

Notices

Note

This page provides an overview of notices in Alma such as the available options for overdue notices, the types of print slips and receipt notices that are available, support for sending ad-hoc messages to patrons or patron groups, etc.. For information on working with letters in Alma including configuration, enabling/disabling letters, a list of all the letter types, etc., see [Configuring Alma Letters](#).

Configuration, customization

What configuration options are there related to overdue notices?

The configuration table 'Overdue and Lost Loan Profile' defines rules related to sending overdue notices to patrons, as well as defining when an item will be declared lost. Any number of rules may be defined. The table allows for configuring rules related to loan status, user group, library and location, item policy, material type.

If the Notification only checkbox is checked, then an overdue notice will be sent out

If the Active box is checked, then the item that matches the parameters in the rule will be declared lost, and a lost loan notice will be sent to the patron.

The screenshot shows the 'Overdue and Lost Loan Profile Record' configuration page. The 'Name' field is 'Overdue notices to users' and the 'Description' is also 'Overdue notices to users'. The 'Active' checkbox is checked. The 'Profile Type' is set to 'Overdue notification type 1'. The 'Send Notification' checkbox is checked. The 'Create Overdue Loan Fine' and 'Create Block' checkboxes are unchecked. The 'Days After Due Date' is set to 5, and the 'Days After Status Date' is set to 0. The 'Loan Status' is set to 'Normal'. The 'User Group' dropdown is open, showing options: Alumni, Distance Learners, Graduate Student, Guest, High School Students, and Undergraduate Student. The 'Days' radio button is selected, and the 'Open Days' radio button is unselected.

Can notices be customized?

Notices and forms can be customized at the institution level and inherited by all libraries.

Patron Notices are generated using an XML/XSL mechanism that allows the library to fully configure the notices. The customizations may include changes to the style, the addition or subtraction of information sent to users, and so forth. The Configuration Files page lists all of the XML style sheets that are used to format each type of letter and determine what XML data fields display in the letter emails and SMS messages. The delivery schedule of notices can also be configured:

General Configuration

[Letter emails](#)

[Letter Activity](#)

[Letter Retention](#)

[Notification Template](#)

[XML To Letter Admin](#)

[Customize Letters](#)

[Other Settings](#)

[Institution Languages](#)

[Home page Notifications](#)

[CRM Contacts](#)

[Staff Login Report](#)

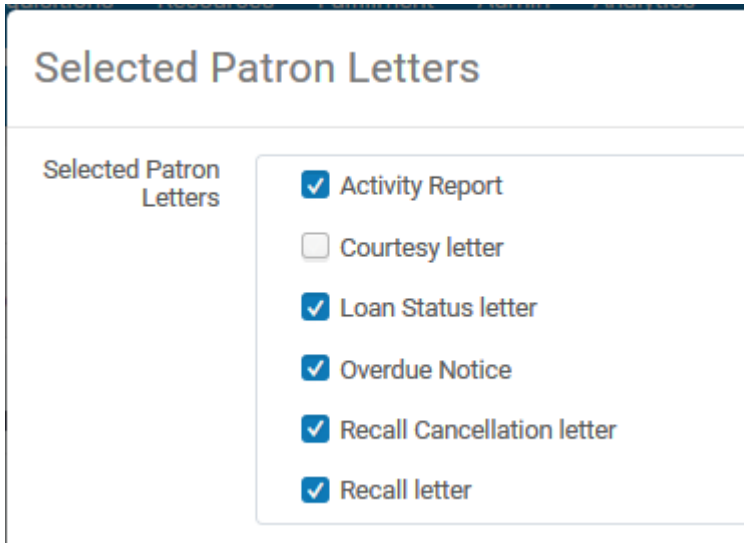
Can patrons 'opt out' of receiving notices?

Alma supports the option of allowing patrons to 'opt-out' of receiving certain library notifications. This can be defined at the individual patron level, or groups of patrons by SIS feeds or bulk user updates.

A configuration table defines the notices that it will be possible to opt-out of. For example, in the table below, patrons will not be able to opt-out of receiving overdue notices.

