



Automating Postal Reservations

Kathryn Buttel

Senior Library Systems Support Advisor

COSI (EMEA)

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Background

We provide a postal service to **part-time** students

Introduced Books by Mail to staff during Covid

Approximately **25%** of our reservations in the last year were postal

For certain categories of students (e.g. apprentices), no 3rd party systems are allowed to have home addresses

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Mail Service

Configuration > Circulation
Configuration > Mail Service /
Mail Rule

Set a location for Items for Mail
to show in Enterprise

Set Mail Rules, similar to
circulation rules

Items go INSHIPPING when the
hold is trapped

Credit Reason

Credit Rule

Mail Service

Mail Rule

Shipping Cost

Card Reader Device Type

Circulation Configuration Offline Reports Requests Serial Control Utility

Mail Rule x

Mail Rule

Name: DEFAULT PT

Description: Default part time

Library: All

User profile: BHL-STDNT,DOCTOR-PT,EXEC-MBA,EXT-BHL-ST,EXT-DC

Item type: BOOK,IN-DEMAND,REPORT,SHORT-LOAN,STANDARD,TH

Select All

Select All

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Existing workflow

Customer places reservation and item pulled
from the shelf

Staff email customers for postal address
details

Customer responds with address

Item issued in Workflows and security
removed

Item packaged and mail out form filled and
address written manually



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Problems



No access to emails



Time consuming



Prone to error

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Mail out form - Royal Mail

SIGNED FOR, SPECIAL DELIVERY & INTERNATIONAL SIGNED FOR

Please select type of service required

- ☐ Royal Mail Tracked and Signed for, 1st class
- ☒ Royal Mail Special Delivery 1st Class 09.00 am ☐ 13.00hrs ☐ 17.00 hrs ☒
- ☐ Royal Mail Special Delivery 1st Class Saturday service
- ☐ Royal Mail International Tracked and Signed
- ☐ CITY SPRINT – same day delivery – please ask for information

Office Use only
Tracking No
Cost £

Recipients Information- please type or use block capitals to avoid mistakes or delays

Name	Kathryn Buttel
Company name	
Address	Example house Example street Example town
Postcode	EX1 234

Senders Information:

Budget code: AA/001R/ SP/Special	Date 20/05/2026
Name: Kathryn Buttel	Centre/PSU: Student Experience
Tel no: 754444	Email: library@cranfield.ac.uk

To avoid delays, where possible, please type the details to ensure information is legible and attach form to letter/parcel

Letters without this form will be treated as non-trackable post in UK, Europe, World.
If you have any queries, please contact the Mail Room – Building 108, T: 4775
E: facilities@cranfield.ac.uk

Mail Out Form - Royal Mail v1 April 2022

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What we wanted

Automate as much as possible

Users manage their own postal address for accuracy and to save staff time

This information to be automatically put into the mail out form



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The **INSHIPPING** item status is an easy way of filtering the data for notices and reports



