STARTING OVER:

CODING TO WORK WITH ALMA AFTER VOYAGER

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@zemkat

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#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:}:
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 record
  • 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?
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.
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-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:"099"X
  add MARC:"500"X
  add MARC:"601"X
  add MARC:"563"X
  add MARC:"599"X
  add MARC:"6XX"X
  add MARC:"8XX"
```

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""

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.
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: 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

<table>
<thead>
<tr>
<th>Request</th>
<th>Query</th>
<th>Response</th>
</tr>
</thead>
</table>

### 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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MFHD ID</th>
<th>Location</th>
<th>Call Number</th>
<th>Order Status</th>
</tr>
</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>
</tbody>
</table>
ALMA: API IN ACTION

<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>
</table>

<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>
</tr>
</tbody>
</table>
ANY QUESTIONS?
CONTACT ME

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