Configure Notify Patron messages

Learn how to configure Notify Patron messages. It is possible to create a set of saved Notify Patron messages. Staff can select from these, then add to or modify the text prior to sending a Notify Patron message. There are two elements to the configuration of the Notify Patron messages, Messages and Header, footer, subject, and report for messages.

Messages

Add a Notify Patron message

1. Login to Table Maintenance.
2. Click on the Miscellaneous tab.
3. Click on Patron Messages.
4. If desired, click Clear, to erase the existing data from the form.
5. Enter the information for the Notify Patron message.
6. Click Add.
7. Select the Hold in Queue. Typically, the message chosen is Awaiting Response.
8. Select the Responded Queue. Typically, the message chosen is Patron Responded.
9. Enter the description (maximum 50 characters). This is the text the staff see in the Message drop down box when selecting which message to use.
10. Enter an optional subject line. If no subject line is configured then the subject associated with the header and footer is used.
   Note: The subject is not used when sending a Notify Patron message for an ISO or generic script request.
11. Enter the text of the message. There is a maximum limit of 1,000 characters.

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<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library symbol</td>
<td></td>
<td>Enter your home library symbol. In a shared system, the library symbol is used to determine which Notify Patron messages to show to staff at each member library. When adding a new Notify Patron message, enter the library symbol for the library where this message is to be used.</td>
</tr>
<tr>
<td>Code</td>
<td>1</td>
<td>Enter a single character code</td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td>Enter a maximum of 50 characters. This is the text the staff see in the Message drop down box when selecting which message to use.</td>
</tr>
<tr>
<td>Hold in queue</td>
<td></td>
<td>If the Notify Patron message requires a response or document from the patron, then select the queue in which the request will sit while waiting for the response from the patron. Typically, <strong>Awaiting Response</strong> is used.</td>
</tr>
<tr>
<td>Responded queue</td>
<td></td>
<td>This is the queue in which the request will sit after the patron responds <strong>Yes</strong> to the message. Staff access these requests via Review Queue - Patron Responded.</td>
</tr>
<tr>
<td>Show messages from</td>
<td></td>
<td>Caution: In a shared system, select whether or not to show in this screen the Notify Patron messages of all member libraries or for a specific library. Default equals <strong>All libraries</strong>.</td>
</tr>
</tbody>
</table>
Update a Notify Patron message

1. Login to Table Maintenance.
2. Click on the Miscellaneous tab.
3. Click on Notify Patron.
4. In the grid, highlight the message that needs to be updated.
5. Modify the message as appropriate.
6. Click Update.

Delete a Notify Patron message

1. Login to Table Maintenance.
2. Click on the Miscellaneous tab.
3. Click on Notify Patron.
4. In the grid, highlight the message to be deleted.
5. Modify the message as appropriate.
6. Click Delete.

Header, footer, subject, and report for messages

Configure

1. Login to Table Maintenance.
2. Click on the Cover Pages tab.
3. In the grid, highlight the request type for which to modify the header, footer, subject or report used.
4. Click Notify/Cancel.
5. Update the Subject, Header, Report or Footer as required.
6. The request number token can be used in the subject line. The token is replaced with the request number at the time the Notify Patron is created.

7. Use basic HTML coding to ensure well formatted emails. To use HTML coding, add <HTML> in the Header and </HTML> at the end of the footer. To add carriage returns for spacing, use <BR>.

8. The default report used is NotifyText.rpt.
   - NotifyText.rpt includes the following, if available:
     - The text of the Notify Patron selected by staff along with any additional text entered
     - Date request submitted
     - Request Number
     - External Number
     - Need by date
     - Author
     - Title
     - Volume, issue and pages
     - Publication date
     - Author of article
     - Title of article
     - ISSN
     - ISBN
     - Max cost
     - Requester notes
     - Requester information
     - Additional notes from staff

9. If an alternate report is preferred, then browse the .rpt and click Open.