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

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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
  • :bn::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

```c
$^d::
IfWinActive, Voyager Cataloging
{
  Send {F9}
} else {
  Send ^d
}
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><img src="image" alt="H" /></td>
</tr>
</tbody>
</table>

You have 3 warning(s) in your record

Working on -A study of chemically (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#a####b####000#0</td>
</tr>
<tr>
<td>035</td>
<td>†a (OCoLC)ocn145564377</td>
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<tr>
<td>035</td>
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</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 date.
- 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
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 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")
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*")

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
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
• All past versions of bib records are retained

• Available from Metadata Editor under Tools --> View Versions

• Restore a previous version
• 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: ANALYTICS

Expenditures - Annual Trend

-500K - 0K - 500K - 1,000K - 1,500K - 2,000K - 2,500K - 3,000K - 3,500K - 4,000K


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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
VOYAGER: HIERARCHY BUTTON
<table>
<thead>
<tr>
<th>Bib #994862636802636</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong> Journal of algebra</td>
</tr>
<tr>
<td><strong>Network Numbers:</strong> (KyU)486263-ukdb (OCoLC)ocm01754425</td>
</tr>
<tr>
<td><strong>Place of Publication:</strong> New York</td>
</tr>
<tr>
<td><strong>Publisher:</strong> Academic Press</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Mfhd #22228019690002636</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location:</strong> storage : rs</td>
</tr>
<tr>
<td><strong>Call number:</strong> QA1 .J833</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Item #23228016510002636</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Barcode:</strong> 3042549427603</td>
</tr>
<tr>
<td><strong>Description:</strong> v.317 (2007)</td>
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</table>
ANY QUESTIONS?
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University of Kentucky

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