

Email Hold Notices

Email from Christy Sayre to circulation contacts and directors, August 14, 2009

Over the past year we happily reached the point where all of our libraries are handling their own overdue and bill notices. This being the case, I wanted to remind each of you about which notices are being automatically emailed, and what makes it happen.

A little history—in late August of 2006, we let our member library directors know that we were beginning the service of sending ‘pre-overdue’ notices by email. This was partially a ‘do no damage’ test to make sure the set-up worked, which it did. We had been encouraging circ staffs to start collecting email addresses when registering or renewing patrons. Those patrons with a valid email address started receiving a notice to let them know that items were about to be overdue. We let that run for a bit over a month, then on October 16, we let our directors and circ staffers know that we would start including the regular overdue notices to go out by email that day. We are now coming up on 3 years of mailing overdue and preoverdue notices!

Now for some Q & A—

Q: Which notices get emailed?

A: Only overdue and pre-overdue notices get emailed. Both first and second (and third if you have them) overdue notices get emailed. These get emailed automatically if the patron has a single valid email in the email field of their record. Bills do not get emailed.

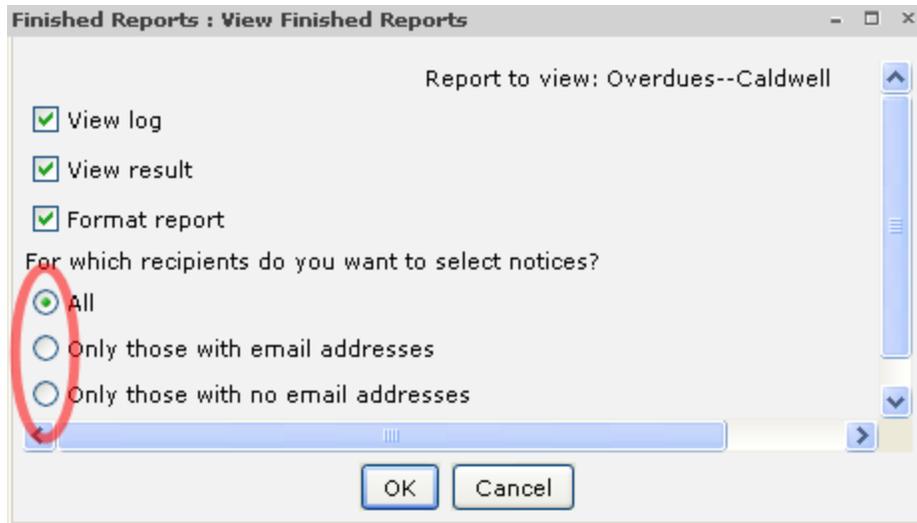
Q: What do we do when a notice bounces back to our library account?

A: The Unicorn server will keep trying to send any eligible mail to the user at the email address in their account, so the best thing to do is remove the address completely. If time permits, it would be very useful to copy the bad email address before you delete it, and paste it into the note field so that the next time the patron comes in, they can be alerted that their email bounced back to us. (Use Ctl-C to copy, Ctl-V to paste.) If this fails, at the very least, put a note in their record to verify their email address, so that it can be corrected the next time the patron is in.

Q: I thought the whole point of emailing notices was to save the library money by eliminating the amount of notices we have to send out by regular mail. But I think we are still printing and sending all of our overdue notices.

A: Emailing notices saves money and time. The fewer paper notices you have to handle, the better. And the emailed notices get to the recipient almost immediately!

The default setting on the overdue notices is set up to print all the notices in the file. If you choose a different setting, you can view and then print only those notices for patrons with no email address in their record:



Needless to say, it is up to each library to decide whether or when they should stop printing and sending all overdue notices. Any changes in the way your overdue notices are handled should be discussed with your director.

Email to PALS Plus staff from Christy 6/13/2011

Just a little documentation and some thoughts:

To enable any library notice to be emailed, as Symphony administrators, we need to check "Send notices automatically" in the Setup & Schedule section of the Reports Session wizard, and also check "Auto email to recipients with email addresses in their patron record" in the schedule section when setting up a report.

When viewing the finished report, Library staffs should note the following:

- Patrons who have email addresses in the EMAIL field of their address are automatically sent a notice when this report runs at 6:15am each morning (excluding specified weekend days).
- To view and print notices to all users who have NO email addresses, staff should select the Only Those Without Email Addresses session setting when viewing the notices.
- Staff can also choose to view only notices for those patrons WITH email addresses, in order to see which notices were emailed.

The hold pickup notices are scheduled to run early in the morning. This is the best time to run the notices--it gives every library the maximum amount of time to prep the holds.

The notice only capture holds that are already available--that means that items that will show up in a hold notice:

- 1) have been discharged anytime after 7AM the day before, or
- 2) have been unpacked from Velocity and trapped anytime after 7AM the day before.

I also just noticed that there's a setting for "Date Available" which means we can delay the hold notice by a day if a library really feels they're always going to need another day to get all their holds ready.