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Patron Edit

Patron Edit allows users to **edit their own records**

Opt in so no GDPR issues

Address 3 not touched by the University admin system data

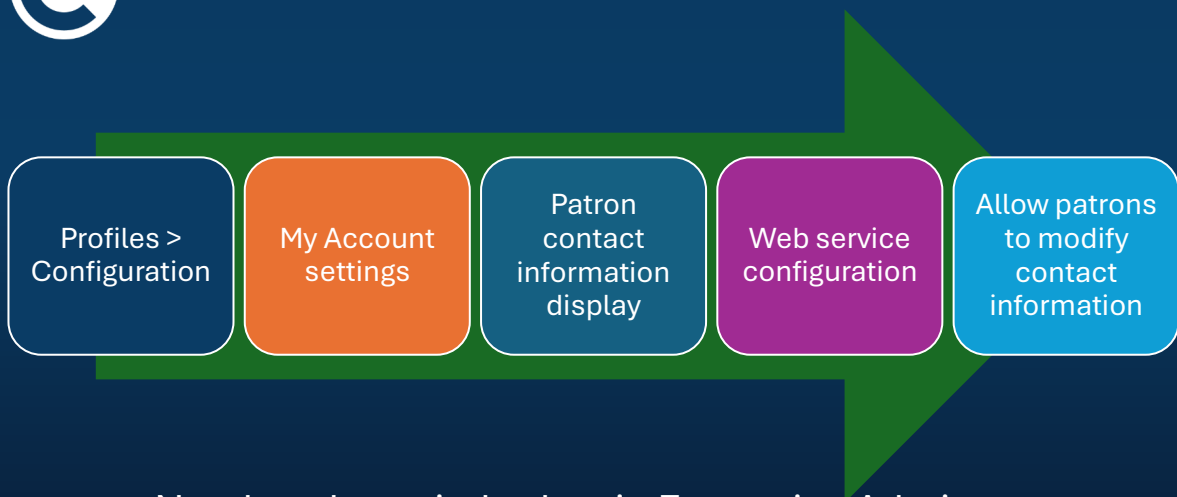
Customisable using Web Services

Easy to access, users already familiar with My Account in Enterprise

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Patron Edit



Needs to be switched on in Enterprise Admin

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DS_CLIENT				NONE	GUEST	PATRON	STAFF	ADMIN	Hide Enabled	Hide Disabled	Reset	Change	
☐ Select All		Enable Selected		Disable Selected		Import		Export					Change
☐	DS_CLIENT	/circulation/circRecord/uploadOfflineTransaction						STAFF			POST	Change	
☐	DS_CLIENT	/circulation/circRecord/uploadOfflineTransaction						ADMIN			POST	Change	
☐	DS_CLIENT	/circulation/holdItemPullList						NONE			GET	Change	
☐	DS_CLIENT	/circulation/holdItemPullList						STAFF			GET	Change	
☐	DS_CLIENT	/circulation/holdItemPullList						ADMIN			GET	Change	
☐	DS_CLIENT	/circulation/holdItemPullList/pullListEntry						NONE			GET	Change	
☐	DS_CLIENT	/circulation/holdItemPullList/pullListEntry						STAFF			GET	Change	
☐	DS_CLIENT	/circulation/holdItemPullList/pullListEntry						ADMIN			GET	Change	
☐	DS_CLIENT	/circulation/holdRecord						NONE			GET PUT DELETE	Change	
☐	DS_CLIENT	/circulation/holdRecord						PATRON			GET PUT DELETE	Change	
☐	DS_CLIENT	/circulation/holdRecord						STAFF			GET PUT DELETE	Change	
☐	DS_CLIENT	/circulation/holdRecord						ADMIN			GET PUT DELETE	Change	

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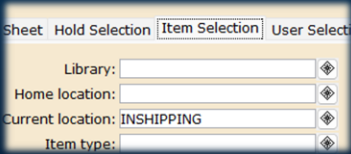


User Navigation

We needed a way of communicating with the user and navigating them to Enterprise

HTML notice allowed us to do that

Symphony report for postal reservations / any items INSHIPPING



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HTML pickup

A new **HTML pickup notice** was created and set to run at intervals

Report filters on Item Status
INSHIPPING

Contains a link to **Patron Form** in Enterprise

Cranfield University Library Services

We're ready to post your reservation – please confirm your address

Hello [[firstName]],

The items listed below are now available.

Please [check and update your postal address](#) with your UK or BFPO address.

Please [let us know](#) if you no longer require this item.

Thank you.

Title: [[title]]

Author: [[author]]

Sincerely,
The staff at Cranfield University Libraries

We take your data privacy very seriously and will only use your information to provide the products and services you have requested from us. We will not sell, license or trade your information without your consent. For more information about how your data will be processed, please see our [privacy policy](#). Where required, we may share your information across the University and with our commercial subsidiaries. You can opt out of marketing communications from us at any time.

