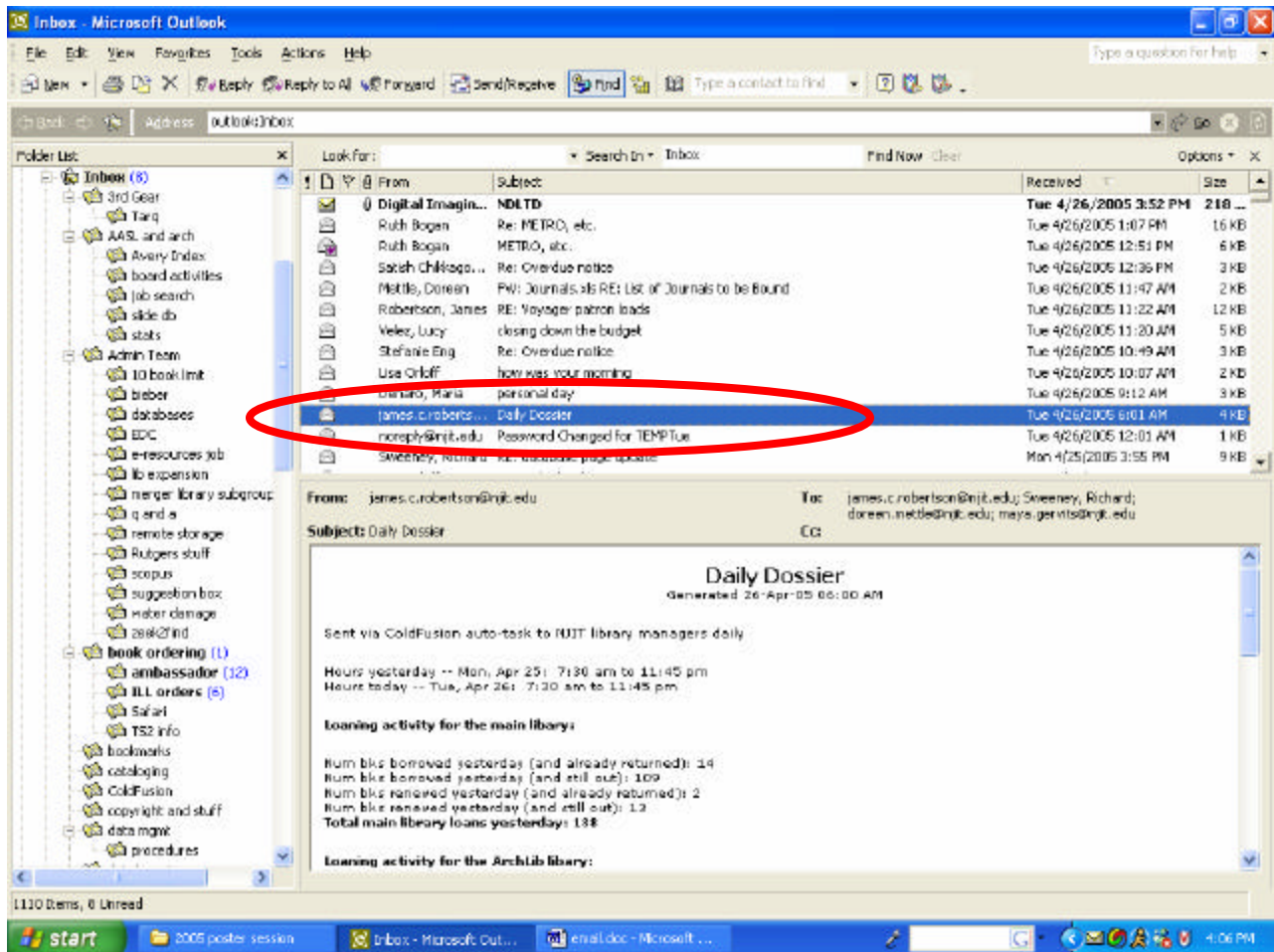


Daily Dossier: pushing daily management information via email

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Abstract:

This poster session will show examples of New Jersey Institute of Technology library's **Daily Dossier** - an email that is automatically sent every morning to library managers detailing the previous day's Voyager statistics. This service is "pushed" to the managers' destinations-of-choice: their email accounts. These daily emails help managers recognize trends, anomalies, and situations that need attention in near-real time, as opposed to traditional day-late-dollar-short quarterly or annual reports. The poster will show examples of the Daily Dossier email and reveal the SQL and ColdFusion code with which it was done. It will also discuss the advantages and disadvantages of such an approach.



