

Reminders and reservation announcements

With the BiblioMaker software, you can not only loan your titles, but also follow them up. In particular, you can automate sending reminders to readers who would have overdue loans.

This document explains how to set parameters for sending reminders or reservation announcements* and how to regularly send reminders or reservation announcements.

**A reservation announcement is a letter or an e-mail informing a reader that the reserved title is now available.*

In order to make this document easier to read, we describe here only the reminders. Reservation announcements are very similar to reminders and by reading this document, you can apply to reservation announcements the information pertaining to reminders.

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1. Setting up reminders

1.1 Entering addresses

If you want to be able to send reminders to readers, you have of course to enter their address. If reminders are sent by mail, enter their postal address (in a school, you could instead enter the class if you give the reminders to teachers) and if they are sent by e-mail, enter their e-mail address. Of course, you can enter both addresses.

If you enter the e-mail address, you then have to choose with the **Correspondence** radio button if the correspondence has to be sent by mail or e-mail.

E-mail	<input type="text" value="sonia.bonanomi@gmail.com"/>
Correspondence	<input checked="" type="radio"/> E-mail <input type="radio"/> Mail

1.1.1 Retrospective modification of correspondence settings

If you have already entered dozens of e-mail addresses, did not bother about the **Correspondence** setting (the value by default is «Mail») and would like to change this value in all addresses records containing an e-mail address, choose the **Action>Search** command in order to find these addresses records using the following criterion :

E-mail is different from [leave empty]

After you have found them, activate them, call the **Action>Apply>Correspondence per e-mail** and choose the **Yes** value.

Apply Addresses	
Target	<input type="text" value="Correspondence by e-mail"/>
Value	<input type="text" value="Yes"/>

1.2 Settings for automated reminders

Several settings make automatic sending of reminders easier.

In the Loans file, call the **Action>Options** command :

1.2.1 Reminders tab

Set up the delay before the first reminder and the delay between reminders. This delay can be identical or on the contrary different for each type of title.

Delay between reservation announcements	14	days
Delay before first reminder	7	days
Delay between reminders	7	days

1.2.2 Reminder fee tab

Define the reminder fee. The amount can be the same or different for each reader type and it depends if you send the reminders per mail or e-mail.

Level	Letter	E-mail
First reminder	1.00	0.00
Second reminder	2.00	0.00
Following reminders	3.00	0.00

1.3 Configuring sending e-mails

If you'd like to send reminders per e-mail, BiblioMaker must be set up in order to communicate with your mail server. This is why you must have at least one e-mail address.

In the software maintenance (accessible with the **File>Maintenance** command), choose the **Other>Configure sending e-mails** command. Create a new configuration record and enter the following parameters :

Field name	Explanation	Example
Title	Configuration name	<i>Loans service</i>
E-mail Address	E-mail address of the sender	loans@library.com
Complete name	Name of the sender	<i>Kensington Library</i>
Account name	Your account name	<i>loans</i>
Authentication with password	Please tick if the mail server requires a password	
Password	Password to connect to your mail server	<i>12345</i>
SMTP server	Mail server address	<i>mail.library.com</i>
SMTP port number	TCP port number (usually 25 for unencrypted communication, 465 or 587 for crypted communication)	<i>587</i>
Allow unsecured connections	Tick if applicable	
Responsible user	User account linked to the e-mail account. Only this user will be able to change the e-mail settings	<i>Administrator</i>
Mailing delay (sec.)	Delay between two sent e-mails. To be used only if the provider limits the number of sent e-mails per minute	<i>2.5</i>
Answer to	E-mail address an answer should be sent to	info@library.com
Carbon Copy	E-mail address of the library a copy of the e-mail will be sent to (to keep a trace of the sent e-mails)	loans@library.com
Blind Carbon Copy	E-mail address of the library a blind copy of the e-mail will be sent to (to keep a trace of the sent e-mails)	loans@library.com

If you don't know how to fill up this configuration dialog, please ask your IT manager.

Check the entered settings with the **Test** button.

You may enter several e-mail configurations, one for each person or one for each library department (acquisitions, loans, etc.).

1.4 Configuring sending reminder letters

You can define several settings for the reminders : how you will send them (par mail or e-mail), the reminder text and layout, if you will save the date and the number of reminders sent, etc.

