

8.5 CREATING OVERDUE NOTICE FORMS

The procedure of creating overdue notice forms is intended for creating, editing, activating and deleting overdue notices. The contents of the forms are specified and maintained by the library itself whereas the layout of the forms is specified and maintained by the library information service.



Note:

If the library does not interfere with the procedure of creating overdue notice forms, the default overdue notice forms are used when creating the report LOAN-ON-01: Overdue notices. The default forms contain the basic data and text in the domestic language, the default report format is in A4 format with the member's address on the left side (envelope with clear window on the left side). Default forms cannot be edited or deleted.



Note:

To create overdue notice forms, the privilege LOAN_OVR – Overdue notices is required.



Note:

*If the library already had edited customised texts for creating overdue notices (Postage paid (overdue notice), Introductory text (overdue notice), Conclusion text (overdue notice), Signature on overdue notices) in their user variable definitions, the customised content of the overdue notice forms must be edited with the **Overdue notices / Create overdue notice forms** method.*

Procedure

1. Highlight the **Overdue notices** class and select the **Class / Create overdue notice forms** method.

The **Creation of overdue notice forms** window will open where the data on the currently valid overdue notice forms is displayed. In the beginning, the default forms are active.

2. Select the procedure you wish to use to continue with the activities for maintaining overdue notice forms:
 - Create new forms
 - Edit forms
 - Activate forms
 - Delete forms
3. Once you click the **Select** button, continue with the selected procedure or abort the procedure by clicking the **Exit** button.

8.5.1 Creating new forms

Select the option of creating new overdue notice forms if you wish to create a new group of overdue notice forms. You can create a new group of overdue notice forms on the basis of default forms or with the help of previously prepared forms.

Procedure

1. In the **Creation of new overdue notice forms** window, select the **Create new forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
The **Create new forms** window will open.
3. In the *Form group* field, enter the name of the new group of forms and confirm by selecting the **OK** button.



Note:

*Groups of new forms are saved in the form of a file, so the following characters must not be used in the name of the form group: <, >, :, ", /, \, |, ?, *.*

The **Form groups** window will open.



Note:

When you create overdue notice forms for the first time, the Form groups window will not open as no new forms had been previously prepared. In this case the data from default forms is used in the new forms.

4. Select one of the previously prepared groups of overdue notice forms, which you can use to prepare new overdue notice forms.
5. Confirm the form group by clicking the **OK** button.

The **Editing data on overdue notice forms** window will open. In the title bar you will also see the name of the new group of forms you will be editing. All data from the group of forms you selected in the previous step will be displayed in the window.

The window is divided in three parts:

In the upper left part of the window is a table, where numeric values, which are used in the selected form group, are displayed. If a library has no departments, there is only one row in the table. If a library has departments, the number of rows in the table equals the number of departments with automated loan. The names of the six columns are displayed in the title bar of the table.

Individual table columns contain:

1. Column 1 – **Applies to**

In libraries with departments, names of departments with automated loan are displayed in individual rows, for which the data specified on the overdue notice forms will be taken into account. In libraries with no departments, there is only one row in this column, where *Home library* is displayed.

2. Column 2 – **Format and address position**

In this column, by clicking the selected table cell, a drop-down list will open, where you can select one value to specify the format and address position. You can select one of the following values:

- 0 – A4 format/address left
- 1 – A4 format /address right
- 2 – three-layer carbon-copy envelope

3. Column 3 – **1st overdue notice**

In the table cell, numeric values for data that is used on the first overdue notice form are displayed.

4. Column 4 – **2nd overdue notice**

In the table cell, numeric values for data that is used on the second overdue notice form are displayed.

5. Column 5 – **3rd overdue notice**

In the table cell, numeric values for data that is used on the third overdue notice form are displayed.

6. Column 6 – **4th overdue notice**

In the table cell, numeric values for data that is used on the fourth overdue notice form, are displayed.



Tip:

If you wish to see a description of numeric values in the table, you can use the screen tip by placing the mouse cursor on the selected cell. The screen tip will successively display the data types that are specified in the selected cell and will be taken into account on the overdue notice form.

In the upper right part of the window, you can select the data type that you wish to edit from the drop-down list. In one group of overdue notice forms, one or more data types can be edited. An individual data type can have different content versions, depending on the number of overdue notice or department where the overdue notice is prepared (in libraries with departments).

