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Starting Over: Coding to Work with Alma after Voyager

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STARTING OVER:

CODING TO WORK WITH ALMA AFTER VOYAGER

Kathryn Lybarger

University of Kentucky Libraries

@zemkat

ELUNA 2016

Thursday May 5, 2016

#ELUNA2016

MIGRATION

- January 20, 2016 – University of Kentucky Libraries migrated from Voyager to Alma / Primo
- (January 6, 2016 – I proposed this talk)
- I anticipated differences due to:
 - Different user interface: Web vs. applications
 - Different database access: Analytics / APIs vs. SQL

MACROS (AUTOHOTKEY)

- Hard to type symbols

- `::*(c)::@` (copyright)

- `::*;!alpha!::α` (Greek letters)



- Lengthy common phrases

- `::brn::Includes bibliographical references (pages) and index.`

VOYAGER / ALMA: MACROS – CONSISTENT HOTKEYS

- Using consistent hotkeys between programs
- Ctrl-D:
 - Connexion: Subfield delimiter
 - Voyager: Diacritic mode
 - Alma: Delete record

```
^d::  
IfWinActive, Voyager  
Cataloging  
{  
    Send {F9}  
} else {  
    Send ^d  
}  
Return
```

ALMA: BOOKMARKS / SHORTCUTS

- "Can you make me a button that goes straight to the Metadata Editor?"
- HotKeys already exist for many pages, like:
 - F3 – Advanced Search
 - Alt-P – Pick from Shelf interface
- For others, browser bookmarks seem to work

ACQUISITIONS Purchase Order Lines Search for PO Line Purchase Requests Create Purchase Request Manage Purchase Requests Post-Receiving Processing Receiving Department Items Scan In Items Acquisitions Infrastructure Vendors Funds and Ledgers Licenses	RESOURCE MANAGEMENT Search and Sets Repository Search Manage Sets Manage Exports Manage Collections Cataloging Search External Resources Browse Bibliographic Headings Browse Shelf Listing Open Metadata Editor Authority Control Task List Create Inventory Add Local Electronic Collection Add Local Portfolio Add Physical Item Manage Inventory Community Zone Updates Task List Manage Electronic Resource Activation Shelf Report Import Import Upload single record from file Monitor and View Imports Resolve Import Issues Advanced Tools Overlap Analysis Duplicate Title Analysis Resource Configuration Configuration Menu	FULFILLMENT Checkout/Checkin Manage Patron Services Return Items Resource Requests Scan In Items Manage In Process Items Advanced Tools Fulfillment Configuration Utility Create Fulfillment Sets Offline Circulation	ADMINISTRATION General Configuration Configuration Menu Analytics Design Analytics Configuration Menu Subscribe to Analytics Manage Jobs Run a Job Monitor Jobs
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VOYAGER: MACROS - BIBCAPTURE

- Capturing information from Cataloging module
 - Bib, Mfhd, Item numbers appear at the top of the top of each records
 - There is no quick way to copy this number
 - A macro can pull this info into your copy-paste buffer



ALMA: NO BIBCAPTURE NEEDED

- Alma is a web application
- Metadata Editor displays all MARC fields as part of the record including 001 and fixed fields
- You can just copy and paste the field yourself

File	Edit	Tools	H ⁺
You have 3 warning(s) in your record			
Working on -A study of chemicall (9925195106802636) , Created			
LDR		01275ctm#a2200337Ka#4500	
001		9925195106802636	
005		20160429163223.0	
008		070516s2004#####xx#a#####b#####000#0	
035		‡a (OCoLC)ocn145564377	
035		‡a (OCoLC)145564377	
035		‡a (KyU)2519510-ukdb	
040		‡a KUK ‡c KUK	
049		‡a KUKK	
099	9	‡a Theses ‡a 2004	

ALMA: WHAT'S THAT H?


File	Edit	Tools	H ⁺
You have 3 warning(s) in your record			
Working on -A study of chemicall (9925195106802636) , Created			
LDR		01275ctm#a2200337Ka#4500	
001		9925195106802636	
005		20160429163223.0	
008		070516s2004#####xx#a#####b#####000#0	
035		‡a (OCoLC)ocn145564377	
035		‡a (OCoLC)145564377	
035		‡a (KyU)2519510-ukdb	
040		‡a KUK ‡c KUK	
049		‡a KUKK	
099	9	‡a Theses ‡a 2004	

ALMA: WOW, THAT MMS ID IS LONG

- Acquisitions used to hand-write the Voyager bib ID onto a routing slip
 - This was onerous with the MMS ID, so they began pasting it
- Cataloging used to type that number from the slip
 - This became error-prone with the MMS ID, so they started using a barcode font (Code 39)

