Reminders for nearly due loans

The BiblioMaker software contains a function for automatically sending by e-mail a reminder to readers some days before the date of return for their loans.

This document explains how to setup this function.

Contents

1. Function presentation

This function reminds readers with nearly due loans that the date of return is not far away.

This function is similar to the traditional reminders sent **after** the date of return, but there are some differences :

- As the reminders are more effective when sent at the right time, sending e-mails is automatic. At the opposite, sending reminders after the theoretical date of return is done by the librarians, as they usually want to control whom the reminders are sent to.

- Early reminders are sent by e-mail only in order to save postal expenses.

- Only one reminder per lent title is sent to a given reader. This is why there is no inscription of sent reminders.
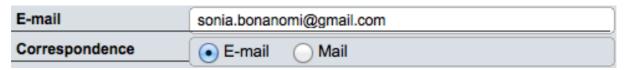
With the software's server version, you setup the reminders from a workstation, but e-mails are sent from the server.

2. Setting up reminders

2.1 Entering addresses

If you want to be able to send reminders by e-mail to readers, you have of course to enter their e-mail address.

After you have entered the e-mail address, you have to choose with the CORRESPONDENCE radio button the *E-Mail* value. A reader with an entered e-mail address but with a Mail value in CORRESPONDANCE will not receive early reminders.
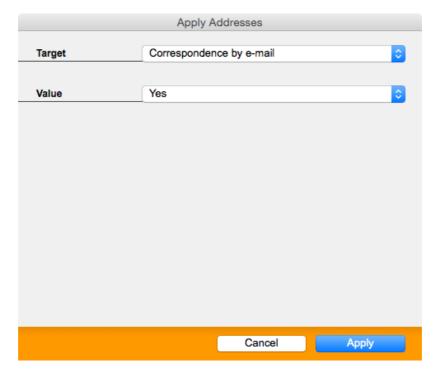

2.1.1 Retrospective modification of correspondence settings

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 :

<p style="text-align:center">E-mail   is different from [leave empty]</p>

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

2.2 Settings for automated early reminders

Early reminders are effective only if they are sent at the right time : too early, they will be forgotten and too late, they are useless. It's up to you to decide when early reminders must be sent (usually some days before the theoretical date of return).

As the «right time» is short (1 to 2 days), early reminders must be sent regularly, usually every day. This is why sending e-mails must be automated with the job scheduler.

But before we deal with creating a task for sending reminders, it is necessary to give some explanation about setting up sending e-mails with BiblioMaker.

2.3 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	*Loans service*
E-mail Address	E-mail address of the sender	*loans@library.com*
Complete name	Name of the sender	*Kensington Library*
Account name	Your account name	*loans*
Authentication with password	Please tick if the mail server requires a password	
Password	Password to connect to your mail server	*12345*
SMTP server	Mail server address	*mail.library.com*
SMTP port number	TCP port number (usually 25 for uncrypted communication, 465 or 587 for crypted communication)	*587*
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	Administrator
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	2.5
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

Field name	Explanation	Example
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.).

2.4 Configuring early reminders in the Job scheduler

As sending early reminders is fully automated, you set them up in the Job scheduler, which is available from the Maintenance (menu **File**>**Maintenance**) with the **Maintenance**>**Job scheduler** command.

Create a new task with the **Add** button. Give the task a name and select in the **Action** pop-up menu the **E-mail to readers for nearly due loans** value. Then click on the **Options** button in order to set up several criteria.

2.4.1 Options

2.4.1.1 Actions tab

Define on this page the e-mail account to use, when the reminder should be sent (either some days before the date of return or some days after the date of loan), restrict sending e-mails to loans with a minimum duration (if for instance you loan DVDs only for 3 days, an early reminder would not be very relevant) and if necessary restrict sending e-mails only to some titles or addresses types. Finally, choose if you will mention the loans that are nearly overdue only or all loans, so that the readers have a complete overview of their loans.

2.4.1.2 Text tab

Define on this page the text of early reminders. You can define three chunks of text : the **text on head of page** (that is printed above the list of loans), the **text between the nearly due loans and other loans** (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.

2.4.1.3 E-mails tab

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

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

2.4.2 Sending frequency

Define then how frequently early reminders must be sent. We suggest that you send them daily. A reader will anyway receive only one early reminder per loan.

You can also set up the task's execution time. It is recommended to send e-mails every day, even when the library is closed, in order to be as close as possible to the «right time».

It could happen that early reminders cannot be sent at the right time, because of technical hurdles or simply because the computer is not running. In this case, at the next software startup, all pending tasks are executed immediately. Nevertheless, early reminders are not sent for overdue loans. This is why some readers could receive no early reminder.

The NEXT EXECUTION field lets you define when the task must be executed first. You can choose between **Immediately** or **Later…**

3.   Sending early reminders

Once all settings have been defined, sending of early reminders is automatic.

3.1   Controlling of sent reminders

You can control that the automatic sending of early reminders is OK :

In the Job scheduler, select the task for sending early reminders and click on **Modify**. Then click on the **Log** tab.

The log displays all events that happened, task startup, possible problems, etc.

At the bottom of the dialog box, a pop-up menu with a cogwheel icon lets you save the log in a text file or delete the log.