CHICAGO PUBLIC LIBRARY
Customizing Polaris Notification Emails

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Agenda (1)

- WebAdmin
- Where email notice templates live
- Data sources, data sets, parameters, etc.
- Removing elements from the body
- Remove repeatable elements
Agenda (2)

• Customizing the salutation
  – RTrim, Environment.NewLine

• Adding sentences, paragraphs, etc.

• Dealing with multiple languages
  – Getting a patron’s preferred language (add a dataset)
  – Using iif to hide additions if patron’s preferred language is not English
Agenda (3)

• Dealing with multiple languages (cont.)
  – Using choose to supply your own translations
• Customize based on pickup location
  – choose (different urls)
  – iif (for example, closure note)
Agenda (4)

• Ideas to consider
  – adding similar titles
  – adding upcoming events

• Your Ideas

• Testing customized notices

• Pros and cons of customizing email messages
CPL Context

• single library
• hosted
• 5 languages (and perhaps a few more on the way)
• only send out plain-text notices
Edit Tool

Language Options

Product: Notices
Organization: System: Chicago Public Library
Language 1: English - United States
Language 2: English - United States

Limit Options

Specific string ID:
String contains:
☐ Only show customized strings

Load Strings

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Where email notice templates live

• Original
  – Polaris > Notices > Email

• Custom
  – Polaris > Custom > All > Notices > Email
  – Polaris > Custom > Harold Washington Library Center > Notices > Email
  – Consortia?
Reporting Branch

- For hold pickup notices, it’s the pickup branch.
- For all other notices*, it’s the patron’s registration branch (OrganizationID in the Patrons table)

* As far as I know
Removing Elements from the Body

- Date, blank lines, from, to, return address, barcode, etc.
  - return address has the only mention of the pickup location
- You’ll likely scramble the order of the elements if you try to add rows.
Customizing the Salutation

"Dear " + RTrim(First(Fields!PatronName.Value)) + ",," + Environment.NewLine

RTrim – removes extra spaces from the right of the string
Environment.NewLine – carriage return (also vbcrlf)
Adding Language

View your holds and other account information: https://www.chipublib.org/holds

• No period (to support automatic linking)
• Separate out URLs to support translation

Getting the Patron’s Language (Add a Dataset)
Add a Dataset: Query (1)

1. Give it a name
2. Select a data source.
3. Copy and paste a query.
select languageid from polaris.polaris.patronregistration with (nolock)
where patronid = @patronid
Add a Dataset: Parameters

Here we map the parameter @patronid to our variable @PatronID so that we get the preferred language of the current patron.
No live data source?

You’ll need to explicitly map the field `LanguageID` to the field source `LanguageID` and the parameter name `@patronid` to the parameter value `@patronid` using the Add button on both tabs.
Hiding Additions with iif

(If the addition is just “nice to have,” you may want to hide it from translated notices rather than translate it.)

Providing Your Own Translations with choose

Get LanguageIDs from the Languages table:

```sql
select * from polaris.polaris.languages with (nolock)
```
Providing Your Own Translations with choose

choose(
Sum(Fields!languageid.Value,"Language"),
"Hello", "Hola", "", "", "", "",
"你好", "dzień dobry", "", "", "",
"مرحبًا", "", "", "",
"नमस्ते")
...with switch

switch(
    Sum(Fields!languageid.Value, "Language") = 1, "Hello",
    Sum(Fields!languageid.Value, "Language") = 2, "Hola",
    Sum(Fields!languageid.Value, "Language") = 8, "你好",
    ...
)
Exercise 1

Set up the notice so that if the patron’s language is English, the salutation reads: “Dear John Smith,”.

If the patron’s language is Spanish, use “Estimado(a) John Smith,”.