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Library Services



Everything

General Search

SEARCH

[Advanced Search](#)

EJOURNALS FINDER

Personal Information

Checkouts

Reservations

Interlibrary Loans

▼ Buttel, Kathryn (Mrs)



► Preferences

Your status: OK

Checkouts

Total:



Reservations

Total:



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Recreating the Mail out form in BCA

The data had to be live – ODBC
Connector offer “**Connect live**” option

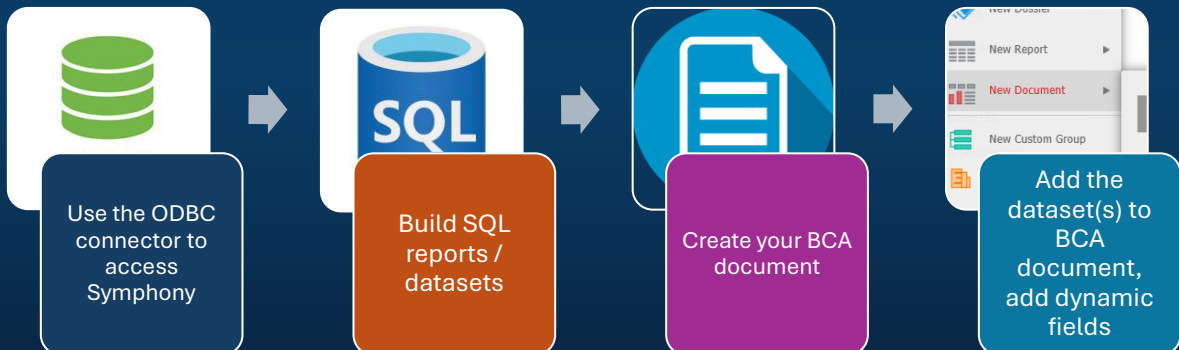
BCA documents is very flexible for
recreating the form

Easy to access for staff from **a link**
directly to the report results

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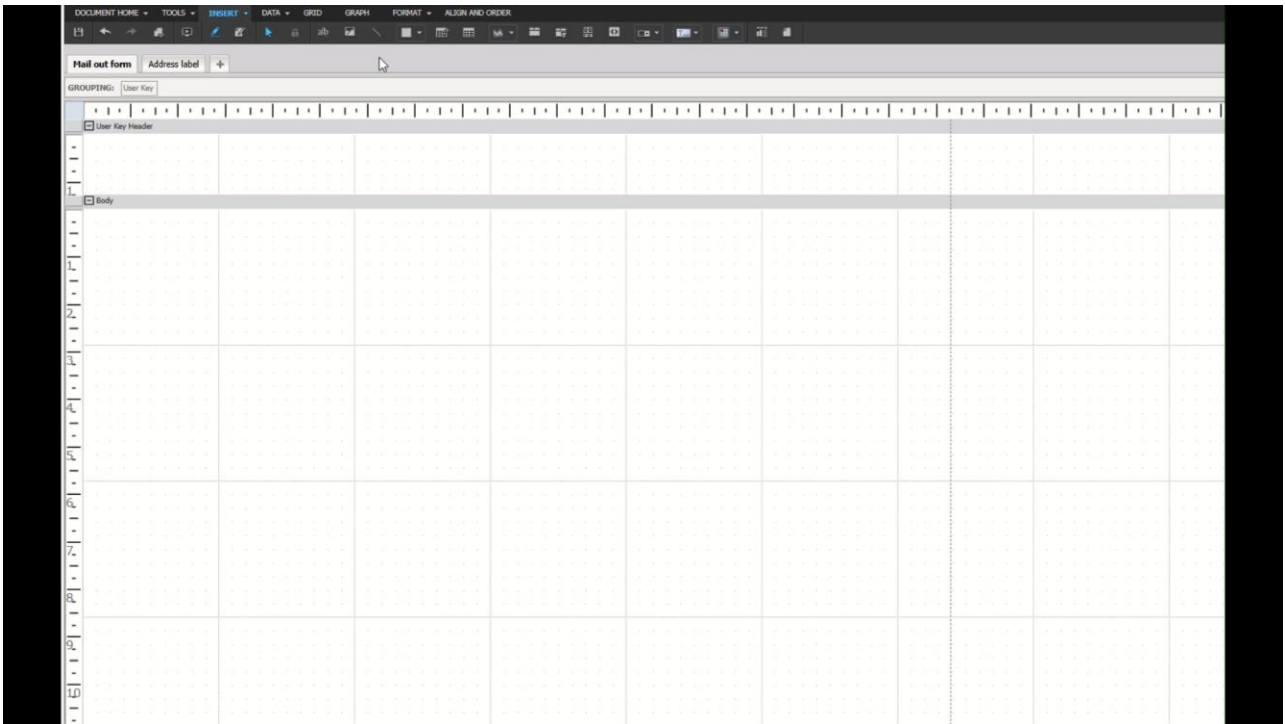