Daily Dossier

Generated 22-Apr-05 06:00 AM

Sent via ColdFusion auto-task to NJIT library managers daily

Hours yesterday -- Thu, Apr 21: 7:30 am to 11:45 pm

Hours today -- Fri, Apr 22: 7:30 am to 7:45 pm

Loaning activity for the main library:

Num bks borrowed yesterday (and already returned): 10

Num bks borrowed yesterday (and still out): 117

Num bks renewed yesterday (and already returned): 0

Num bks renewed yesterday (and still out): 16

Total main library loans yesterday: 143

Loaning activity for the ArchLib library:

Num bks borrowed yesterday (and already returned): 5

Num bks borrowed yesterday (and still out): 3

Num bks renewed yesterday (and already returned): 0

Num bks renewed yesterday (and still out): 16

Total ArchLib loans yesterday: 24

» See [circ day-by-day details](#). Note: Loans do not include non-Voyager activity (e.g., use-in-library loans, study rooms, etc.).

Returning activity:

Num bks discharged at main lib yesterday: 121

Num bks discharged at ArchLib yesterday: 24

ILL activity:

Num ILL requests for **books** submitted via web yesterday: 3

Num ILL requests for **journals** submitted via web yesterday: 1

Total num ILL requests submitted via web yesterday: 5

» See list of [most recent ILL book requests](#). Note: Above stats are for borrowing only; not loan activity. Also does not include paper forms.

Cataloging activity:

Num bibs created yesterday: 0

Patron database activity:

Num patron accounts created yesterday by system load: 4

Total num patron accounts created yesterday: 4

» See list of [most recently created patrons by SYSTEM load](#). Note: List needs to be checked weekly to "weed" obsolete account due to SSN updating.

.....
This email was auto-generated by a ColdFusion script set to run daily. Created by Jim Robertson in Sept 2004.

Hot links in email to more detailed web-based reports (see below for examples).

http://www... by day.cfm - Microsoft Internet Explorer

File Edit

Back

Address

Google

Report on circulation a...
... updated from the Voyager

Note: only includes items charged through Voyager system, does not include items...

Look at FY: 2004-2005

Change library: Main library

Re-calculate

Report for: Circulation Department

Report generated: Tue, Apr 19, 2005 at 3:49 PM

Month	Bks borrowed (and since returned)	Bks borrowed (and still outstanding)	Bks renewed (and since returned)	Bks renewed (and still outstanding)	TOTALS	Details
Thu Jul 1, 2004	0	0	0	0	78	Get details
Fri Jul 2, 2004	0	0	0	0	0	Get details
Sat Jul 3, 2004	0	0	0	0	0	Get details
Sun Jul 4, 2004	0	0	0	0	0	Get details
Mon Jul 5, 2004	0	0	0	0	0	Get details
Tue Jul 6, 2004	79	1	19	0	99	Get details
Wed Jul 7, 2004	110	0	0	1	110	Get details
Thu Jul 8, 2004	88	0	6	0	94	Get details
Fri Jul 9, 2004	0	0	0	0	0	Get details
Sat Jul 10, 2004	0	0	0	0	0	Get details
Sun Jul 11, 2004	0	0	0	0	0	Get details
Mon Jul 12, 2004	73	0	3	0	76	Get details
Tue Jul 13, 2004	90	0	6	0	96	Get details
Wed Jul 14, 2004	94	0	13	0	107	Get details
Thu Jul 15, 2004	69	0	1	2	72	Get details
Fri Jul 16, 2004	0	0	0	0	0	Get details
Sat Jul 17, 2004	0	0	0	0	0	Get details

start

Windows...