When you first edit the data, the default content of an individual data type will be displayed under the selected data type. An individual content version is marked with a number, based on which the selected content is displayed in columns from the first to the fourth overdue notice.

Positions of individual data types on the overdue notice form are displayed on the overdue notice template for A4 format (see figure 8.5-1). These data types can be edited.



Note:

For multi-layer envelopes, restrictions with regard to the quantity of entry of variable data must be taken into account when editing overdue notice forms due to the specified positions of data.

You can select one of the following seven data types:

1. Additional data under the library address

On the default overdue notice forms, only the general library address data is displayed, so this data type is blank in the beginning. On the overdue notice, additional data will be displayed under the general library address (e.g. e-mail address, telephone, fax, opening hours, etc.).

2. Postage (multi-layer carbon-copy envelope)

This data type contains the default value *Postage paid to post office ...*, which specifies the post office number and the name of the post office where overdue notices are sent to members. The default value can be edited or new content version can be added. This data type is edited only if the library uses multi-layer carbon-copy envelopes.

3. Overdue notice number (name)

For this data type, the variable value *%received overdue notice%* is already used, for which the appropriate number of the overdue notice received (1st OVERDUE NOTICE, 2nd OVERDUE NOTICE, 3rd OVERDUE NOTICE, 4th OVERDUE NOTICE) will be automatically displayed. If a library wants to specify a different form of numbering overdue notices or enter the overdue notice name in the text form (e.g. Director's notice, Overdue notice before the lawsuit, etc.), a new content version must be defined, which will be used in the group of overdue notice forms.

4. Introductory text

The data type *Introductory text* has a default general text, which can be edited or you can add new content versions.

5. Conclusion text

The data type *Conclusion text* has a default general text, which can be edited or you can add new content versions.

6. Signature on overdue notices

This data type contains the default general value *library head*. The data can be edited or you can add new content versions.

7. Price display at the end of the overdue notice

For this data type, two variable values, *%received overdue notice price%* and *%current fine%*, which have the introductory phrase, are used as default. In the place of variable values, the relevant price from the valid price list of the library or department (if the price list is different by departments) is automatically displayed on the prepared overdue notices. If a library wants to define a different price display and introductory phrases, the default data type must be edited or new content versions must be defined where the variable values will be used, in the place of which the relevant values will be automatically displayed in the group of overdue notices (see function *Insert variable value* further in this chapter).



Tip:

The library can decide to include their logo or a photo of the signature of the responsible person in the library on the overdue notice report in A4 format.

The logo will be displayed in the overdue notice header (above the address of the overdue notice recipient. If the library decides to include their logo on the overdue notices in A4 format, the logo will also be displayed on registration forms that are saved after the member's signature is confirmed with the signature pad (see chapter 3.1.4).

The picture of the signature is displayed under data type 6 (signature on overdue notices). The library can only use one signature on all overdue notices (it is not possible to use different signatures for each department or a certain number of overdue notices).

To include the logo or signature on overdue notices, the library must send the logo (defined as an image, saved in jpg or gif format, maximum size 25 x 176 mm) and/or the signature (defined as an image, saved in jpg or gif format, maximum size 25 x 80 mm).