Temp Location: _____

909 Needed: _____

BIB: 
* 9 9 2 5 1 9 5 1 0 6 8 0 2 6 3 6 *

OCLC#: _____

Date: _____ Initials: _____

Message: _____









Order #: _____

Price: _____

BARCODE SCANNER CONFIGURATION

- We had our barcode scanners configured with a CR suffix
- Under Voyager:
 - Speedy barcode search
- Under Alma:
 - Saved item records before we could finish editing
- Reconfigured to remove suffix

Standard Suffix Characters

 3 1 1 6 6 1 3	* Enable CR Suffix – The scanner transmits a carriage return after each bar code.
 3 1 1 6 6 0 3	Disable CR Suffix.
 3 1 1 6 6 1 2	* Enable LF Suffix – The scanner transmits a line feed after each bar code. <i>Disabled when keyboard wedge defaults are loaded.</i>
 3 1 1 6 6 0 2	Disable LF Suffix.
 3 1 1 6 6 1 0	Enable Tab Suffix – The scanner will transmit a TAB (ASCII 09H) after each bar code.
 3 1 1 6 6 0 0	* Disable Tab Suffix
 3 1 1 6 6 1 4	Enable ETX Suffix – The scanner will transmit End of TeXt (ASCII 03H) after the bar code date.
 3 1 1 6 6 0 4	* Disable ETX Suffix

ALMA / PRIMO: BROWSER EXTENSIONS

- Install in your browser to change appearance / behavior of web sites
- Download programs:
 - Add-ons for Firefox
 - Extensions in Chrome Web Store
- Install code:
 - Greasemonkey (Firefox)
 - Tampermonkey (Chrome)



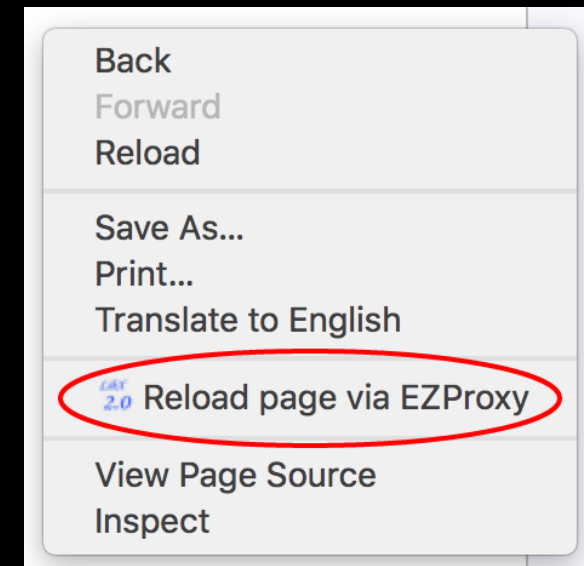
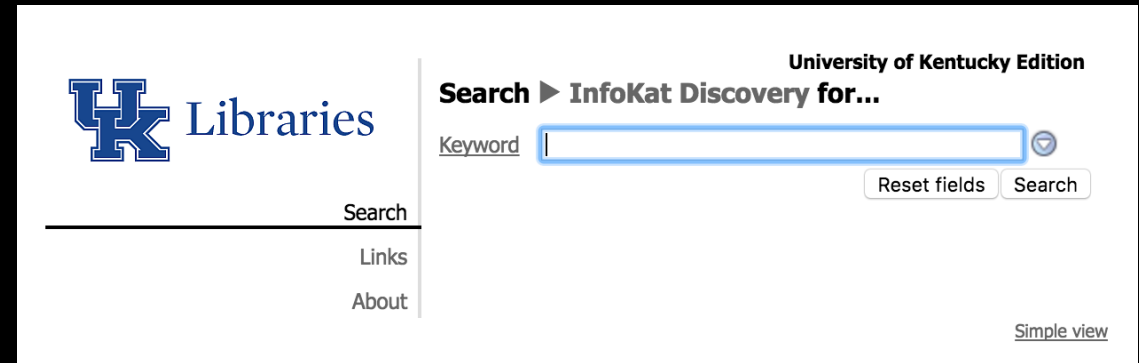
PRIMO: SHOWPNX

- Created by Justin Kelly at Swinburne University of Technology
- Adds a small button to your web browser
- When viewing a record in Primo, click to view the PNX record
- Works by adding **&showPnx=true** to the URL

