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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.
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>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
</tr>
<tr>
<td>Tools</td>
</tr>
</tbody>
</table>

You have 3 warning(s) in your record

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

<table>
<thead>
<tr>
<th>LDR</th>
<th>01275ctm#a2200337Ka#4500</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>
</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)
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
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*"
• 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)
• 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
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
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
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
ALMA: FROM EXPLORER TO CODE

VOYAGER: HIERARCHY BUTTON

### Holdings and Items for bib 4083599

<table>
<thead>
<tr>
<th>Bib ID</th>
<th>Title</th>
<th>Owning Library</th>
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<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>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>MFHD ID</th>
<th>Location</th>
<th>Call Number</th>
<th>Order Status</th>
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<tbody>
<tr>
<td>4458772</td>
<td>Agric Reserves</td>
<td>SB91 .S48 2012</td>
<td></td>
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<table>
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<th>Item Type</th>
<th>Enum/Chron/Year</th>
<th>Copy</th>
<th>Item Status</th>
<th>Item Barcode</th>
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<tbody>
<tr>
<td>3123998</td>
<td>Agric Reserves [P]</td>
<td>reserve</td>
<td>0</td>
<td>Not Charged</td>
<td>304255401920Z</td>
<td></td>
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<tr>
<td>Bib #</td>
<td>994862636802636</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Title:</strong></td>
<td>Journal of algebra</td>
<td></td>
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<td><strong>Network Numbers:</strong></td>
<td>(KyU)486263-ukdb (OCoLC)ocm01754425</td>
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<td><strong>Place of Publication:</strong></td>
<td>New York</td>
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<tr>
<td><strong>Publisher:</strong></td>
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<tbody>
<tr>
<td><strong>Location:</strong></td>
<td>storage : rs</td>
</tr>
<tr>
<td><strong>Call number:</strong></td>
<td>QA1 .J833</td>
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</tbody>
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<table>
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<td>3042549428200</td>
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<tr>
<td><strong>Description:</strong></td>
<td>v.318 (2007)</td>
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<tr>
<th>Item #</th>
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<tr>
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<td>3042549427603</td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td>v.317 (2007)</td>
</tr>
</tbody>
</table>
ANY QUESTIONS?
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