Internet E...

Job...

Microsoft...

Cold Fusion S...

Local intranet

3:50 PM

Defaults to current FY and main library, but allows user to change variables.

Collects counts from CIRC_TRANSACTIONS and CIRC_TRANS_ARCHIVES tables. Totals, as well.

Get details "drills down" to another report (see below).

Can "scroll" through day-by-day.

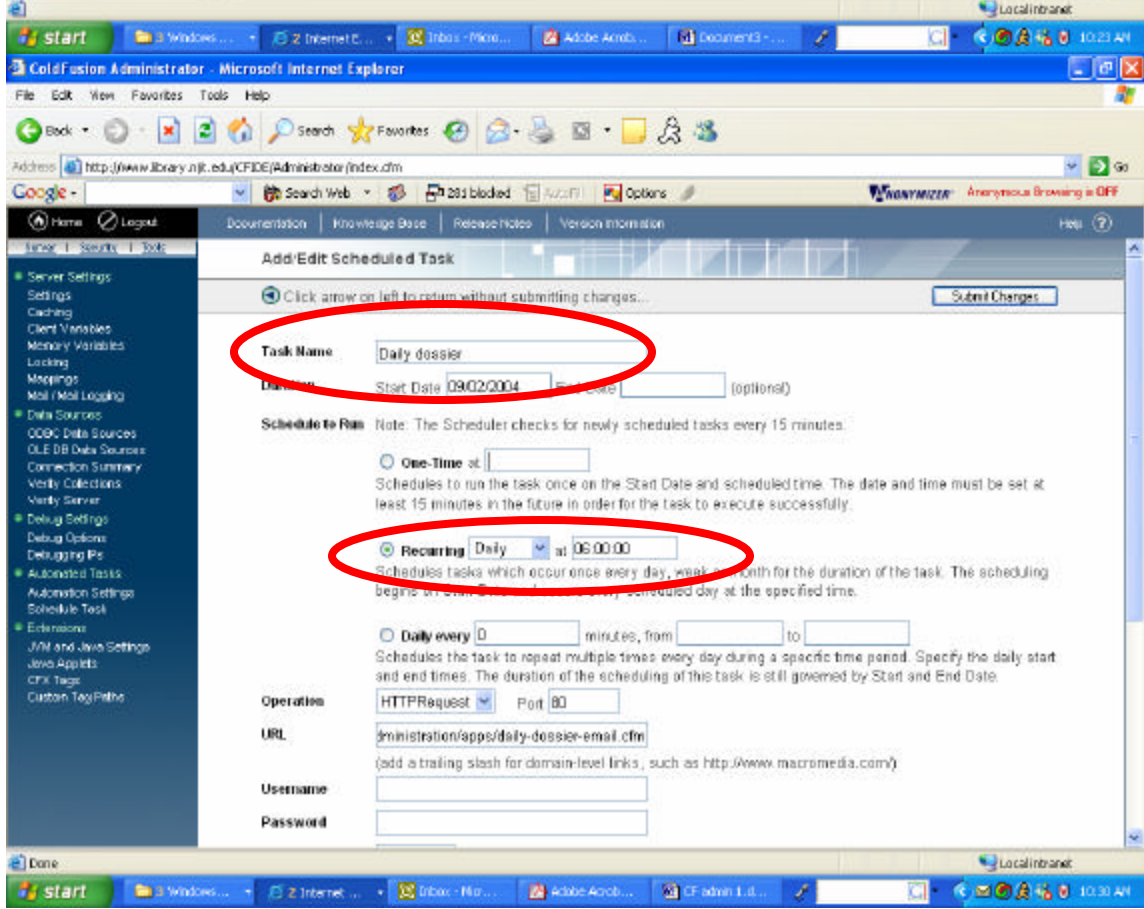
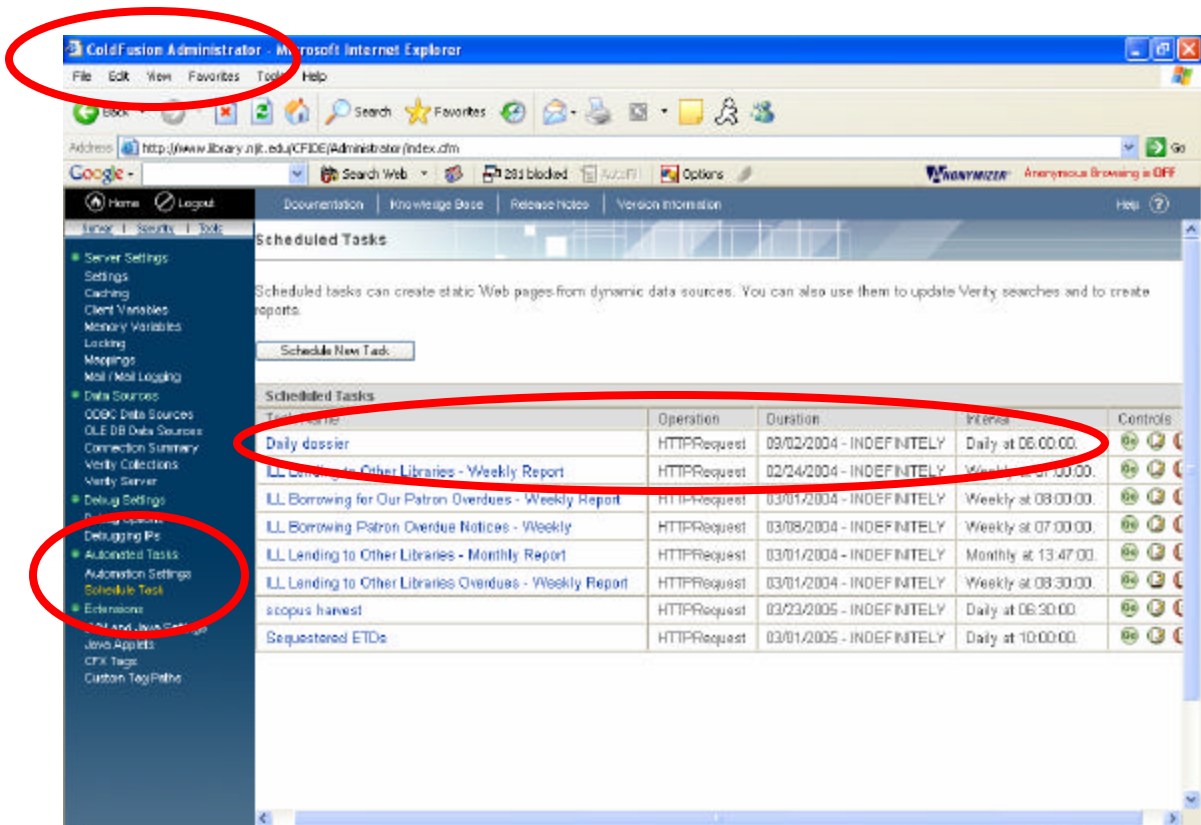
Details show all circulations for that day.