Using the ODBC connector for live data



We use “Connect live”

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BCA reports

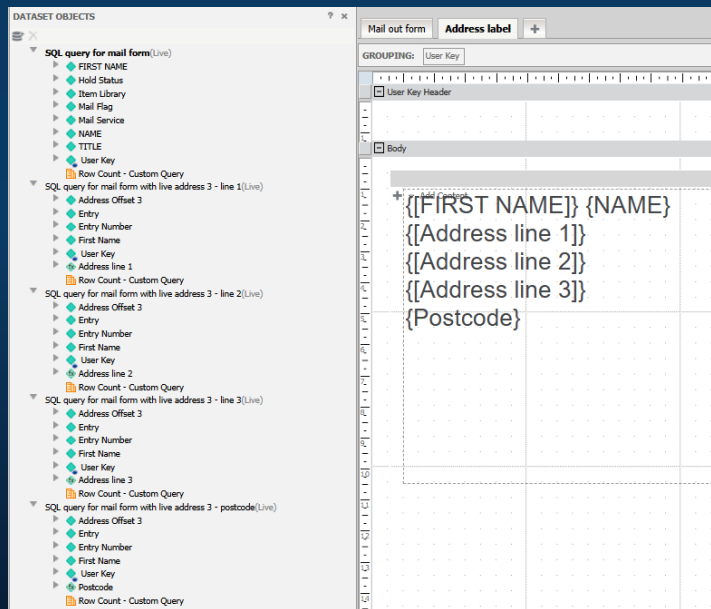
Address data is VED data,
so Entry Number essential

Separate report for
address line each line /
Entry Number

Entry is the data

Inner join on User key

Group by User Key



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ODBC connection

Add External Data > Databases

Build a Query

Select database and table, required fields

Edit SQL to type directly

Finish > Connect live

Instructions available at <https://support.sirsidynix.com/kb/165664>

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BCA CRAN > Home

Create

Recents

Shared Reports

My Reports

History List

My Subscriptions

Browse

Shared Reports

My Reports

History List

My Subscriptions

Analyse

Create Dossier

Add External Data

Upload MicroStrategy File

Develop

Create Report

Create Document

Create Filter

Create Prompt

Create Metric

Create Custom Group

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SQL reports

```
select "HOLD"."ITEM_LIBRARY" "ITEM_LIBRARY",
"HOLD"."MAIL_FLAG" "MAIL_FLAG",
"HOLD"."HOLD_STATUS" "HOLD_STATUS",
"HOLD"."MAIL_SERVICE" "MAIL_SERVICE",
"USERS"."TITLE" "TITLE",
"USERS"."FIRST_NAME" "FIRST_NAME",
"USERS"."NAME" "NAME",
"USERS"."USER_KEY"
from "SIRSI"."USERS" "USERS"
join "SIRSI"."HOLD" "HOLD"

on ("USERS"."USER_KEY" = "HOLD"."USER_KEY")

where (((("HOLD"."ITEM_LIBRARY" <> 6)
and ("HOLD"."MAIL_SERVICE" = 1)
and ("HOLD"."HOLD_STATUS" = 2)
and ("HOLD"."MAIL_FLAG" = 'Y')))
```

This is pulling user information and ensuring only postal reservations are retrieved

```
select "USERS"."FIRST_NAME" "FIRST_NAME",
"USERS"."USER_KEY" "USER_KEY",
"USERS"."ADDRESS_OFFSET_3" "ADDRESS_OFFSE
T_3",
"USERXINFO"."ENTRY" "ENTRY",
"USERXINFO"."ENTRY_NUMBER" "ENTRY_NUMBER
"
```

```
from "SIRSI"."USERS" "USERS"

join "SIRSI"."USERXINFO" "USERXINFO"
on ("USERS"."ADDRESS_OFFSET_3" = "USERX
INFO"."OFFSET")
```

```
where "USERS"."AVAILABLE_HOLDS" <> 0
and "USERXINFO"."ENTRY_NUMBER" in (9023)
```

4 separate reports running, each with a different Entry Number for the relevant address line

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Mail out form - Royal Mail

SIGNED FOR, SPECIAL DELIVERY & INTERNATIONAL SIGNED FOR

Please select type of service required.