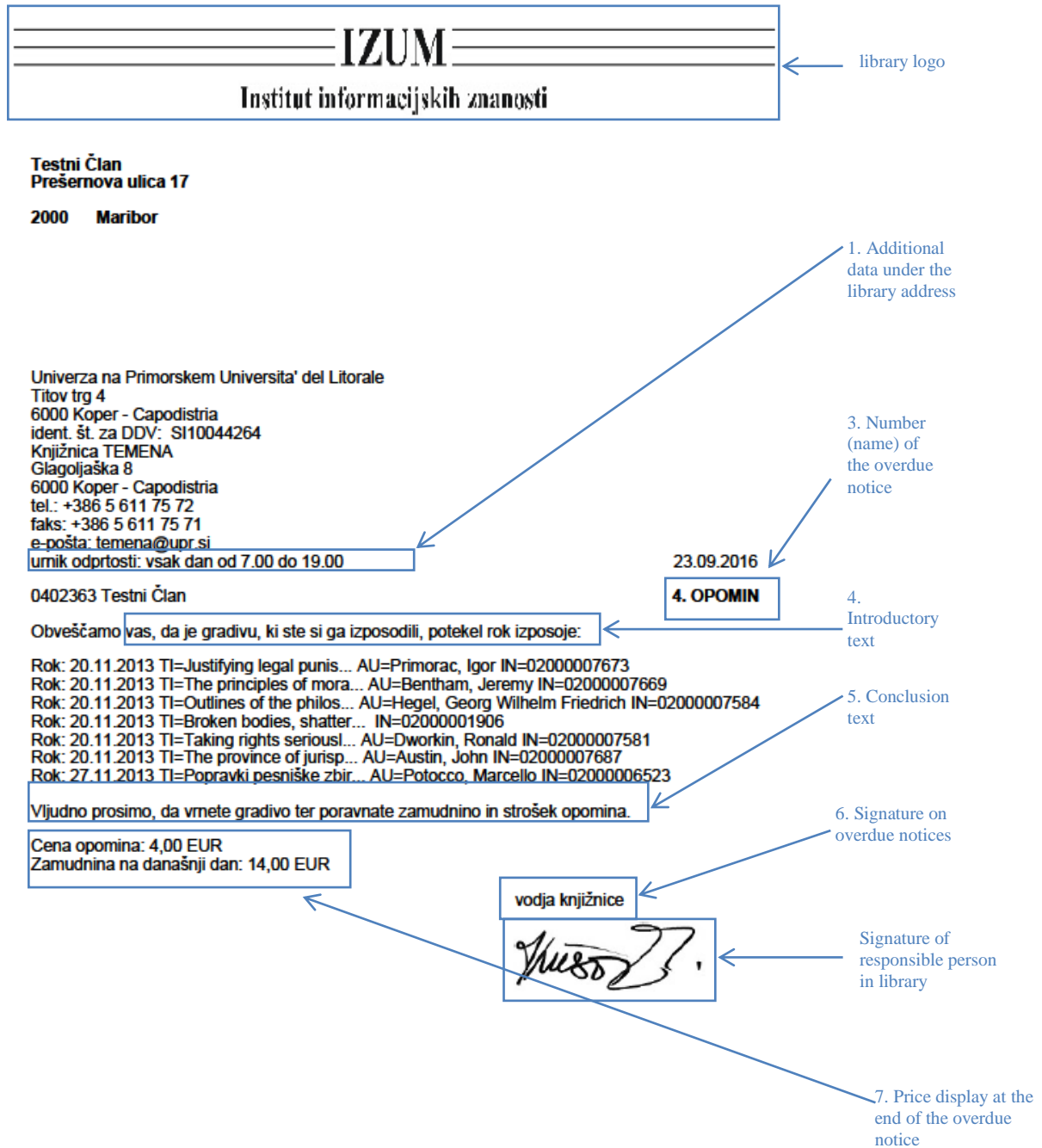


Figure 8.5-1: Overdue notice template with data type display for A4 format

In the bottom part of the window is the “Field for editing the selected data type”, where the content of the data, which is displayed on the overdue notice forms, is edited. You can have different content versions saved for one data type. Each content version is in its own numbered row. For the selected data type, select the desired content version that you wish to edit. The selected content will be displayed in the bottom part of the window, where you can change it accordingly.



Note:

For the data type Additional data under the library address there is no content in the beginning.



Note:

When editing data, the % sign must not be used as it is used only for entering variable values.

Under the field for editing content of the selected data type, the following functions or buttons can be used:

- **Insert variable value**

In the procedure of editing data on forms, the previously prepared variable values can be used, in the place of which the actual value will be automatically displayed. You can insert the following variable values:

- member's total debts
Display of total debts for the member.
- debts of all overdue notices received
Display of total debts of all overdue notices received for the member.
- 1st overdue notice price
Display of the price for the first overdue notice (1ON) according to the valid price list of the library or department, if the price list is different by departments.
- 2nd overdue notice price
Display of the price for the second overdue notice (2ON) according to the valid price list of the library or department, if the price list is different by departments.
- 3rd overdue notice price
Display of the price for the third overdue notice (3ON) according to the valid price list of the library or department, if the price list is different by departments.
- 4th overdue notice price

Display of the price for the fourth overdue notice (4ON), according to the valid price list of the library or department, if the price list is different by departments.