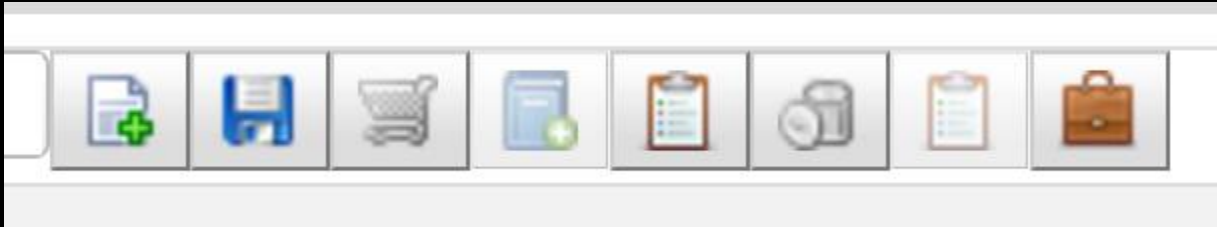
The image shows two screenshots. The top screenshot is the 'showPnx for ExLibris Primo' extension page, which includes a puzzle-piece icon, the text 'showPnx for ExLibris Primo', 'offered by justin@kelly.org.au', a 2-star rating, and '320 users'. Below this are tabs for 'OVERVIEW', 'REVIEWS', and 'RELATED'. The bottom screenshot is a Primo record page for the book 'Water' by Graeme O'Neill. A red arrow points to a small 'PNX' button in the top right corner of the browser window. A text box with a red border contains the instruction: 'In the full display for a Primo record click the PNX button'.

PRIMO: LIBX

- Developed at Virginia Tech, funded by an IMLS grant
 - Available from libx.org
 - Free/open source
 - Create/distribute from their site
- Adds a button to your browser providing quick access to ILS search
- Updated our Voyager edition to work with Primo
 - Documented in blog post



ALMA / PRIMO BROWSER EXTENSION: ALMA JOY



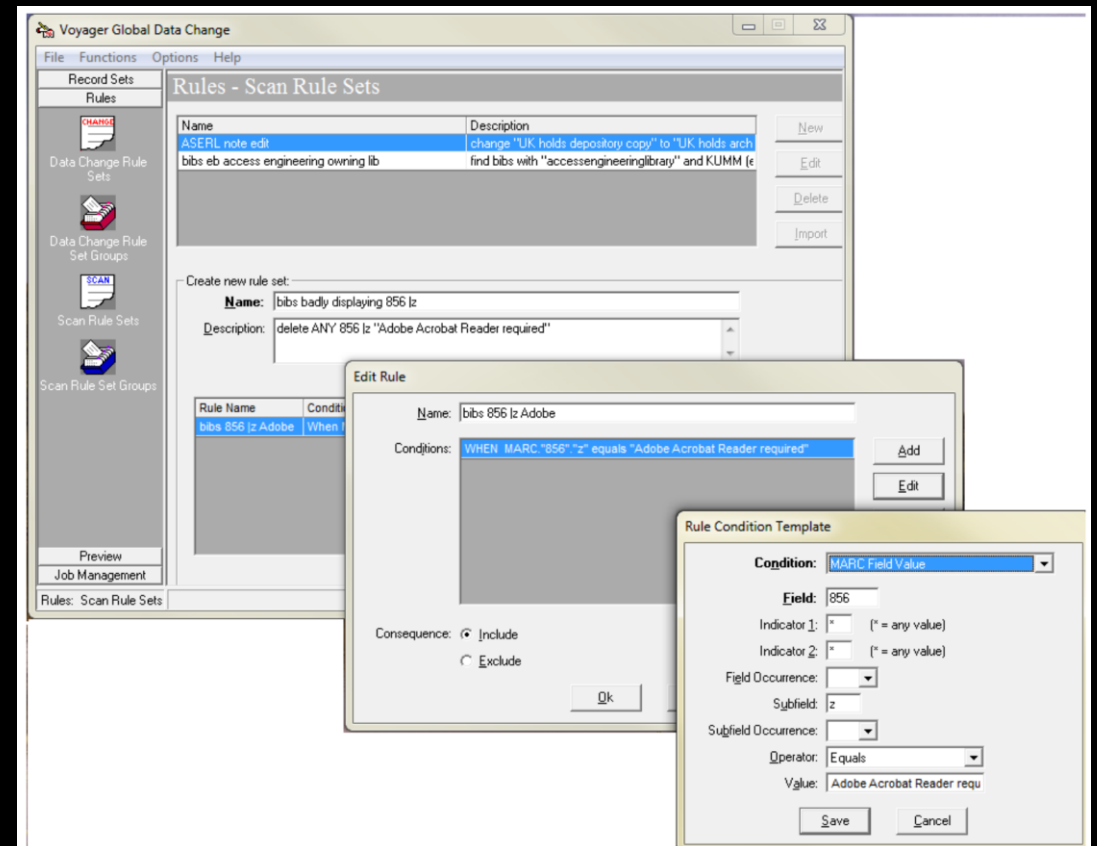
I can't remember what these buttons do



So I changed the icons

VOYAGER: BATCH EDITING

- Outside of Voyager:
 - MarcEdit
 - MARC libraries (pymarc, etc.)
 - Normac
- Within Voyager:
 - Global Data Change
 - Pick and Scan



ALMA: NORMALIZATION RULES

- Make changes to MARC records
- Can be applied:
 - To individual records
 - To sets of records
 - Conditionally based on record content
 - Upon save
 - Upon import
 - After preview

Normalization rules preview Glass' office gyneco (9941041679602636)

Follow up as well as referral for specialty treatment and counseling
 Provided by publisher.