If the patron’s language is something else, just use: “John Smith,”.
Adding Language (2)

Albany Park hours and address: https://www.chipublib.org/AlbanyPark

- Fields!ReportingBranch.Value = name of pickup branch
- Fields!PickupOrganizationID.Value = OrganizationID of pickup branch
Different URLs depending on pickup location

Sample Code

Exercise 2

If the patron’s pickup branch is 34, then the first sentence should read:

The material you requested is ready for pickup in the Popular Library on the 1st floor of Harold Washington Library Center.

Otherwise, this should read:

The material you requested is ready for pickup at Albany Park.

Fields!NoticeText.Value = “The material you requested is ready for pickup”
Exercise 3

Make it so that if the patron’s language is not English, they just see Fields!NoticeText.Value as the first paragraph and not any of the customizations.
Location Closing Notifications

To show only to patrons picking up items at that location:

iif(Fields!PickupOrganizationID.Value=75,
iif(now() < #7/1/2019 00:00:00#,"***West Chicago Avenue Branch will close for carpet replacement beginning Monday, July 1. We expect the branch to reopen on Monday, July 22.***" + Environment.NewLine + Environment.NewLine,"""),"""
If there’s time...

Almost Overdue Reminder RDL files:
bit.ly/2IcufB1
(second character is an uppercase i)
Similar Titles

Get an item that’s on the shelf at the pickup branch and similar to the pickup item (class, BISAC, genre) and suggest that they also consider checking out this item.

RDL and stored procedure: goo.gl/Sr5TVW
Dear TEST CARD,

The material you requested is ready for pickup at Lincoln Park.

Title: Here come the ABCs
Author: They Might Be Giants (Musical group)
Format: Music CD
Held until the library closes on: 9/14/2018

View your holds and other account information: https://www.chipublib.org/holds

Lincoln Park hours and address: http://www.chipublib.org/LincolnPark

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You might also consider...

Title: All wound up
Author: Vapid, Dan.
Format: Music CD
Currently available at: Lincoln Park
Learn more: https://chipublib.bibliocommons.com/item/show/1783561126?utm_source=hpn

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Upcoming Events

Add one or two upcoming events taking place where a coming-due item was checked out.

RDL and stored procedure: goo.gl/Sr5TVW
Most items may be renewed up to 15 times as long as another patron has not requested them.

Museum passports and interlibrary loan materials may not be renewed.

Questions? Please call or visit any CPL location. See hours and locations at https://www.chipublib.org/locations

Please disregard this email if you've already renewed or returned your material.

******** Upcoming Events ********

Author Jonathan Eig discusses "Ali: A Life"
Harold Washington Library Center
Tuesday, January 9 at 6:00 PM
Society of Midland Authors and Chicago Public Library present noted author Jonathan Eig, discussing his recent book titled Ali:...
Recommended for: Adults
Learn more: https://chipublib.bibliocommons.com/events/59e8eb30559e28250d33326?utm_source=cdn

Author Todd Mayfield discusses Traveling Soul: The Life of Curtis Mayfield
Harold Washington Library Center
Wednesday, January 17 at 6:00 PM
Todd Mayfield is Curtis Mayfield's second-oldest son, and recently wrote the definitive biography of his father, Traveling Soul:...
Recommended for: Adults
Learn more: https://chipublib.bibliocommons.com/events/5a281c4b202ef92f00c0f981?utm_source=cdn

******** Upcoming Events ********
Capturing Click Throughs

Add a short key-value pair at the end of urls (for example, s=cdn). Then look for page hits whose urls end in this key-value pair.
What would you like to do with email notices?
Testing Notices

• set notification option for all patrons to none (null)
• wipe out all patron emails (just to be sure)
• turn on email notices in second environment
Pros of Customizing Notices

• communicate library policy
  – Most items may be renewed up to 15 times as long as another patron has not requested them.

• inform patrons who use a particular location (and only those patrons) about an upcoming closure

• promote collections and events
Cons of Customizing Notices

• Requires extra work on part of staff
• Additional translation work may be required
• May complicate support
• Increases time for notices to go out
Evaluations, questions, complaints, etc.