- Current fine
Display of the current fine for the member on the day when preparing the overdue notice.
- fine for books – FIN01
Display of the price for the debt FIN01 according to the valid price list of the library or department, if the price list is different by departments.
- fine for serials – FIN02
Display of the price for the debt FIN02 according to the valid price list of the library or department, if the price list is different by departments.
- fine for non-book material – FIN04
Display of the price for the debt FIN04 according to the valid price list of the library or department, if the price list is different by departments.
- received overdue notice
Display of the relevant overdue notice number or name on the day when preparing the overdue notice
(1st OVERDUE NOTICE, 2nd OVERDUE NOTICE, etc. or e.g. DIRECTOR'S NOTICE).
- received overdue notice price
Display of the price of the overdue notice on the day when preparing the overdue notice according to the valid price list of the library or department (if the price list is different by departments).
- received overdue notice number
If you wish to name the overdue notices differently or use this option also when editing language versions for the creation of forms in other languages, you can use the variable value for the display of the numeric value of the received overdue notice on the day when preparing the overdue notice (e.g. 1 for the first overdue notice, 2 for the second overdue notice, etc.).

Example:

Example of usage:

%received overdue notice number%. notification about a loan period expiry date

In language versions, you can avoid entering different forms of one data type, as all language versions can be edited by using one content version of the data type 3. *Overdue notice number (name)*.

- **Save**

Use this button if you wish to save the changed content version.



Tip:

When editing data, you can use the *Insert variable value* function. By using this function, the selected variable values can be entered, in the place of which the actual value will be automatically displayed on the prepared overdue notices (*received overdue notice number, member's total debts, etc.*).

- **Add**

Use this button when you wish to define new content for the selected data type. You can do this by highlighting the content version under the selected data type, editing it accordingly or updating it and clicking the **Add** button. You can add more content versions for one data type. Each newly added version will get its own current number, which cannot be changed. The order is not always based on the current number.

- **Delete**

Use the button when you wish to delete the defined content version in the upper right part of the window. You can do this by highlighting the content version for the selected data type and clicking the **Delete** button. The content version for this form group will be permanently deleted.



Note:

If the content version is used in the group of overdue notice forms, it cannot be deleted. You will receive an automatic notification about where in the table the content version was used.

- **Up**

Use the **Up** button when you wish to move the selected content version in the upper right part of the window one or more rows up. When you move the content version (row) up, its current number does not change as it is determined by the content version for the data type.

- **Down**

The **Down** button is used when you wish to move the selected content version in the upper right part of the window one or more rows down. When you move the content version (row) down, its current number does not change as it is determined by the content version for the data type.

Buttons for saving and cancelling the creation of overdue notice forms:

- **OK**

Use the **OK** button to save the existing or newly created group of overdue notice forms.

- **Cancel**

Use the **Cancel** button to exit the window for editing data on overdue notice forms without saving.

8.5.1.1 Editing data on overdue notice forms

You can edit data on overdue notices for each overdue notice separately. In the **Editing data on overdue notice forms** window, you can edit data for up to four overdue notices. If a library uses fewer overdue notices (set up by a special parameter upon the library's request), the data is defined only for the number of overdue notices that are sent to its members (e.g. only for the first two overdue notices). A library does not have to edit forms for the following overdue notices as they are not taken into account in the procedure of creating overdue notices.

If a library has more automated departments, the data on forms is edited only for the departments where overdue notices are prepared by performing the procedure of creating overdue notice forms; for other departments, forms do not have to be edited.

In the **Editing data on overdue notice forms** window is a table where numeric values are displayed in individual cells for a specific overdue notice in the home library or in an individual department (in libraries with departments).

There are seven numbers in each cell, separated by a comma, which represent different data types on overdue notice forms. In the beginning, the default value in the cells is *1*; these values, which define the content of displayed overdue notices, can be changed by the library and are the basis for the creation of the report *LOAN-ON-01: Overdue notices*.

Procedure

1. Highlight with a mouse click the selected cell under the desired number of the overdue notice for the home library or for an individual department (applies to libraries with departments).
2. Then in the upper right part of the window, select the desired data type and the content version for this data type from the drop-down list. Double-click to confirm the selected content version to be used on the form. During this procedure, the current number of the content version (displayed in the beginning of the row) will be transferred to the selected cell in the place specified for this data type (e.g. data type *6. Signature on overdue notices* will be transferred to the sixth place in the cell with the current number of the content version).

Continue editing the overdue notice forms in each cell (depending on the number of overdue notices in the library), until their content is edited for all overdue notices in the home library or in individual departments (applies to libraries with departments).

