Building a Home-Brew Text Message Notification System for Sierra

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Building a Home-Brew Text Message Notification System for Sierra

Abstract
"I am not a developer" is a phrase I say more than I want. However, programming is something I've wanted to learn for a long time. When patrons began asking for text message notifications for circulating items, I took on the challenge to try to learn something new, and hacked together a basic text notification system that is both affordable and serves patron needs. Using the narrative of this tool's creation as a foundation, this presentation will provide resources to get started in web development for Sierra using SQL, PHP, and Twilio.

Keywords
text message notifications, library catalog, Sierra

Disciplines
Cataloging and Metadata | Library and Information Science

Comments
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Building a Home-Brew Text Message Notification System for Sierra

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About Gettysburg College

- Private, 4-year liberal arts college
- 2,600 students
- Turnkey Sierra platform since 2013
- Library/IT are not merged
I’m not a developer.
Especially when something breaks.

YOUR CODE'S BAD

AND YOU SHOULD FEEL BAD
Why build something?

• Lots of fines (and complaints about them) for hourly items like laptop chargers, but no preemptive reminders
• Students “don’t use email”
• III SMS product = $$$
• Patron load process interferes with using the 7175551234@provider.com workaround in the email field
Solution

Foundation
  – David Noe’s IUG 2015 presentation “Automating Custom Patron Notices and Messages Using SQL”
  – Twilio text notification add-on for ILLiad 8.6

Idea
  – Use PHP to execute SQL query
  – Pass data along to Twilio to send text messages
Challenges …

So how do we …

– Figure out the right SQL query?
– Get the data to Twilio?
– Find a server to run the PHP script?
– Get patrons signed up?
– Build the thing without IT/developer assistance?
Why PHP?

• It’s what I (kind of) know!
• Can query SQL database and connect to the Twilio API
• However, IT won’t let us run PHP on local servers …
Running the Script: Reclaim Hosting

• Built for educators/institutions
• Great technical support
• Inexpensive
• Needed for: running and scheduling PHP script that both queries the database and sends the info to Twilio
• Ask Reclaim for:
  – PostgreSQL-enabled server
  – Whitelisted database server IP
Pulling the Data: SierraDNA

• We need to get the data, so we need to be able to talk to the database server
• Needed for: generating patron/item data
Sending Texts: Twilio

• $1/month/number
• $0.0075/text message sent/received
• Excellent documentation and examples
• Lots of different API options
• Needed for: sending texts
Useful Development Tools

Text editor
- Sublime Text (bugs you for $70)
- Notepad++ (free)
- Brackets.io (free)

Terminal emulator
- PuTTY (free)
- Terminal (Mac)

FTP client
- FileZilla (free)

SQL query building
- pgAdmin (free)
But I’m Still Not a Developer …

Documentation
- PHP.net
- postgresql.org
- techdocs.iii.com/sierradna/
- twilio.com/api

Forums
- stackoverflow.com
- Reddit
  - /r/phphelp
  - /r/learnsql

Tutorials & Classes
- codeacademy.com
- W3schools.com

Peers
- Listservs, Twitter, email, phone

Repositories
- GitHub

Tools
- regex101.com
Workflow Issues

• No consistent data in TELEPHONE/TELEPHONE2 fields in patron record
• Weekly patron load overwrites most fields
• No way to self-opt-in via WebPAC Library Account
Developing the Local Workflow

1. Patron signs up via web form
2. Notification sent to group who manually update the patron records
3. Patron record manually updated by library staff
4. Confirmation text message sent to patron via custom back-end HTML+PHP web form that connects with Twilio service
Patron Record Update

Patron record manually updated
- PCODE2 = y
- NOTE field inserted with mobile number, formatted as +17175551234

Modify patron load profile
- @ov_protect V104 (NOTE), F45 (PCODE2)
Code:
- Github (https://github.com/rmiessle/sierra-sms)
- Clearinghouse (eventually)

Comments are removed from the code for this presentation
$variables and Other Necessary Stuff

```
date_default_timezone_set('America/New_York');
$messageCount = 0;
$logFile = 'smslog.txt';
$fromNumber = '###-###-####';
$messageBody = "XXX LIBRARY NOTICE: Your item is due within 15 minutes. Please return it to the circulation desk. Barcode: ";
```

• Sets the timezone (not really a variable)

• $messageCount – notices sent starts at 0

• $logFile - what the log file is called (for our `writeLog()` function)

• $fromNumber - our Twilio number

• $messageBody – the message we send
This variable sets up your credentials to connect to your SQL database server