- ☐ Royal Mail Tracked and Signed for, 1st class
☒ Royal Mail Special Delivery 1st Class 09.00 am ☐ 13.00hrs ☐ 17.00 hrs ☒
☐ Royal Mail Special Delivery 1st Class Saturday service
☐ Royal Mail International Tracked and Signed
☐ CITY SPRINT – same day delivery – please ask for information

Office Use only
 Tracking No.
 Cost £

Recipients Information- please type or use block capitals to avoid mistakes or delays

Name	Kathryn Buttel
Company name	
Address	Example house Example street Example town
Postcode	EX1234

Senders Information:

Budget code: AA/001R/SP/special	Date 20/05/2026
Name: Kathryn Buttel	Centre/PSU: Student Experience
Tel no: 794444	Email: library@cranfield.ac.uk

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☐ Royal Mail International Tracked and Signed
☐ CITY SPRINT – same day delivery – please ask for information

Office Use only
 Tracking No.
 Cost £

Recipients Information- please type or use block capitals to avoid mistakes or delays

Name	Kathryn Buttel
Company name	
Address	Testing house Testing street Testing town
Postcode	WE18TST1234

Senders Information:

Budget code: AA/001R	Date: 12/04/2026 16:45:18
Name	Centre/PSU: STUXEP
Tel no: 38484	Email: library@cranfield.ac.uk

Letters without this form will be treated as non-trackable post in UK, Europe, World.
 To avoid delays, where possible, please type the details to ensure information is legible and attach form to letter parcel.
 If you have any queries, please contact the Mail Room – Building 108, T: 4775
 E: facilities-mailroom@cranfield.ac.uk

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Printing

Staff click on the link provided:

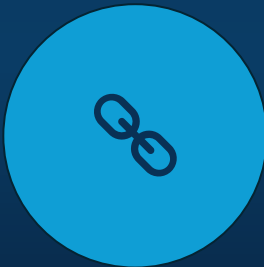
<https://emea1-microstrategy.bc.sirsidynix.net.uk/bcanalytics/asp/Main.aspx?evt=2048026&src=Main.aspx.2048026&subscriptionID=FA536883A248FB10129A688AD5EFCF86&Server=EMEA-BCA-MS-INTEL-1-1.BC.SIRSIDYNIX.NET.UK&Project=BCA%20CRAN&Port=0&share=1>