You set up the criteria as follows : when in the list view of the Loans file, call the **File>Print** command. In the print dialog, select the **Reminders** print layout and click on the **Options** button. The setup dialog contains several tabs :

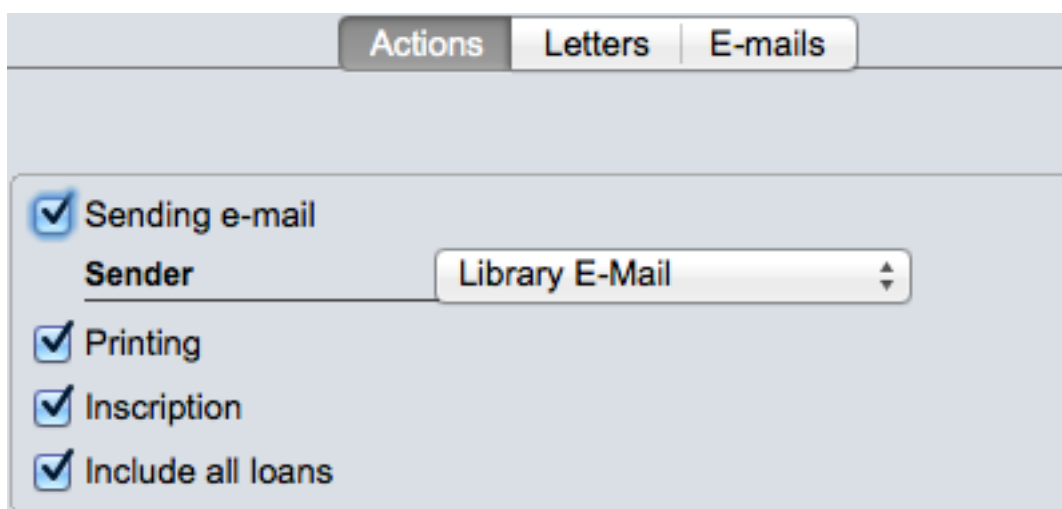
1.4.1 Actions tab

Tick the **Sending e-mail** box if you want to send your reminders per e-mail. Then, select the e-mail account to use.

Tick the **Printing** box if you want to print reminders.

Tick the **Inscription** box in order the software to save the date and the number of reminders sent for each overdue loan. Usually, untick this box only for test purpose.

Tick the **Include all loans** box if you want the reminder to mention also other loans that are not overdue, so that the reader has the complete picture of his/her current loans.



1.4.2 Letters tab

Define on this page the text of reminders. You can define three chunks of text : the **text on head of page** (that is printed above the list of overdue loans), the **text between recalled titles and other titles** (it is printed only if the box **Include all loans** has been ticked on the **Actions** tab) and the **text at foot of page**.

The text can be setup in several languages and the software will use the reader's mother tongue.

You can also insert fields coming from the addresses file in order to customize reminders with readers' data.

The screenshot shows the 'Letters' tab in a software interface. At the top, there are three tabs: 'Actions', 'Letters' (selected), and 'E-mails'. Below the tabs, there are two dropdown menus: 'Language' set to 'English' and 'Addresses'. To the right of the 'Addresses' dropdown is a list of fields: 'Address', 'Allow displaying past loans', 'Balance', 'Canton', and 'Category'. The main area is divided into three sections, each with a title and a text input field:

- Text on head of page**: The input field contains the text: "The date of return for the following titles is over. Please return them to the library as soon as possible."
- Text between recalled titles and other titles**: The input field contains the text: "Please note that you have lent other titles :"
- Text at foot of page**: The input field contains the text: "With best regards" and "Your library team" on two separate lines.

1.4.3 E-mails tab

Define here the title of reminders per e-mail and the layout of e-mails.

E-mails are sent in two formats : **HTML** (with a rich layout and text styles) and **Plain text** (no text style). With this combination, recipients should be able to read the e-mails, whatever the mail program used.

As you can see, changing the HTML code needs technical knowledge. Please contact us if you need help.

1.4.4 Setting up search and sort criterion

By default, when generating reminders, the software searches overdue loans corresponding to several criteria (delay before the first reminder or between reminders, etc.) *in the current loans records selection*.