- **host** (database URL)
- **port** (usually 1032)
- **dbname** (usually iii)
- **user** (Sierra user with Sierra SQL Access application)
- **password** (anyone who has access to this file can see it)
- **sslmode** (require for security)
Writing to a Log File

```php
if (pg_num_rows($result)==0) {
    writeLog();
}
```

```php
function writeLog() {
    global $logFile, $conn, $messageCount;
    file_put_contents($logFile, date('m-d-Y H:i:s')." ".
messageCount." notices sent".PHP_EOL, FILE_APPEND | LOCK_EX);
    pg_close($conn);
    exit;
}
```

If no results are found after running the query, run the `writeLog()` function

– This just makes a note in the log file that 0 messages were sent
SQL Query for Hourly Items

```
$result = pg_query($conn,
"SELECT
  varfield.field_content as mobile,
  item_record_property.barcode as barcode
FROM
  sierra_view.varfield,
  sierra_view.item_record_property,
  sierra_view.checkout,
  sierra_view.patron_record
WHERE
  varfield.record_id = patron_record.record_id AND
  checkout.item_record_id = item_record_property.item_record_id AND
  patron_record.record_id = checkout.patron_record_id AND
""
```

- Pulls the note from the patron record (**mobile**) and the item barcode (**barcode**)
- Matches the note field and checkout record to the patron record, and the checkout record to the item record
• Additional conditions:
  • The patron record must have a **NOTE** field (x)
  • **PCODE2** must be y
  • The **NOTE** field must match our phone number formatting (+17175551234)
  • The due timestamp must be between now and 15 minutes from now (900 seconds)
SQL Query for Items Due Next Day

The two main differences are the due date we are looking for (current_date + interval ‘1 day’), and we are sending the patron the number of items due (COUNT)
Run Query, Send Results to Twilio

- Creates an array `$people` containing each row returned by the SQL query with columns `mobile` and `barcode` (or `count` for items due tomorrow)
- Loads the Twilio helper library (`Twilio.php`) to send the messages
- For each row of the array, sends a text message that contains the message body and barcode for the item due (hourly items), item count for items due tomorrow
Send the Results to Twilio (Continued)

- Redacts the message body in the Twilio logs
- Adds 1 to the message count
- Repeat until all rows are accounted for
- When done, runs the `writeLog()` function to say how many notifications were sent
• Less than 60 lines of code (without comments)
• NOTHING works right the first time
• Test as much as you can before going live
• Capture error messages and Google them
• Ask for help!
ChRONo Trigger

• Cron job – executes PHP script on a schedule
• Runs every 15 minutes for hourly items, and once a day for items due the next day
• Configured through Reclaim Hosting cPanel interface

<table>
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<th>Minute</th>
<th>Hour</th>
<th>Day</th>
<th>Month</th>
<th>Weekday</th>
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<td>20</td>
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<td>*</td>
<td>*</td>
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<td></td>
<td>*/15</td>
<td>0</td>
<td>*</td>
<td>*</td>
<td>*</td>
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<td></td>
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<td>*</td>
<td>*</td>
<td>*</td>
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<tr>
<td></td>
<td>1,15,30,45</td>
<td>4</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
</tbody>
</table>
Where’s the Data Going?
*Ding*

**Message:**

MUSSELMAN LIBRARY NOTICE: Your item is due within 15 minutes. Please return it to the circulation desk. Barcode: 332680006018334
Extra Stuff

• Added link to web form in the WebPAC
• Added auto-reply options (Twilio API)
• Confirmation texts after signup
Success?

• 80 patrons signed up since launch
• 430+ notifications sent
• Signup drive during September
• Marketing committee push
• iPad at Circulation Desk with shortcut to the form
Will this Work for Your Library?

• Budget for Twilio service (and server space)
• Knowledge of (or willingness to learn) PHP, SQL, web hosting
• No institutional issues with using 3rd party providers
• Staff to manage a manual workflow
• Sense that patrons want this service
What’s Next?

• Can we use the Sierra Patron and Twilio APIs in any way to streamline signup?
• New queries – what do patrons and staff want?
• Rewrite our text-a-call-number script to use Twilio
• Eliminate writeLog()
• Learn more developer stuff!
Recommended Reading

“What is Code?” by Paul Ford
Links to Resources

reclaimhosting.com
twilio.com
  – twilio.com/docs/php/install - PHP Helper Library
techdocs.iii.com/sierradna/
“Automating Custom Patron Notices and Messages Using SQL” (IUG 2015)
  – http://innovativeusers.org/conferences/search-presentations.html
Thanks!

rmiessle@gettysburg.edu
https://github.com/rmiessle
@iconodule

https://xkcd.com/519/