650	0	‡a Gynecology.
650	0	‡a Ambulatory medical care.
650	0	‡a Reproductive system, Female.
700	1	‡a Linares, Silvia T., ‡e author.
700	1	‡a Antoniewicz, Leah, ‡e author.
700	1	‡a Gaertner, Rebecca S., ‡e editor.
700	1	‡a Fischer, Ashley, ‡e editor.
700	1	‡a Orzechowski, David, ‡e production manager.
700	1	‡a McLaughlin, Holly, ‡e designer.
		‡i Print version: ‡a Curtis, Michèle G. ‡t Glass' office gynecology. ‡b
776	0	8 Seventh edition. ‡d Philadelphia, Pennsylvania : Wolters Kluwer, ©2014
		‡h xv, 639 pages ‡z 9781608318209
		‡u http://ezproxy.uky.edu/login?
856	4	0 url=http://site.ebrary.com/lib/kentucky/docDetail.action? docID=10906714 ‡3 ebrary
994		‡a C0 ‡b KUM
710	2	‡a ebrary, Inc

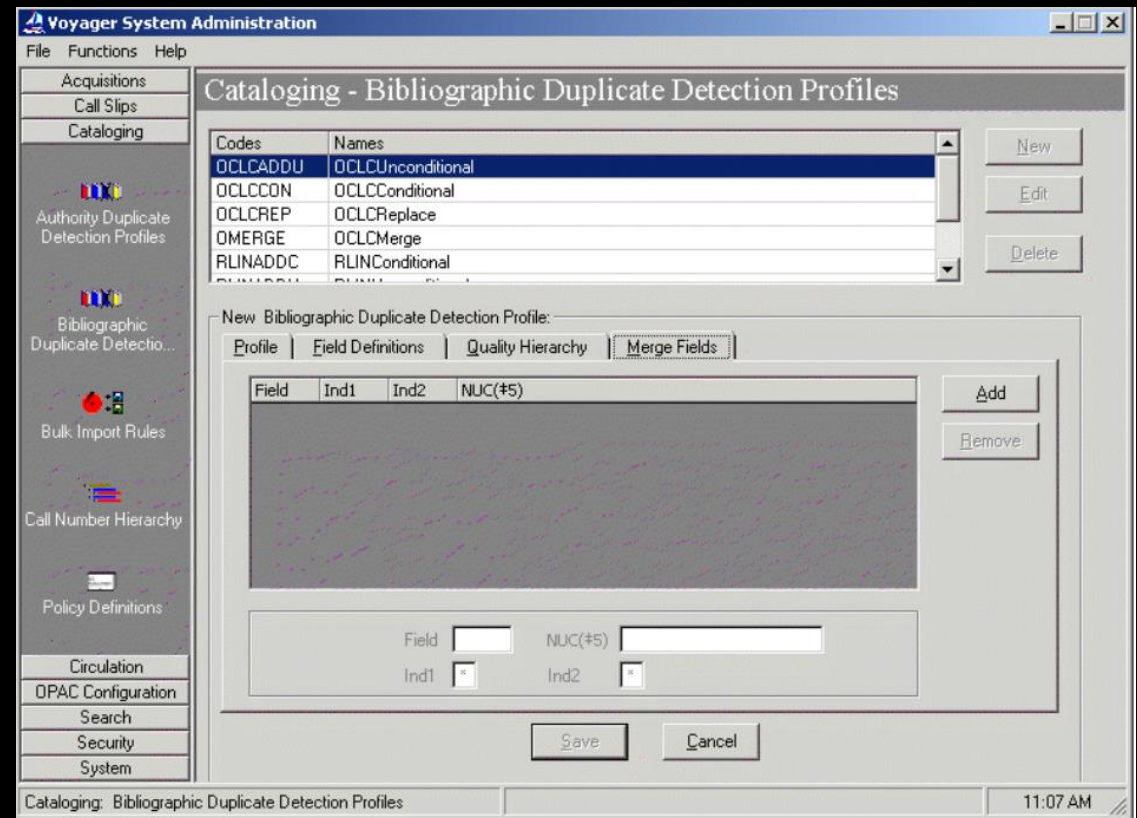
[Back to normalization rules](#)
[Apply Changes](#)

NORMALIZATION RULE EXAMPLES

- addField "710.{2,-}.a.ClinicalKey (Online service)"
- removeField "856" if (not exists "856.u.*clinicalkey.com/*")
- addSubfield "856.3.ClinicalKey" if (not exists "856.3")
- removeSubfield "856.z"
- prefix "856.u" with "http://ezproxy.uky.edu/login?url=" if (not exists "856.u.*ezproxy*")