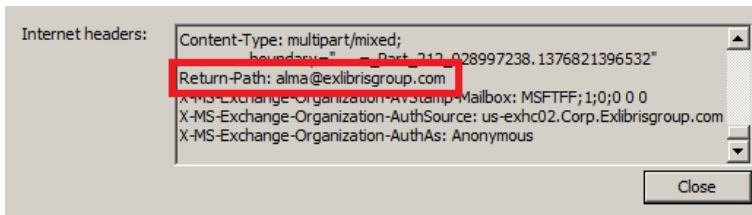
Library Notices Opt In							
Table Description	List of library notices to opt in		Managed in Network	No			
Customization mode:	Entire table needs to be customized						
Enabled	Letter Code	Letter Description		Opt in by default	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	FullUserBorrowingActivityLetter	Activity Report	-	True	dawnb	02/14/2017
2	<input checked="" type="checkbox"/>	FullUserLoansCourtesyLetter	Courtesy letter	-	False	dawnb	02/14/2017
3	<input checked="" type="checkbox"/>	FullUserOverdueNoticeLetter	Overdue Notice	-	True	dawnb	02/14/2017
4	<input checked="" type="checkbox"/>	FullItemChangeDueDateLetter_ST2	Loan Status letter	-	True	dawnb	02/14/2017
5	<input checked="" type="checkbox"/>	FullItemChangeDueDateLetter_REC	Recall letter	-	True	dawnb	02/14/2017
6	<input checked="" type="checkbox"/>	FullItemChangeDueDateLetter_REC	Recall Cancellation letter	-	True	dawnb	02/14/2017

An example of an opt-out on the patron record:



Is it possible to configure the email address to send notices that bounce?

The EnvelopeFrom parameter determines the “Return-Path” which is used when an email is sent from Alma. An example of an email sent from Alma:



Can copies of notices to patrons be sent to a library email address?

It is possible to send system emails with blind carbon copies (BCC) for any preconfigured email address:

< Code Table Cancel Custom

Fines And Fees Report Letter

Table code	FinesAndFeesReportLetter	Table Description	Fines And Fees Report Letter
Patron Facing	Yes		
Customization mode:	Specific rows can be customized		

Customize All Restore Default Translations

Filter: English

Enabled	Code	Description	Translation	Updated By	Last Updated	
1	subject	Fines And Fees Report	Fines And Fees Report	-	-	...
2	letterName	Fines And Fees Report Letter	Fines And Fees Report Letter	-	-	...
3	Bcc	None	None	-	-	...
4	Cc	None	None	-	-	...
5	message	The fines and fees report is attached	The fines and fees report is attached.	-	-	...

Can the library define how long notices to users are retained?

By default, letters sent by Alma are retained indefinitely. However, the mapping table **Letter Retention Configuration** was added to the General Configuration menu to define the retention length per letter. The table lists letters and the number of days the letter is retained before auto-deletion.

In addition a general weekly batch job, **Letters Purge with Retention**, deletes all enabled letters, if they were created more than the configured number of days ago.

Notice types

What types of notices are supported in Alma?

Alma supports notices to users, external contacts and staff. These can be printed or emailed. Alma also supports standard SMS communications (e.g. for item on hold shelf, courtesy notices, overdue notices, etc.). SMS messages are sent to patrons only if they have indicated preferred SMS numbers.

In general, the transmission of SMS notifications is based on an external SMS service provider, which handles the actual SMS message delivery. Alma's role is to identify the need to text the patron and produce a message with the required information in the format defined by the institution. Alma places the required information at a configured FTP location for the service provider to collect and subsequently deliver to the patron.