ISBN is link to record within Voyager web interface.

Charge date	Patron info	Current due date	Renewal count	Item info
11-19-Apr-05 10:02 AM	[Redacted]	11-May-05	0	Experimentation in mathematics : computational paths to discovery / (1566811365)
219-Apr-05, 10:02 AM	[Redacted]	May-05	0	Nonequilibrium statistical mechanics / (0195140184 (cloth))
319-Apr-05, 2:39 PM	[Redacted]	May-05	0	Vertical density representation and its applications / (9812386939)
419-Apr-05, 2:40 PM	[Redacted]	11-May-05	0	Introduction to transition-metal chemistry: ligand-field theory ()
519-Apr-05, 2:40 PM	[Redacted]	May-05	0	Transitional elements ()
619-Apr-05, 2:40 PM	[Redacted]	May-05	0	Oxidation of metals. ()
719-Apr-05, 2:40 PM	[Redacted]	v-05	0	Advanced inorganic chemistry

Advantages of the **Daily Dossier**:

- Daily Dossier is **"pushed"** to manager's email box every morning.
- It gives **near real-time** feedback and stats on library operations.
- It is no substitute for monthly, quarterly, and yearly reports, but ...
- Trends, anomalies, situations can be recognized **as they are happening**, not months later.
- **Accountability** of staff.
- Shows the **"current time and temperature"** of your library's activities.
- Daily reports linked to more **in-depth** web-based reports.



This is the daily-dossier-email.cfm file that is run each morning at 6:00 am by the ColdFusion task scheduler.
 Not all code present. Just illustrative examples.

```
<cfset dbname = "XXXXdb">
```

Set dbname variable for code portability

```
<cfset today_date = #DateFormat(Now())#>
<cfset yesterday_date = #DateFormat(DateAdd('D', -1, today_date))#>
<cfset today_date = #DateFormat(DateAdd('D', 1, yesterday_date))#>
```

Calculate today's date and yesterday's date

```
<!-- ----- -->
```

```
<cfquery name="book_returns_main" datasource="voyager">
SELECT Count(CIRC_TRANS_ARCHIVE.CIRC_TRANSACTION_ID) AS discharge_count
FROM #dbname#.CIRC_TRANS_ARCHIVE
WHERE DISCHARGE_LOCATION = '37' AND
DISCHARGE_DATE Between '#yesterday_date#' And '#today_date#'
```

Get number of returned books for each location (two locations at NJIT: 37 and 38)

```
</cfquery>
<cfset var_discharge_count_main = book_returns_main.discharge_count>
<!-- ----- -->
<cfquery name="book_returns_archlib" datasource="voyager">
```

Assign the result from each query to a "page-level" variable (instead of one attached to that specific query result). You'll see why later ...

```
SELECT Count(CIRC_TRANS_ARCHIVE.CIRC_TRANSACTION_ID) AS discharge_count
FROM #dbname#.CIRC_TRANS_ARCHIVE
WHERE DISCHARGE_LOCATION = '38' AND
DISCHARGE_DATE Between '#yesterday_date#' And '#today_date#'
```

SQL "between" command with two dates with unspecified hours/minutes means: between midnight starting day 1 and ending the moment **before** midnight of day 2 (a 24 hour period)

```
</cfquery>
<cfset var_discharge_count_archlib = book_returns_archlib.discharge_count>
<!-- ----- -->
<cfquery datasource="voyager" name="get_circs_returned_mainlib">
SELECT Count(CIRC_TRANS_ARCHIVE.CIRC_TRANSACTION_ID) AS circ_count_1
FROM #dbname#.CIRC_TRANS_ARCHIVE
WHERE CIRC_TRANS_ARCHIVE.CHARGE_LOCATION = '37' AND
CIRC_TRANS_ARCHIVE.CHARGE_DATE Between '#yesterday_date#' And '#today_date#'
```