VOYAGER: MERGE FIELDS

- All fields from incoming record kept
- Specify which fields from original record should also be kept based on:
 - Tag
 - Indicators
 - Institution (#5)
- Some flexibility with Quality Hierarchy



ALMA: MERGE RULES

- Merge two records based on:
 - Tag (and tag patterns like 9XX)
 - Indicator
 - Which fields exist already
 - Contents of fields
- Can be used for:
 - Importing / overlaying
 - Merging two existing records
- (You may need multiple rules)

```
Merge-External.dslr
rule "Merge-External"
# This rule is for use importing records through External Resources
# Do not use it for Import Profiles or OCLC Connexion -- it will not work as you expect
# In this context, the Primary record is the external record (OCLC), and the Secondary record is the internal record in Alma

when
  merge
then
  replace MARC:"001"
  add MARC:"024"
  add MARC:"035"
  add MARC:"088"
  add MARC:"09"X
  add MARC:"505"
  add MARC:"561"
  add MARC:"583"
  add MARC:"59"X
  add MARC:"6"XX
  add MARC:"8"XX
```

Save

MERGE RULE EXAMPLES

- add MARC."590"
- add MARC."590" if does not exists

- remove MARC."938"
- remove MARC."9"XX excluding "990,991"

- replace MARC."245"
- replace MARC."995" when MARC."995"."a" does not contain "history" excluding MARC."995"("0","1")

Julene-delete 65* 2nd ind 7 if no |2

```
rule "Julene-delete 65* 2nd ind 7 if no |2"  
when  
(TRUE)  
then  
# move the good ones to safety  
changeField "655" to "SFT" if(exists "655.{*,0}")  
changeField "655" to "SFT" if(exists "655.{*,2}")  
changeField "655" to "SFT" if(exists "655.{*,7}.2.lc*")  
changeField "655" to "SFT" if(exists "655.{*,7}.2.rb*")
```

COMMENTS

#

Merge-External.dslr

```
rule "Merge-External"  
# This rule is for use importing records through External Resources  
# Do not use it for Import Profiles or OCLC Connexion -- it will not work as you expect  
# In this context, the Primary record is the external record (OCLC), and the Secondary record is the internal record in Alma
```

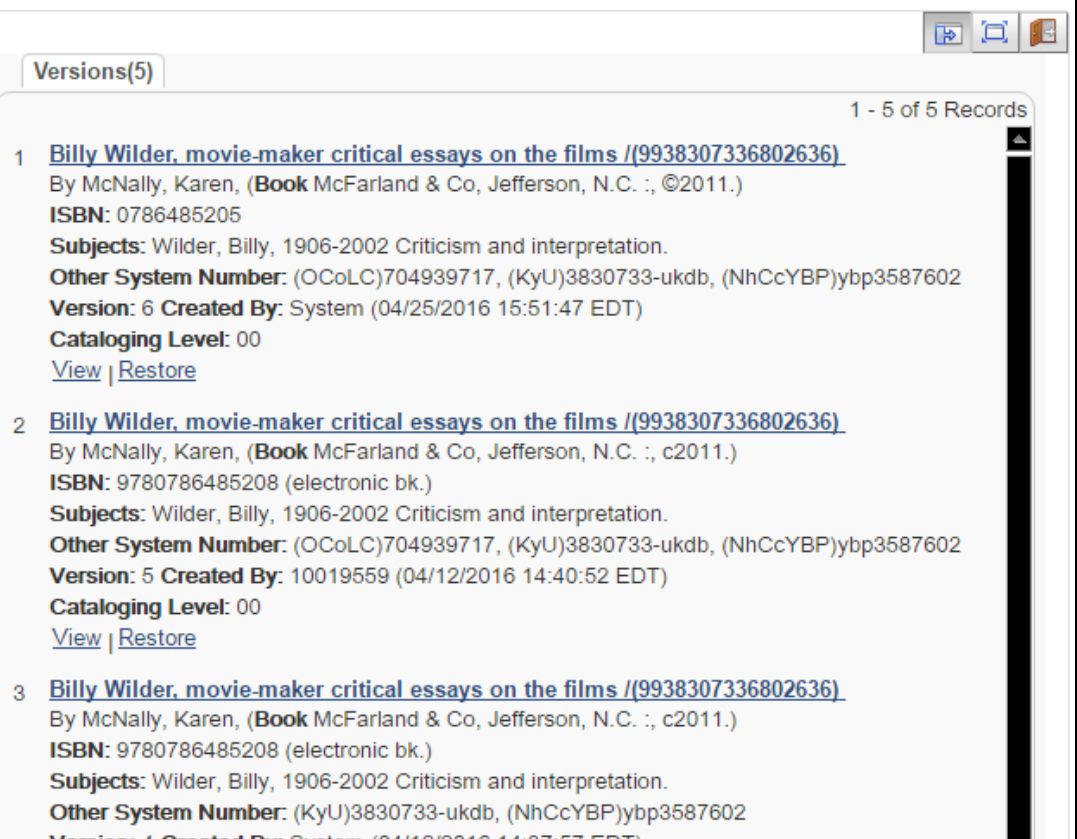
VOYAGER: RAIDERS OF THE LOST MARC

- In Voyager, if you replace or delete a record, it's "gone"
- But not really, Voyager keeps it on its server for a while
- My script retrieves / converts those files