There are currently more than 50 types of letters that can be customized locally, including receipts, pick slips/paging slips, hold availability notices, overdue notices, and borrowing activity notices. A sample listing follows:

Name	Description
Borrowed By Letter	Sent to patrons indicating that a proxy user has borrowed an item on their behalf.
Borrowing Activity Letter	Sent to patrons; contains a list of all the patron's loans, overdue items, and active fines. Sent either by a job or by request.
Conversation Letter	Used to conduct communication with vendors.
Courtesy Letter	Sent to patrons in a nightly job; contains a list of the patron's loans that are due. Generated when the Notifications - Send Courtesy Notices and Handle Loan Renewals job runs and one of the following occurs: <ul style="list-style-type: none"> • Conditions of an automatic loan renewal rule are not met • A block exists on the patron or item, preventing item renewal)
Fine and Fees Report Letter	Sent to patrons; contains a report of the fine and fee transactions that have been performed over a 1- to 7-day period
Fine Fee Payment Receipt Letter	Sent to patrons; indicates that payment has been received.
footer.xsl Letter	Defines the text (such as <i>Contact Us</i> and <i>My Account</i>) used in the footer for all letter emails.
Borrowing Info Letter	Sent to patrons; indicates whether a loaned resource sharing item was successfully renewed.
Cancel Request Letter	Sent to patrons; indicates that a request has been canceled and the reason for the cancellation.
Citation Slip Letter	A slip that is printed out by library staff of a course reading list citation, so that the item can be retrieved from the shelf.

Name	Description
Citations Slip Letter	A slip that is printed out by library staff of all course reading list citations so that the item can be retrieved from the shelf.
Digitization Notification Item Letter	Sent to a patron who asked for material to be digitized. The letter informs the patron that the digitization request has been completed and informs the patron where the digital material can be viewed.
Incoming Slip Letter	A slip that is printed out by library staff from the Resource Sharing Lending Requests Task List when they need to retrieve an item from the shelf to be shipped to a borrower.
Lost Loan Letter	Sent to patrons when a loan has been declared lost. Sent either by a job or when manually changing the loan.

Notices in Alma are based on XML files generated by the system, and run through XSL files that customize and set the styling on the Alma-generated XML data. The XSL files are fully customizable by the library, so that styling of the printouts is fully controlled by the library.

Notices and forms can be customized at the institution level and inherited by all libraries, or customized at the library level. The delivery schedule of notices can also be configured.

The Configuration Files page lists all of the XML style sheets that are used to format each type of letter and determine what XML data fields display in the letter emails and SMS messages. Alma allows you to configure these style sheets to customize letters for your institution. The customizations may include changes to the style, the addition or subtraction of information sent to users, and so forth.

The following is an example of an automated borrowing activity letter sent to a patron, followed by an example of notification of a requested item waiting to be picked up from the hold shelf:

ExLibris

Borrowing Activity Letter

Kim Best

Dear Mr./Ms. Best

We would like to remind you that you have the following items at your disposal:

Overdue Loans

Title	Description	Author	Due Date	Fine	Library
Scope and methods of the Central Planning Bureau.	Netherlands. Centraal Planbureau.	01/06/2014		Main Library	
The probation service in England and Wales.	Great Britain. Home Office	01/06/2014		Main Library	

We would like to remind you that you have a debt:

ExLibris

On Hold Shelf Letter

Sara Carr
123 Main St.
Centerville

Dear Mr./Ms. Carr

The following item, which you requested on 01/22/2014, can be picked up at Main Library - Main Circulation Desk Circulation Desk.

The item will be held for you until 01/29/2014.

Devil take the hindmost : a history of financial speculation /
By: Chancellor, Edward,

What print slips and receipt notices are available?

Print Slips

Ful Citation Slip Letter

A slip that is printed out by library staff of a reading list citation so that the item can be retrieved from the shelf.

Ful Citations Slip Letter

A slip that is printed out by library staff of all course reading list citations so that the items can be retrieved from the shelf.

Resource Sharing Lending Slip

A slip that is printed out by library staff from the Resource Sharing Lending Requests Task List when they need to retrieve an item from the shelf to be shipped to a borrower.

Ful Pickup Print Slip Report Letter

Sent to users; contains a detailed list of resources that need to be picked up.

Ful Resource Request Slip Letter

A slip that is printed out by library staff from the Pick Up Requested Resources page when they need to retrieve an item from the shelf.