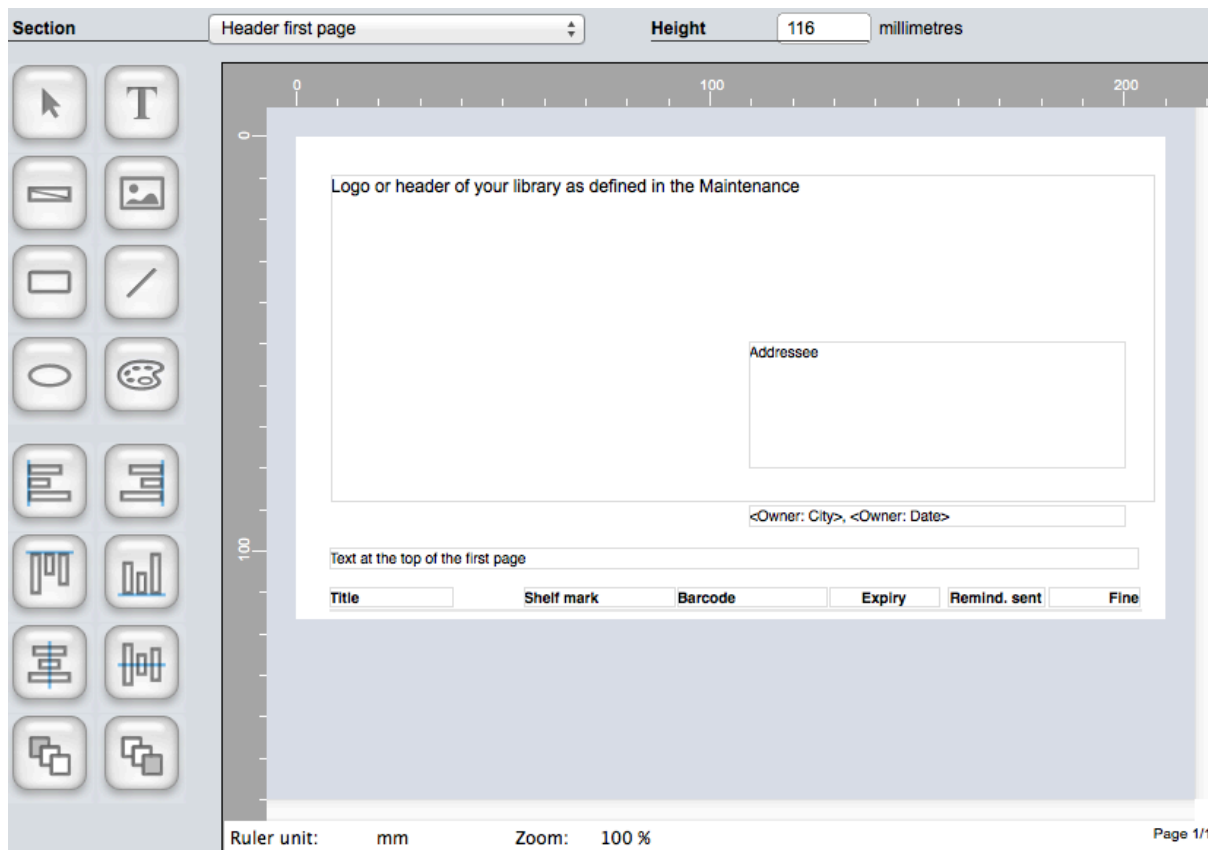
You can nevertheless add other search and sort criteria : click on the **Options** button for the **Reminders** print layout, then on the icon with the cog-wheel icon.

Please note that if you define search criteria, the search result will overwrite the current records selection. This is why you could get reminders for loans that are not in the initial records selection.

1.5 Customizing printed reminders

With help of the layouts editor available in BiblioMaker Standard and PRO, you can customize the layout of the reminders.

Standard print layout cannot be modified. This is why you must first create a copy of the layout to customize with the **Duplicate** button of the Print dialog, then click on the **Modify** button in order to create a copy of the layout.



1.5.1 Reminders headers

As other print layouts generated by BiblioMaker, reminders use a heading containing usually the library address or logo.

You define this heading in the software Maintenance : call the **File>Maintenance** command, then, the **Maintenance>Configuration** command. In the **General** tab, enter the library name and address in the **HEADING** field. If your library has a logo, you can insert it into the **LOGO OF YOUR LIBRARY** field (**Logo** tab).

Caution : if you inserted a logo, this one will be used by the software instead of the heading defined as a text. This means that if you want to use the logo AND the library address, you have to create a picture containing both elements. Then, insert this picture to the **LOGO OF YOUR LIBRARY** field.

Second remark : the logo is used only for printed reminders, not for reminders by e-mail. E-mails contain only the text of the **HEADING** field.

2. Sending reminders

After all settings have been defined, sending reminders is a breeze.