ALMA: VERSION CONTROL

- All past versions of bib records are retained
- Available from Metadata Editor under Tools --> View Versions
- Restore a previous version



The screenshot displays a web interface titled "Versions(5)" with a sub-header "1 - 5 of 5 Records". It lists three versions of a bibliographic record for the book "Billy Wilder, movie-maker critical essays on the films // (9938307336802636)".

Version	Created By	Created Date
1	System	04/25/2016 15:51:47 EDT
2	10019559	04/12/2016 14:40:52 EDT
3	System	04/12/2016 14:37:57 EDT

Each entry includes the following details:

- Title:** [Billy Wilder, movie-maker critical essays on the films // \(9938307336802636\)](#)
- Author:** By McNally, Karen, (Book McFarland & Co, Jefferson, N.C. :, ©2011.)
- ISBN:** 0786485205 (Version 1), 9780786485208 (electronic bk.) (Versions 2 & 3)
- Subjects:** Wilder, Billy, 1906-2002 Criticism and interpretation.
- Other System Number:** (OCoLC)704939717, (KyU)3830733-ukdb, (NhCcYBP)ybp3587602
- Cataloging Level:** 00
- Actions:** [View](#) | [Restore](#)

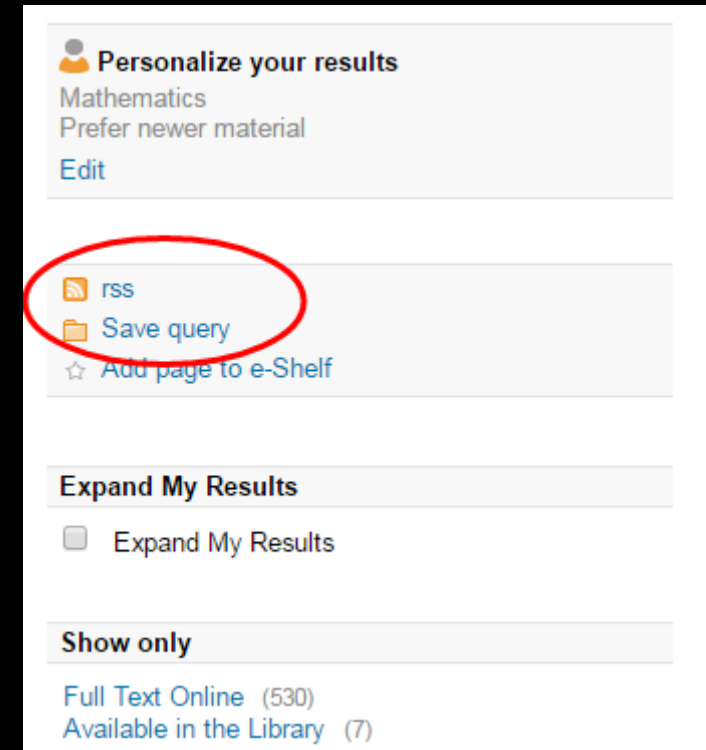
VOYAGER: EBOOKMOBILE

- For new books, we used Michael Doran's "New Books List" code
 - Worked very well for **our** physical resources, but not **our** electronic
 - No item records
 - No call numbers
- Ebookmobile
 - Ran arbitrary queries
 - Atom (like RSS) feeds of new materials



PRIMO: RSS / SAVE QUERY

- RSS and Save Query options on search results pages
- Works for any kinds of titles in Primo
- Subscribe to feed or receive new results by email