To create link in BCA select Document Home > Share > Email link

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Advantages



More **joined up**, faster process, less mistakes



More **staff** using BCA



Easy to access form with direct link to BCA

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Mail Items Wizard

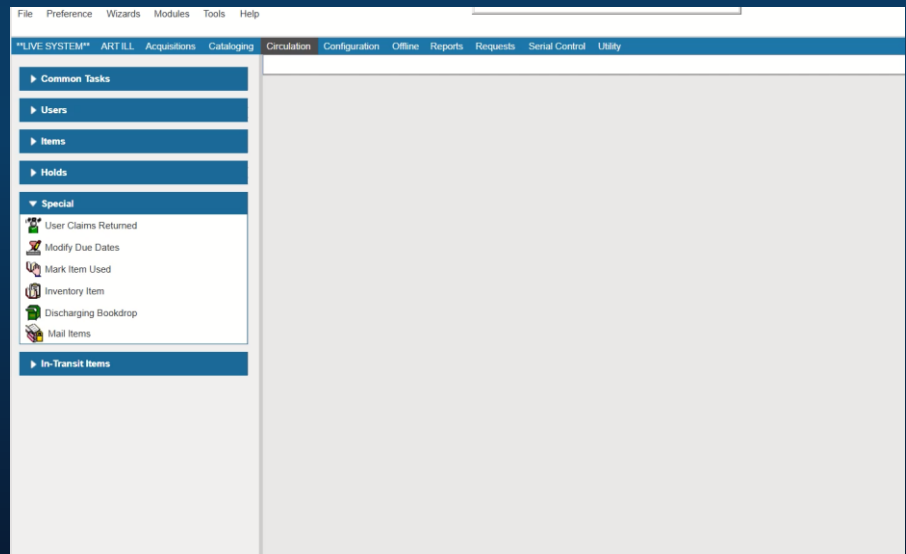
Circulation > Special
> Mail Items

Search Item ID

Checkout to user

Confirm Shipment

Print Package slip if
required



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New workflow

Items pulled from the shelf and trapped; status is INSHIPPING

Staff run BCA report from direct link and print mail out forms and labels

User receives email and adds address through Patron Edit in Enterprise – *first time only*

Staff run BCA report from direct link and print mail out forms and labels

Items processed through the Mail Items wizard and posted out

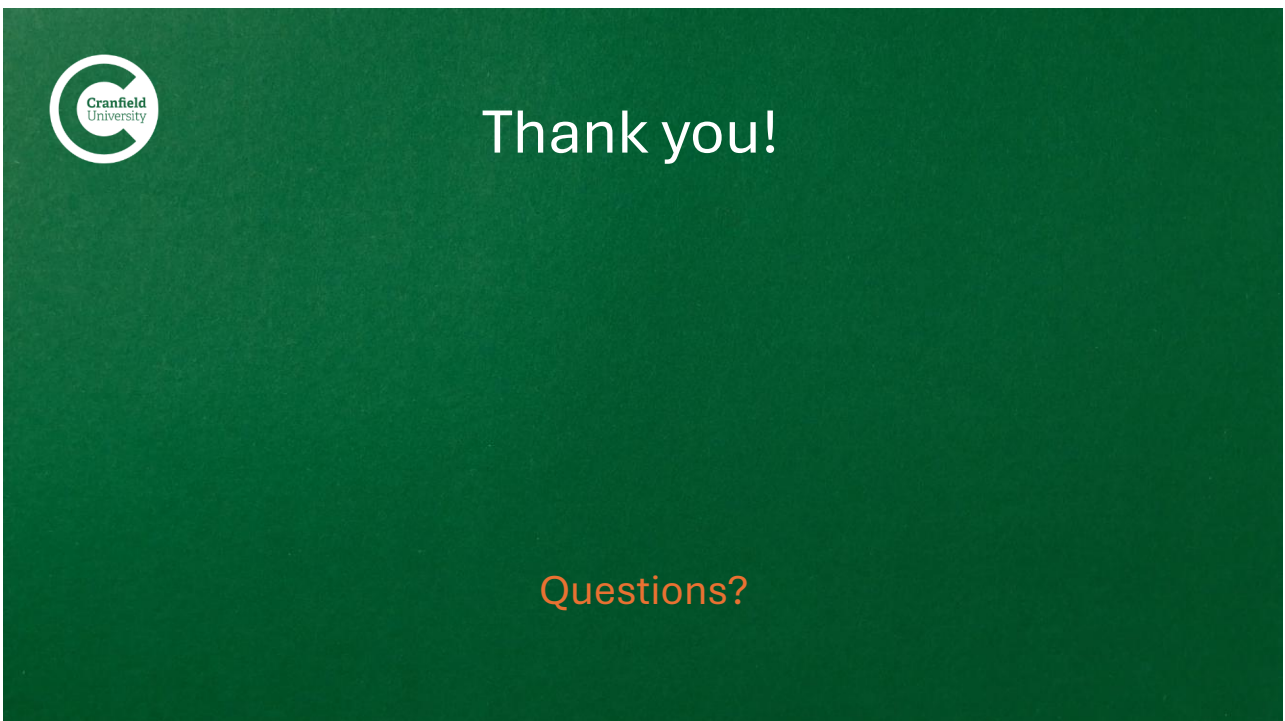


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The result is happier customers (and staff)!

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Thank you!

Questions?

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