'permanently' on this PC. A macro will take care of the mailmerging process. There is a special .ini file (C:\Program Files\VubisSmart\VubisPrintProcessor.ini) associated with this process. Ensure the source documents are configured and available on the Print Processor workstation(s).
- AFO 482 - Borrower Name Setup. Optionally create a setting different from the display in the application.
- AFO 482 - Borrower Address SSP Print Setup: You can chose which fields are In use for each of the 10 possible addresses that you want to use for notices.

Note

This type of notice can ONLY be sent using mailmerge functionality.

5.3 Reservation pickup by Email

Checklist:

- AFO 616 – Miscellaneous settings for notice output – Physical output formats: define a format for Email.
- AFO 616 – Miscellaneous settings for notice output – Borrower contact methods: link the above defined format for Email to the reservation notice on tab Reservations.
- AFO 482 - Borrower Name Setup. Optionally create a setting different from the display in the application.
- AFO 482 - Borrower Address SSP Print Setup: You can chose which fields are In use for each of the 10 possible addresses that you want to use for notices.
- AFO 483 – Notices – Reservations: check the option SSP format
- AFO 483 – SSP format: define the layout for RESV for each borrower category
- AFO 483 – Email notice text – Reservations: determine the level at which emails must be generated, then define subject and text for each language.

- AFO 651 – Email parameters: enter the required information for sending emails.
- AFO 482 – Data to be entered, Data to be corrected: the field email address must be defined for the address group associated with the notice type.
- Borrowers need to have a valid email address.

5.4 Reservation pickup by SMS

Checklist:

- AFO 616 – Miscellaneous settings for notice output – Physical output formats: define a format for SMS.
- AFO 616 – Miscellaneous settings for notice output – Borrower contact methods: link the above defined format for SMS to the reservation notice on tab Reservations.
- AFO 483 – SMS format parameters: define contents of message for Reservation notice for each language.
- AFO 483 – SMS location names: define the short names for locations to be used in the SMS messages.
- AFO 651 – SMS Provider parameters: enter all the required parameters necessary for communication with your SMS provider.
- AFO 482 – Data to be entered, Data to be corrected: the field mobile phone number address must be defined for the address group associated with the notice type.
- Borrowers need to have a valid mobile phone number.

- **Document control - Change History**

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