- For each location, must get:
- books borrowed and returned (CIRC_TRANS_ARCHIVE table)
 - books borrowed and not yet returned (CIRC_TRANSACTIONS)
 - books renewed and returned (RENEW_TRANS_ARCHIVE)
 - and books renewed, but not yet returned (RENEW_TRANSACTION S)

```
</cfquery>
<cfset var_circs_returned_mainlib = get_circs_returned_mainlib.circ_count_1>
<!-- ----- -->
<cfquery datasource="voyager" name="get_circs_notreturned_mainlib">
SELECT Count(CIRC_TRANSACTIONS.CIRC_TRANSACTION_ID) AS circ_count_2
FROM #dbname#.CIRC_TRANSACTIONS
WHERE CIRC_TRANSACTIONS.CHARGE_DATE Between '#yesterday_date#' And '#today_date#'
CIRC_TRANSACTIONS.CHARGE_LOCATION = '37'
```

```
</cfquery>
<cfset var_circs_notreturned_mainlib = get_circs_notreturned_mainlib.circ_count_2>
<!-- ----- -->
<cfquery datasource="voyager" name="get_renews_returned_mainlib">
```

```
SELECT Count(RENEW_TRANS_ARCHIVE .CIRC_TRANSACTION_ID) AS circ_count_3
FROM #dbname#.RENEW_TRANS_ARCHIVE
WHERE RENEW_TRANS_ARCHIVE.RENEW_DATE Between '#yesterday_date#' And '#today_date#' AND
RENEW_TRANS_ARCHIVE.RENEW_LOCATION = '37'
```

```
</cfquery>
```

```
<cfset var_renews_returned_mainlib = get_renews_returned_mainlib.circ_count_3>
```

```
<!-- ----->
```

```
<cfquery datasource="voyager" name="get_renews_notreturned_mainlib">
```

```
SELECT Count(RENEW_TRANSACTIONS.CIRC_TRANSACTION_ID) AS circ_count_4
FROM #dbname#.RENEW_TRANSACTIONS
WHERE RENEW_TRANSACTIONS.RENEW_DATE Between '#yesterday_date#' And '#today_date#' AND
RENEW_TRANSACTIONS.RENEW_LOCATION = '37'
```

```
</cfquery>
```

```
<cfset var_renews_notreturned_mainlib = get_renews_notreturned_mainlib.circ_count_4>
```

```
<!-- ----->
```

```
<cfset var_circs_day_total_mainlib = var_circs_returned_mainlib + var_circs_notreturned_mainlib +
var_renews_returned_mainlib + var_renews_notreturned_mainlib>
```

Total all 4 counts for overall count for the location. Assign as page-level variable.

```
<!-- ----->
<!-- ---- email output ----->
<!-- ----->
```

```
<cfmail query="book_returns_main" to="james.c.robertson@njit.edu"
subject="Daily Dossier" type="HTML">
```

Start cfmail command. Cfmail must contain a reference to at least one query result from above. To avoid limiting the email to variable only available within that query, that's why we assigned all other results to page-level variables.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
```

```
<html>
<head><title>Daily Dossier</title></head>
```

```
<body bgcolor="FFFFFF">
```

Cfmail can be html format.

```
<cfoutput>
```

```
<font face="verdana">
<p align="center"><b>Daily Dossier</b><br></font>
<font face="verdana" size="-2">Generated #DateFormat(Now())# #TimeFormat(Now())#</p>
```

Refer to page-level variables from above to show results on the page web.

```
<p>Sent via ColdFusion auto-task to NJIT library managers daily</p>
```

```
<p><b>Loaning activity for the main library:</b></p>
```

```
<p>Num bks borrowed yesterday (and already returned): #var_circs_returned_mainlib#<br>
Num bks borrowed yesterday (and still out): #var_circs_notreturned_mainlib#<br>
Num bks renewed yesterday (and already returned): #var_renews_returned_mainlib#<br>
Num bks renewed yesterday (and still out): #var_renews_notreturned_mainlib#<br>
<b>Total main library loans yesterday: <b>#var_circs_day_total_mainlib#</b></b></p>
```

Create links to more detailed reports.

```
<p><font face="verdana" size="-2" color="red"><b>></b></font> See <a
HREF="http://www.library.njit.edu/staff/voyager/circulation-day-by-day.cfm">circ day-by-day details</a>. Note:
Loans do not include non-Voyager activity (e.g., use-in-library loans, study rooms, etc.).</p>
```

```
<p align="center">. . . . .</p>
```


<p align="center">This email was auto-generated by a ColdFusion script set to run daily. Created by Jim
Robertson in Sept 2004.</p>

</cfoutput>

</cfmail>

Tech specs:

- Voyager 2001.1 on Solaris with Oracle 9i
- ColdFusion 5.0 on WinNT server with IIS

(Running daily for 8 months without a single day of error or problem)

For more information, contact:

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