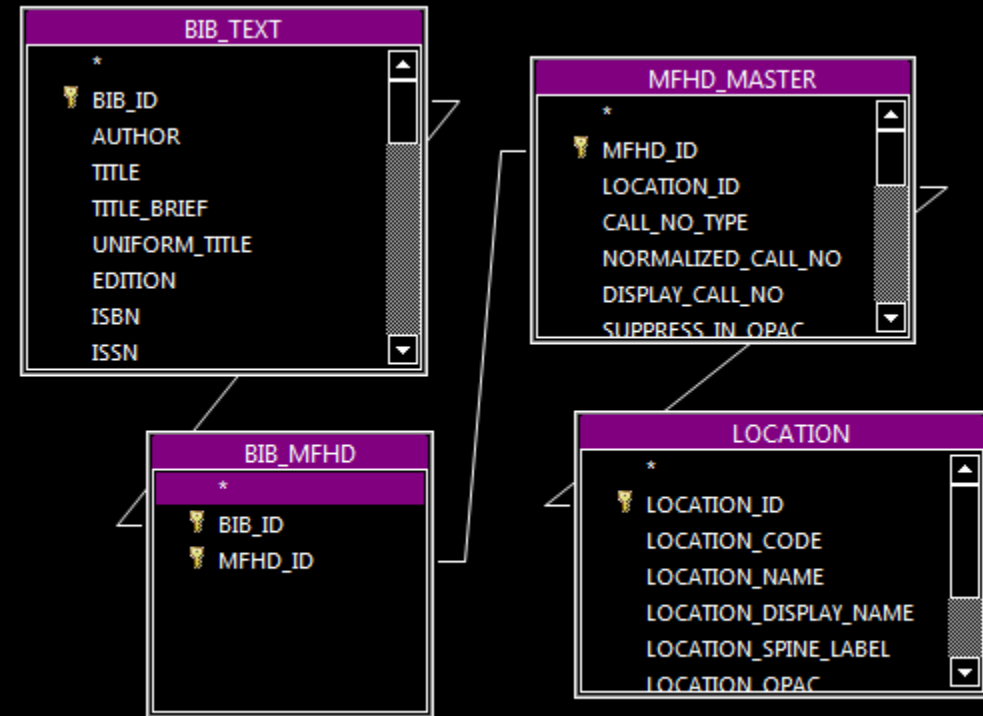
ALMA / PRIMO: SOME OTHER FEEDS STILL NEEDED

- We had a feed of original cataloging from our library
 - Searched 040 for our symbol
- Not all fields accessible through Primo search
- Not all fields indexed in Alma

The screenshot shows a web interface for a catalog feed. At the top, the title is "Original Cataloging From KUK" with a checkmark, refresh, and settings icon. Below the title, it says "No unread articles — 1 readers". A grey bar contains the text "No unread articles. Refresh.". The date "DEC 19 2015" is displayed. Two entries are listed, both titled "Jackson County, Kentucky : aerial photography index". The first entry's description is "Jackson County, Kentucky : aerial photography index / U.S. Department of Agriculture, Agricultural Adjustment Administration, Cartographic Section, East Central Division ; Iowa Aerial Surveys." with a "137d" call number and "hide // save" options. The second entry's description is "Jackson County, Kentucky : aerial photography index / U.S. Department of Agriculture, Agricultural Adjustment Administration, Cartographic Section, East Central Division ; Park Aerial Surveys, Inc." with a "137d" call number.

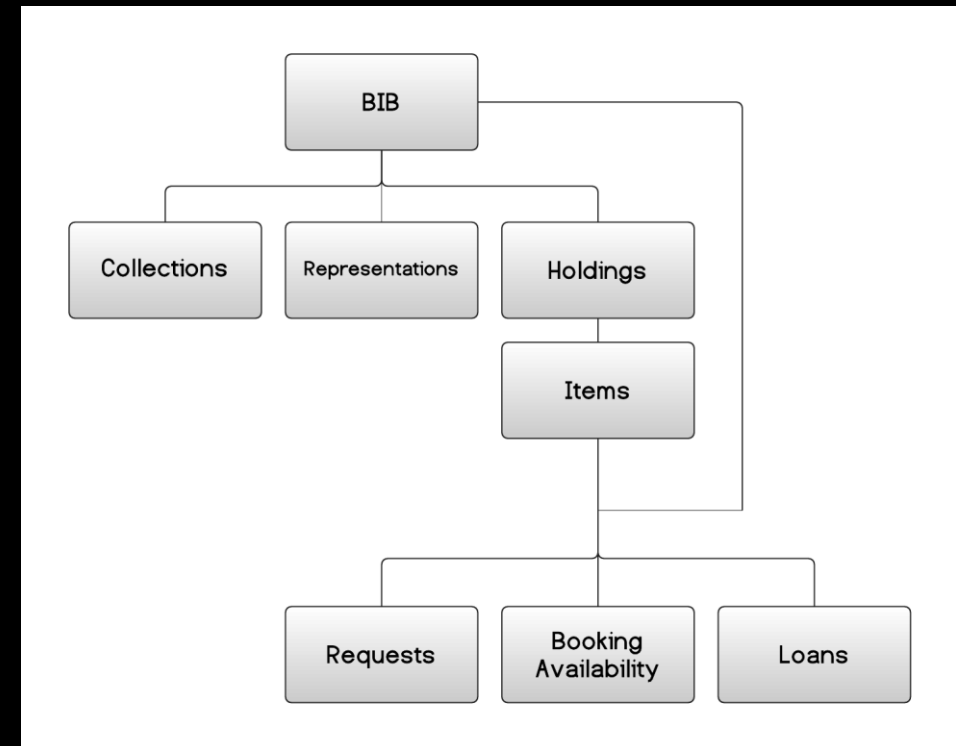
VOYAGER: SQL QUERIES

- Done through Microsoft Access or any Oracle client
- Query tables about bibliographic data, acquisitions, circulation, etc
- Many indexed fields, also BLOB



