Account discrepancy alerts

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Create alerts to inform when account discrepancies are found by OLIB.

Overview

Should the OLIB funds system develop any inconsistencies there are features to help overcome this:

- The Daystart program automatically corrects any discrepancies in Committed and Spent amounts.
- It is possible to configure the OLIB Alerts system to send an email to someone if a discrepancy is found and corrected by the Daystart program. This will make it easier for OCLC Support to trace the cause.

Alerting

Alerting works by sending an email from OLIB to the designated user or list of users.

Example:

Dear OCLC Support,

I'm afraid to report that there seems to be a discrepancy in the Committed and/or Spent amounts for the following account instances on our system:

[Account Instance details + discrepancy details]

I am aware that the daystart process will have automatically corrected the account instance. However, this email is to alert the Support Desk to the situation should investigation be required.

Thank you,

Insert Name Here

Insert Position Here

Insert Library Name Here

Configure and enable the Account Instance Discrepancy notice

1. Select the Alert Regarding Acc. Inst. Discrepancy and in Other Actions choose Create Close Copy.
2. Click on the **copy** to display full details and Modify Record.

3. Leave Notice Type set to Alert Regarding Acc. Inst. Discrepancy.

4. Leave the other fields in this section blank.

5. An example Account Instance Discrepancy Alert notice is included as standard. By default the Notice Text this is set as follows

   <body><basefont size="3" color="blue" face="Arial"/>Dear OCLC PICA Support,<br /><br />I'm afraid to report that there seems to be a discrepancy in the Committed and/or Spent amounts for the following account instances on our system:<br /><br /><REPTEXT><br /><br />I am aware that the daystart process will have automatically corrected the account instance. However, this email is to alert the Support Desk to the situation should investigation be required.<br /><br />Thank you,<br />Insert Name Here<br />Insert Position Here<br />Insert Library Name Here</body>

6. Modify the **text** as required. In particular, change the final 3 lines so that the email includes your name and your organisation's name. The <REPTEXT> OLSTF tag can be positioned anywhere in the email to cause the system to include the table of account instances that were corrected.

7. Set From Address to **your email address**, so that OCLC Support can reply to you directly.

8. Set Transmit Type to **To To List**.

9. In To List enter an email address to send the account instance discrepancy alert email to, e.g. the OCLC (UK) Support email address, or your own email address if you want the system to send the email to you rather than to OCLC (UK) Support. In CC List enter an email address to which a copy of the account instance discrepancy alert notice should be sent. In BCC List enter an email address to which a blind copy of the account instance discrepancy alert notice should be sent.
   
   Note: In all three email fields, multiple email addresses can be entered. Multiple addresses should be separated with a semi-colon.

10. In Subject Line modify the **text** to be used as the subject line of the account instance discrepancy alert notice as required, e.g. to change MyOrganisation's to your organisation name.

11. Set Enabled to **Yes** to cause the system to send the account instance discrepancy alert notice in daystart. If it is set to No or is empty, the account instance discrepancy alert notice will not be sent in daystart.

The [SMTP server name](https://help.oclc.org/Library_Management/OLIB/Funds/35Account_discrepancy_alerts) for your organisation must also be configured for alerting to work.