Discover how to set up notifications about circulation transaction events in OLIB.

About transaction alerts

OLIB has a number of Alerting notices that can send an alert email when specific circulation transactions occur. For example you may want to configure a notice that sends an email to a User when they make a renewal through the OPAC - as a type of confirmation. In practice you can configure a notice for any other circulation transactions too, these include:

Transactions: Issue - Collect - Issue on permanent loan - Collect on permanent loan - Renewal - Unseen Renewal - Automatic Renewal - Return - Claims Lost Return - Non-loan Return (sent to a To List not a 'borrower') - Issued In Transit (should be sent to a To List not a 'borrower') - Returned In Transit (should be sent to a To List not a 'borrower')

In Alerting> Notices, you can select these circulation transaction types from the Circulation Transaction drop down in the circulation Notice Details.

Other circulation transaction types either already have alert types (Res. Held Notification, etc.) or are not suitable for alerting. The Notices domain includes an Example Notice for each circulation transaction type. You can make a copy of these, specific to your organisation and configure them e.g. by adding From Address and Enabled=Yes. The circulation transaction that triggers the alert email is displayed at the foot of the notice.

You can configure more than one alert for a transaction type. They can be different based on the Locations, User Categories and Copy Categories that apply.

Caution: it is normally preferable to configure your own copy of an alert so that it cannot be overwritten by a subsequent OLIB upgrade.

Configure alert

1. Go to Alerting> Notices.
2. Search and select the notice required, e.g. Example Circ. Renewal Notice. Make a copy of this record.
3. In Locations enter the location codes where this notice applies, surrounded by semi-colon ';'. This is the location of the User. For example, ;MAIN;BRIN;.
4. In User Categories and Copy Categories enter the codes for which this notice applies, e.g. ;STD;STU;LIB; surrounded by semi-colons ';'.
5. You can use any User, Copy or Title tag in the notice text field. The following fields in the Copytrans (Copy Transactions) table can also be used:
Here is the text from the Example Renewal record:

The following renewal transaction has been recorded:
Transaction ID: <CT_ID>
Borrower: <CT_TRANS_USER>
Title: <TI>
Copy: <CP_BC>
Renewed on: <CT_TRANDATE>
Due back on: <CP_RETDATE>

6. Set Transmit Type: To user's email address sends the email to the email address in the user's record, e.g. for renewal confirmation, or if this is empty, to the email address in the To List field. If this is a transaction where you do not want to email the user directly set the Transmit Type - To To List.

7. Set From Address to a valid email address, e.g. a generic address for your library, so that if the user clicks the Reply button, the reply email will be delivered to the appropriate member of staff who deals with user responses.

8. Configure the recipients of the email:

To List: used to specify who the notice should be sent to if it is not to be sent to the user.
CC List: enter an email address to which a copy of the notice should be sent.
BCC List: enter an email address to which a blind copy of the notice should be sent.

Tip: in all three of the above fields, multiple email addresses can be entered. Multiple addresses should be separated with a semi-colon.

9. In Subject Line enter the text to be used as the subject line of the notice.

10. Set Enabled to Yes.

11. The Circulation Transaction is available from a drop down - this is the transaction that will trigger the alert notice.

When a circulation transaction alert is sent to a user, the details of this can be viewed in Users: Email Notice History as described in View User Details.