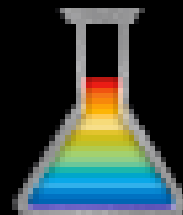
ALMA / PRIMO: API ACCESS

- In Alma, there are Web services for working with:
 - Acquisitions
 - Analytics
 - Bibs
 - Configuration
 - Courses
 - Resource Sharing Partners
 - Task Lists
 - Users



ALMA: SETTING UP APPLICATIONS USING API

- Create an account on the Ex Libris Developer Network
- Have your systems administrator attach your account to your database (or use sandbox)
- Create applications
 - Get API key for specific database and application



Developer Network

API

Bibs

Resource

/almaws/v1/bibs/{mms_id}

Method

GET

API Key

Hierarchy

Authentication (API Key)

Execute Request

Request

Query

Response

GET https://api-na.hosted.exlibrisgroup.com/almaws/v1/bibs/{mms_id}

mms_id	9925195106802636
view	string
expand	p_avail
<p>Add Parameter</p>	

ALMA: API EXPLORER

Try API calls with different parameters, view their output

Your API keys are easily selected and used

ALMA: FROM EXPLORER TO CODE

The screenshot displays a REST client interface with three tabs: 'Request', 'Query', and 'Response'. The 'Query' tab is active, showing a GET request to the URL: `https://api-na.hosted.exlibrisgroup.com/almaws/v1/bibs/9925195106802636?expand=p_avail`. A dropdown menu is open on the right side of the interface, titled 'Show Code Sample...', with a search input field and a magnifying glass icon. The dropdown menu lists several programming languages and tools: 'Javascript' (highlighted in blue), 'Curl', 'Node', 'Python', 'PHP', 'Ruby', 'Objective C', and 'Java'.



VOYAGER: HIERARCHY BUTTON

Holdings and Items for bib 4083599

Bib ID	Title	Owning Library														
<input type="checkbox"/> 4083599	Introduction to agronomy : food, crops, and environment / Craig C. Sheaffer, Kristine M. Moncada.	UK_Main_Campus														
<table border="1"> <thead> <tr> <th>MFHD ID</th> <th>Location</th> <th>Call Number</th> <th>Order Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 4458772</td> <td>Agric Reserves</td> <td>SB91 .S48 2012</td> <td></td> </tr> </tbody> </table>			MFHD ID	Location	Call Number	Order Status	<input type="checkbox"/> 4458772	Agric Reserves	SB91 .S48 2012							
MFHD ID	Location	Call Number	Order Status													
<input type="checkbox"/> 4458772	Agric Reserves	SB91 .S48 2012														
<table border="1"> <thead> <tr> <th>Item ID</th> <th>Location</th> <th>Item Type</th> <th>Enum/Chron/Year</th> <th>Copy</th> <th>Item Status</th> <th>Item Barcode</th> </tr> </thead> <tbody> <tr> <td>3123998</td> <td>Agric Reserves [P]</td> <td>reserve</td> <td></td> <td>0</td> <td>Not Charged</td> <td>304255401920Z</td> </tr> </tbody> </table>			Item ID	Location	Item Type	Enum/Chron/Year	Copy	Item Status	Item Barcode	3123998	Agric Reserves [P]	reserve		0	Not Charged	304255401920Z
Item ID	Location	Item Type	Enum/Chron/Year	Copy	Item Status	Item Barcode										
3123998	Agric Reserves [P]	reserve		0	Not Charged	304255401920Z										

ALMA: API IN ACTION

Bib #994862636802636

Title: Journal of algebra

Network Numbers: (KyU)486263-ukdb (OCoLC)ocm01754425

Place of Publication: New York

Publisher: Academic Press

Mfhd #22228019690002636

Location: storage : rs

Call number: QA1 .J833

Item #23228016500002636

Barcode: 3042549428200

Description: v.318 (2007)

Item #23228016510002636

Barcode: 3042549427603

Description: v.317 (2007)

ANY QUESTIONS?

CONTACT ME

- Kathryn Lybarger
- Head, Cataloging and Metadata
- University of Kentucky

- GitHub: <http://www.github.com/zemkat/>
- Twitter: [@zemkat](https://twitter.com/zemkat)
- Tumblr: <http://problem-cataloger.tumblr.com/>