Ful Transit Slip Letter

A slip that is printed out by library staff that is added to an item when it is sent from one place to another.

Lending Requests Report Slip Letter

A slip that is printed out by library staff for the selected requests in the lending task list that lists the availability of the items so that they can be taken off the shelf and shipped to the requester.

Receiving Slip Letter

A slip that is printed out by library staff with item information that is put in a new item when it arrives at the library. (See also Receiving Slip Letter in [Letter List](#).)

Resource Sharing Receive Slip Letter

A slip that prints automatically when the Automatic Print Slip option is selected on Receiving Items.

Resource Sharing Return Slip Letter

Printable when returning a borrowing item to the lender. Printing the letter will take place if:

- Scanning in an item triggers a return (including Managing Patron Services and Return Items menu option)
- Using the Return option in the task list (see Workflow Actions).
- The letter is not relevant for NCIP transactions.

Resource Sharing Shipping Slip Letter

Sent to a user when the user clicks the Ship Item link for a lending request and then selects Automatically Print Slip = Yes on the Shipping Items page.

Receipt Notices

Loan Receipt Letter

Sent to patrons after items are loaned from the circulation desk.

Return Receipt Letter

Sent to patrons after items are returned to the circulation desk.

Fine Fee Payment Receipt Letter

Sent to patrons; indicates that payment has been received.

What options are available in relation to overdue notices?

You can add overdue and lost loan warning profiles to an institution or library. These profiles determine the criteria by which the system sends overdue warnings for loans. The warnings do not affect the loan status; they inform the patron of the number of days upon which the loan is considered lost. A single overdue or lost item notification per notification type may

be sent to the patron listing all of the patron's overdue or lost loans.

You can configure 5 types of notifications and their corresponding letters. After configuring the notification types, you then configure the profiles that will trigger these notification types. For example, a first notification may be sent after one week, followed by a second, third, fourth and fifth notification every 3 days. The profiles can be configured for each library, and may additionally also create blocks or additional fines.

Below is an example of a rule that sends a first notification for overdue ipads for the main library. This notice is sent to undergraduate students only, and is sent 5 days after the due time. Different rules may be set for additional notices, depending on the owner, the type of material, its location, and the borrower.

Overdue and Lost Loan Profile Record

Name * Notification profile for ipads

Description

Active

Profile Type * Overdue notification type 1

Send Notification

Create Overdue Loan Fine

Create Block

Days After Due Date 5

Days After Status Date 1

Loan Status Normal

Library Main Library

Item policy 1 Day Loan

Letter send format * Both

Days Days Open Days

User Group Undergraduate Student

Locations

Material Type iPad

Printer Alma University - HP5100

Does Alma support courtesy notices?

Alma automatically sends patrons courtesy notices and due date reminders via email, in addition to lost loan notices, notifications of items waiting on the hold shelf, recall notices, etc.

An example of a courtesy letter;

Courtesy Notice

Sara Carr
123 Main St.
1800234567
College Town

Dear Mr./Ms. Carr

The item Autumn hearts. is due back at 08/11/2014 12:09 after which there will be a fine of 1.0 USD per hour.

Can notices be sent for short loan items?

Alma can send notifications and block patrons for short term loans. Short term loans are any loan defined in minutes or hours. Once a short loan is created, Alma checks the associated customer parameters (Fulfillment configuration > General > Other settings):

- If the **short_loan_courtesy_reminder** parameter is set, a courtesy reminder is triggered based on the due date time less the value of that parameter.
- If the **short_loan_overdue_reminder** parameter is set, an overdue reminder is triggered based on the due date time plus the value of that parameter.

For both notifications, the letter will be sent if the item was not returned, is not in **Lost** or **Claim Return** status,

Notification

Can patrons receive notification of fines and fees owing?

See under: [Alma FAQs/Fulfillment/Fines and Fees](#)

Does Alma support automated and customized sending options for notices?