2.1 Choosing overdue loans

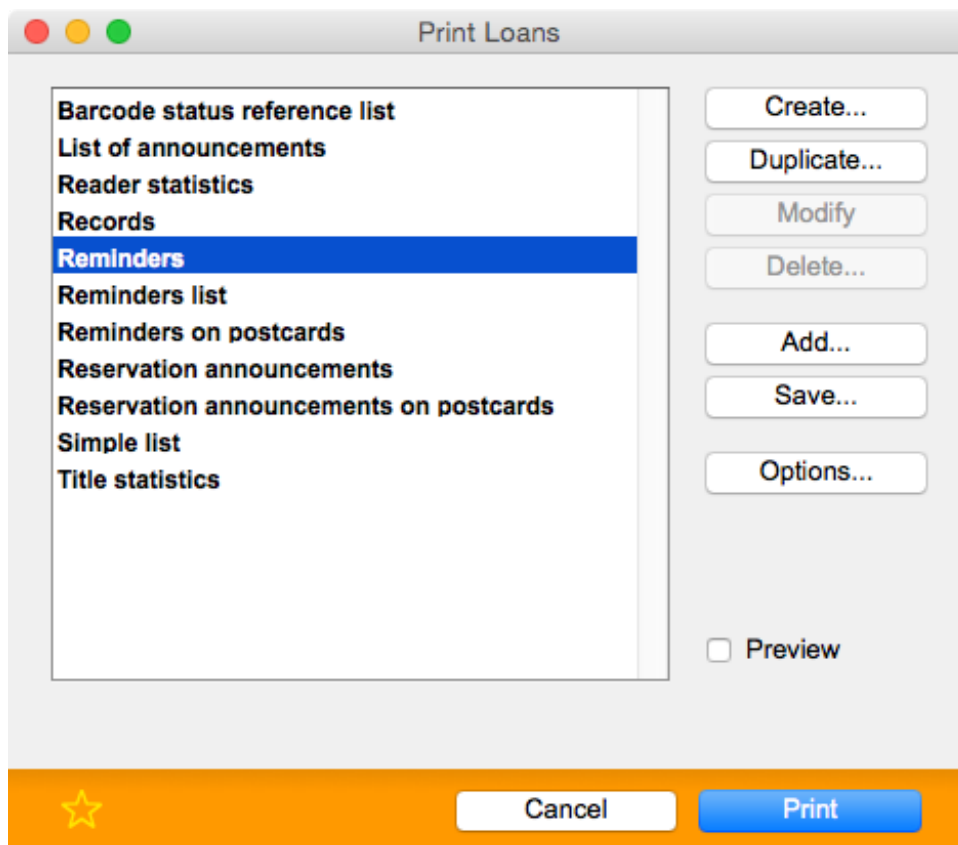
The first choice concerns the selection of overdue loans. Indeed, the software generates reminders only for the selected loan records.

You can choose to send reminders for all overdue loans. In this case, when viewing the Loans file, call the **Action>All records** command in order to display all loan records (overdue or not).

But you could also choose to send reminders for some overdue loans only (for instance in a school, only to pupils and not to teachers). In this case, you must create a manual selection of overdue loans with a search function or with a manual selection of loans.

2.2 Generating reminders

After you have created your selection of loans records, call the **File>Print** command and select the **Reminders** layout. Click on the **Print** button and validate the next dialog boxes.



If you have chosen to generate reminders by mail and e-mail, the software checks the preferences of each reader with overdue loans and generates the reminder accordingly: this is why it is not necessary to generate reminders per mail and e-mail in two separate sessions.

2.3 Logging generated reminders

If in the Reminders Options the **Inscription** check box is ticked, a dialog box is displayed after the reminders have been generated. This dialog box requires a confirmation that all is OK : if you had for instance a paper jam in the printer, it would be better not to confirm : generated reminders are not memorized and you can immediately generate the same reminders again.

2.4 Canceling generated reminders

If reminders have been confirmed and a problem should nevertheless arise, preventing from sending the reminders (for instance, because the e-mail address of some readers is not valid), you can cancel the inscription of generated reminders in order to send the same reminders again.

The first step is to search for the loans records for which you want to cancel the inscription. You can call the **Action>Search** function and use the date of the reminder as a search criterion.

After you have created a selection of loans records, call the **Action>Apply>Last reminder** command. This will delete the date of the last reminder and decrement the number of reminders sent. Please note nevertheless that you cannot cancel the inscription for loans with more than 3 reminders.