3. Save the changes in the form groups by clicking the **OK** button.

**Tip:**

In libraries with departments, you can copy the content of an individual cell to other cells (e.g. the content of the 1st overdue notice is the same or similar to all the following overdue notices in other departments).

Perform the copying procedure by highlighting the selected cell and pressing the key combination <Ctrl> + <C>. Then highlight with a mouse click the desired cell or more cells at the same time (e.g. for all overdue notices in all departments) and paste the content by pressing the key combination <Ctrl> + <V>. If only one content version of a specific data type (e.g. 6. Signature on overdue notices) is different for an individual department, change only this content version in the selected cells of this department.

8.5.1.1.1 Language versions of overdue notice forms

A library that enables sending overdue notices to its members in different languages can edit overdue notice forms in several language versions. The overdue notice forms are created in the domestic language but you can create up to five different language versions.

Procedure

1. For the selected data type, in the upper right corner of the **Editing data on overdue notice forms** window, highlight the content version in the domestic language.
2. By clicking the right-hand mouse button, start the procedure of entering additional language versions.

The **Language versions of overdue notices** window will open, which is divided into five fields with different initial rows (1st language version, 2nd language version, etc.).

3. Place the mouse cursor on the field of the selected language version and enter the data in another language. You can enter up to five language versions of the data that will be used when creating the report *LOAN-ON-01: Overdue notices*.

During the procedure of editing data, you can also use the *Insert variable value* function (see chapter 8.5.1).

**Note:**

When editing the data, do not use the % sign, as it is used only for entering variable values.

**Note:**

*A specific language version is taken into account when creating the overdue notice for an individual member provided that the relevant language version is selected for the member in the editor (**Object /Edit method**) under the »Language of overdue notices« attribute (see chapter 3.1.2.1).*

4. Save the changes by clicking the **OK** button.



Note:

Language versions of the data must be entered for the data types for which a library wishes to be displayed on created overdue notices in one of the language versions!

8.5.2 Editing forms

Select the option of editing overdue notice forms if you wish to change or update the data on the already prepared overdue notice forms.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Editing forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.

The **Form groups** window will open.



Note:

The default overdue notice forms cannot be edited. If a library has not yet prepared new overdue notice forms and in the beginning uses the Editing forms procedure, a notification will be displayed, informing you that editing default forms is not possible. A library must create new forms on the basis of the default forms.

3. Select one of the previously prepared groups of overdue notice forms and confirm it by clicking the **OK** button.

The **Editing data on overdue notice forms** window will open. In the title row, the name of the group of overdue notice forms that was selected for editing is displayed.

Continue the procedure of editing forms in the **Editing data on overdue notice forms** window in accordance with the instructions (see chapter 8.5.1).

8.5.3 Activating forms

In a library that does not interfere with the procedures of creating overdue notice forms, the default forms are valid. Activate new or already existing groups of overdue notices only after you have edited all the required data (also language versions, if necessary) for the group of overdue notice forms and after you have saved the data.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Activating forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
3. The **Form groups** window will open, where you can select one of the previously created groups of overdue notices that you wish to activate for the procedure of creating overdue notices in the report *LOAN-ON-01: Overdue notices*.

You can also select the default overdue notice forms.

4. Confirm the selected form group by clicking the **OK** button.

The currently valid form group will be displayed in the upper part of the **Creation of overdue notices** window.

8.5.4 Deleting forms

A library can delete the already prepared groups of overdue notice forms if it no longer needs them. By performing this procedure, an individual group of overdue notices will be permanently deleted.



Note:

The default overdue notice forms cannot be deleted. Also, the currently valid overdue notice forms cannot be deleted. When selecting the valid form group, you will receive an automatic notification, informing you that the group cannot be deleted.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Delete forms** radio button.
2. Confirm the procedure by clicking the **Select** button.
3. The **Form groups** window will open, where you can select one of the prepared groups of overdue notices that you wish to permanently delete.



Note:

If there is only one group of overdue notice forms prepared in your library, an automatic question will appear asking you whether you wish to delete this form group.

4. Confirm the selected form group by clicking the **OK** button.

The forms will be deleted only after a question will appear in the window, in which you must confirm the deletion by clicking the **OK** button. You can cancel the procedure of deleting the form group by clicking the **Cancel** button.

5. The selected form group will be deleted and you will be returned to the **Creation of overdue notices** window.