Patron notices can be printed or emailed. Most notifications are generated automatically as part of a workflow, for example when items are placed on a hold shelf or when an item is considered lost. Some notices are sent as a batch job overnight (fines/fees, courtesy notices, due date reminders) and others are sent real time (borrowing activity, fine payment receipt, recall/hold notifications).

Email messages can be sent to patrons from the patron record by activating the email icon on the General Summary tab. Alma also supports standard SMS communications (e.g. for item on hold shelf, courtesy notices, overdue notices, etc.). SMS messages are sent to patrons only if they have indicated preferred SMS numbers.

In general, the transmission of SMS notifications is based on an external SMS service provider, which handles the actual SMS message delivery. Alma's role is to identify the need to text the patron and produce a message with the required information in the format defined by the institution. Alma places the required information at a configured FTP location for the service provider to collect and subsequently deliver to the patron.

Staff members can also send messages to patrons that require them to logon to their account in Primo in order to view. The screenshots below demonstrate this functionality from the staff side in Alma and the user side in Primo:

Sara Carr

Primary identifier Sara Carr
Record type Public

Account Type Internal
User group Undergraduate Stu...

General Information Contact Information Identifiers **Notes** Blocks Fines/Fees Statistics Attachments Proxy For

1 - 3 of 3

Note Type: All

Note	Type	User viewable	Created By
1 forgotten umbrella in library	Other	✓	melanief [A]
2 Don't forgive any more fines	Circulation		circ [A]
3 See registrar--You need to update your address	Address	✓	Chris Parson

My Library Card Alma University

OVERVIEW LOANS REQUESTS FINE + FEES **BLOCKS + MESSAGES**

Blocks + messages

Alma University-

See registrar--You need to update your address

forgotten umbrella in library

Can notices to patrons be sent by SMS?

See also [General - Integrations - SMS](#)

As part of a library's processes, Alma produces various notifications for the library's users. The notifications may be sent to a user by email, or printed. Alternatively, some of the notifications may be sent as SMS messages to the user's mobile phone.

Alma supports SMS messages for most of the fulfilment generated patron notices, including:

- Hold Shelf Notifications
- Overdue notifications
- Patron Borrowing Activity Reports
- Courtesy Notices
- Lost Loan Notification
- Loan Recall Notice
- Cancelled Request Notifications

Alma's support for SMS messaging is by creating files with the short messages and the required phone numbers. These files are in turn harvested by the messaging application which in turn sends the text messages to the exported phone numbers.

Phone Number

Phone types *	<input checked="" type="checkbox"/> Home <input type="checkbox"/> Mobile <input type="checkbox"/> Office <input type="checkbox"/> Office fax
Phone number *	1800234569
Preferred phone number *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Preferred SMS *	<input checked="" type="radio"/> Yes <input type="radio"/> No

Does Alma support printed notices?

Most notifications are sent as email, or as an SMS if the patron opts it to this service (by supplying a number to send the messages to), and cannot be sent as printouts as well. Some notifications may be configured to be printed out, usually if the patron is at the library desk. Examples would be loan/return receipts. Overdue loans and overdue notices notifications may also be configured to be sent by print.

Can ad hoc messages be sent to all patrons or specific patron groups?

The library may create a list of users' identifiers, and use that as an input to a job that will send a customizable notification to all of the users in the list. The text and format of the notification is fully library configurable.

Scheduling

How is the scheduling of notice generation supported?

- Courtesy notifications
 - The renew job sends courtesy notices to all non-renewable loans (which may be configured to be all loans) x number of days before the loans are due, where x is configurable at the institution level.
 - Another notification is sent on the day the item is due
- Overdue notices are configurable via the lost/notification profiles
 - A notification profile may be set up to send warning if loans are overdue more than x number of days, where x is configurable per library/location, user group, item type and material type.
 - A lost item profile may be set up to mark a loan as lost and send a lost item bill if loans are overdue more than x number of days, where x is configurable per library/location, user group, item type and material type.
- Activity report – A general report, including all on loan and all overdue loans may be sent regularly, on a weekly or monthly basis. The report includes separate lists of on loan items and of overdue items. It also includes the patron's fine/fee balance

Total views:

19265