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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
• 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::$

\texttt{\textbf{IfWinActive, Voyager Cataloging}}

\{
\quad \texttt{Send \{F9\}}
\}
\texttt{else \{ \}
\quad \texttt{Send ^d}
\}
\texttt{Return}
"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.
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
ALMA: WHAT'S THAT H?

<table>
<thead>
<tr>
<th>File</th>
<th>Edit</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>![H Icon]</td>
</tr>
</tbody>
</table>

You have 3 warning(s) in your record

Working on -A study of chemiall (9925195106802636), Created

<table>
<thead>
<tr>
<th>LDR</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>9925195106802636</td>
</tr>
<tr>
<td>005</td>
<td>20160429163223.0</td>
</tr>
<tr>
<td>008</td>
<td>070516s2004#####xx#aa#######b#######000#0</td>
</tr>
<tr>
<td>035</td>
<td>†a (OCoLC)ocn145564377</td>
</tr>
<tr>
<td>035</td>
<td>†a (OCoLC)145564377</td>
</tr>
<tr>
<td>035</td>
<td>†a (KyU)2519510-ukdb</td>
</tr>
<tr>
<td>040</td>
<td>†a KUK †c KUK</td>
</tr>
<tr>
<td>049</td>
<td>†a KUKK</td>
</tr>
<tr>
<td>099</td>
<td>9 †a Theses †a 2004</td>
</tr>
</tbody>
</table>
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)
ALMA: TOO LONG FOR EXCEL NUMBERS

- MMS ID is 16 digits long
- We use Excel for project data
- Default is to truncate to 15 digits, display in scientific notation
- Change format to Text
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

- **Enable CR Suffix** – The scanner transmits a carriage return after each barcode.
- **Disable CR Suffix.**

- **Enable LF Suffix** – The scanner transmits a line feed after each barcode. Disabled when keyboard wedge defaults are loaded.
- **Disable LF Suffix.**

- **Enable Tab Suffix** – The scanner will transmit a TAB (ASCII 09H) after each barcode.
- **Disable Tab Suffix**

- **Enable ETX Suffix** – The scanner will transmit End of TeXt (ASCII 03H) after the barcode data.
- **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)
• 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
• 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
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 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 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")
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")

---

rule "Merge-External.dslr"

# 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
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
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
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
ALMA: API EXPLORER

Try API calls with different parameters, view their output

Your API keys are easily selected and used

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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>mms_id</td>
<td>9925195106802636</td>
</tr>
<tr>
<td>view</td>
<td>string</td>
</tr>
<tr>
<td>expand</td>
<td>p_avail</td>
</tr>
<tr>
<td>Request</td>
<td>Query</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
</tr>
</tbody>
</table>

```
```
**VOYAGER: HIERARCHY BUTTON**

### Holdings and Items for bib 4083599

<table>
<thead>
<tr>
<th>Bib ID</th>
<th>Title</th>
<th>Owning Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>4083599</td>
<td>Introduction to agronomy: food, crops, and environment / Craig C. Sheaffer, Kristine M. Moncada.</td>
<td>UK_Main_Campus</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>MFHD ID</th>
<th>Location</th>
<th>Call Number</th>
<th>Order Status</th>
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</thead>
<tbody>
<tr>
<td>4458772</td>
<td>Agric Reserves</td>
<td>SB91.S48 2012</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<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>
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</table>
### ALMA: API IN ACTION

<table>
<thead>
<tr>
<th>Bib ID</th>
<th>994862636802636</th>
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</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td>Journal of algebra</td>
</tr>
<tr>
<td><strong>Network Numbers:</strong></td>
<td>(KyU)486263-ukdb (OCoLC)ocm01754425</td>
</tr>
<tr>
<td><strong>Place of Publication:</strong></td>
<td>New York</td>
</tr>
<tr>
<td><strong>Publisher:</strong></td>
<td>Academic Press</td>
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</table>

<table>
<thead>
<tr>
<th>Mfhd ID</th>
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</thead>
<tbody>
<tr>
<td><strong>Location:</strong></td>
<td>storage : rs</td>
</tr>
<tr>
<td><strong>Call number:</strong></td>
<td>QA1 .J833</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item ID</th>
<th>23228016500002636</th>
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<tbody>
<tr>
<td><strong>Barcode:</strong></td>
<td>3042549428200</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td>v.318 (2007)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Item ID</th>
<th>23228016510002636</th>
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</thead>
<tbody>
<tr>
<td><strong>Barcode:</strong></td>
<td>3042549427603</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td>v.317 (2007)</td>
</tr>
</tbody>
</table>
Contact Me

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

- GitHub: http://www.github.com/zemkat/
- Twitter: @zemkat
- Tumblr: http://problem-cataloger.tumblr.com/