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A-Z Database Discovery using Alma: Eliminate Redundancy and Simplify your Workflow

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A-Z Database Discovery using Alma: Eliminate Redundancy and Simplify your Workflow



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A-Z Database Discovery using Alma: Eliminate Redundancy and Simplify your Workflow

EBUG 2017

Presented by:
Travis Clamon, MSIS

Background

- Travis Clamon, MSIS
Electronic Resource Specialist
- ETSU = ~15,000 Students / 2,000 employees
- Migrated to Alma & Primo in June 2015



Our E-Resource Workflow Goal

- Eliminate Redundant Data
- Simplify Workflow
- Improve Discovery
- User Experience



Electronic Resource Endpoints



The screenshot shows the Quillen College of Medicine Library website. At the top, there is a navigation bar with links for 'Admission', 'Guides', 'Help', 'Safety', 'A-Z Index', 'Quick Links', and 'People Finder'. Below this is a search bar with 'Search ETSU' and a dropdown arrow. The main content area features a 'Most Visited E-Sources' sidebar with logos for PubMed, DynaMed Plus, Clinical Key, STAT!Ref, and UpToDate. A central search box is titled 'Search E-Journals | E-Books & More | ETSU OneSearch' and includes a search input field and a 'Search' button. To the right, there are sections for 'Library News' and 'Winter Holidays 2015'. At the bottom, there is a 'Questions? Ask a Librarian!' button and a 'My Library' section with a clock icon. The footer contains contact information for the library and the university.



The screenshot shows the Charles C. Sherrod Library website. The top navigation bar includes the library name, a date and time display ('Wed Mar 16 2016 7:36am - 2am'), and social media icons. Below the navigation bar is a search bar with the text 'Find books, articles, media and more!' and a 'Search' button. The main content area is divided into several sections: 'Technology' (Computer Availability, Borrow a Laptop, Print, Copy, Scan, Charge a Mobile Device), 'Studying' (Spaces & Study Rooms, Testing Center, Tutoring), 'Research Tools' (Research and Course Guides, Write, Cite, Bibliography, Databases), and 'How To' (Access Off Campus, Borrow, Renew, Request, Reserve a Room). There are also sections for 'News and Events' and 'Academic Publications and P...'. The footer contains contact information for the library and the university.

ExLibris Primo



EAST TENNESSEE STATE UNIVERSITY

Electronic Resource Endpoints



Why this works for us?

1. Acquisitions inside Alma
2. Metadata responsibilities -> Electronic Resources Librarian



How did we accomplish our goal?

6 Steps:

- Assessment
- Metadata
- Alma Setup
- Primo Setup
- API's
- LibGuides A-Z



Step 1:

Assessment

- Identify Resources
- Compare with existing collections in Alma
- Develop Final list for metadata

- Review & Compare
- Full text collections should already exist in Alma
- Create Electronic Collections of “Database” type if no portfolios exist (Abstract / Website / etc.)
- The final list will serve as a checklist for metadata



Step 2:

Metadata

- Create MARC Records for each database/resource
- MARCedit
- Permalinks recommended for URL's
- Create Authority Lists for Subjects, Providers, and Formats
- 245a = title
- 500a = database coverage
- 520a = short description
- 520b = long description
- 653a = keywords
- 913a-d = LibGuide Data
- 914a = Licensed / OA
- 917 = URL / Provider/Access Note
- 960a = ETSU subject
- 963a = Format



=LDR \\\nmi\22\\\u\4500
=008 \\\u\\\s\\\000\0\eng\d
=245 00\$aCriminal Justice
=500 \\\\$aDatabase coverage: 1981-current.
=520 \\\\$aFull-text coverage of crime and its social and legal implications.\$bSupports research on crime, its causes and impacts, legal and social implications, litigation, and crime trends. Includes correctional and law enforcement trade publications, crime reports, and other material relevant to careers in criminal justice and law enforcement.
=653 \\\\$aAddiction
=653 \\\\$aCriminology
=653 \\\\$aCorrections administration
=653 \\\\$aCriminal law
=653 \\\\$aFamily law
=653 \\\\$aIndustrial security
=914 \\\\$a18603235 \$c2017-06-30
=917 40\$3ProQuest\$u<http://libs.etsu.edu/links/cjft.html>\$zETSU
=960 \\\\$aCriminal Justice and Criminology
=960 \\\\$aPsychology
=960 \\\\$aSocial Work
=963 \\\\$aAbstract and Indexing

Sample MARC Record – Criminal Justice (ProQuest)



Refine My Results

Provider +

Format -

- Abstract and Indexing (151)
- E-Books (20)
- Images (12)
- Maps (1)
- Newspapers (11)
- Point of Care (14)
- Reference Tools (8)
- Streaming Media (10)
- Style Guides (3)
- Test Preparation (1)

Subject -

- Accountancy (8)
- Anthropology (9)
- Appalachian Studies (10)
- Archival Studies (1)
- Art (9)
- Audiology (9)
- Biological Sciences (27)
- Business (21)
- Cardiopulmonary Science (24)
- Career Resources (2)
- Chemistry (15)
- Communication Studies (6)
- Computing (19)
- Counseling (8)
- Criminal Justice and Criminology (11)
- Dental Hygiene (24)
- Digital Media (3)

Create a controlled vocabulary for all facet fields (Subject, Format, Provider, etc)

- Consult with staff and librarians
- This will eliminate variations of terms causing duplicate facet terms (“Computing” vs. “Computer Science”)

Before you begin creating records.....



Step 3: Alma Setup

- Import records using import profile
- Complete required fields for all electronic collections
- Search Index – Easy find
- Associate to Alma set or top level collection



Profile Details

Profile name	Database LOAD		
Profile description	Import Database MARC Records		
Originating system	Other	File name patterns	-
Import Protocol	Upload File/s	Cross walk	No
Physical source format	Binary		
Encoding format	ISO8859_1		
Source format	MARC21 Bibliographic	Target format	MARC21 Bibliographic
Status	Active		

Match Profile

Serial match method	001 To MMS_ID Match Method
Non Serial match method	001 To MMS_ID Match Method

Match Actions

Handling method	Automatic
Upon match	Overlay
Merge/Overlay	Merge method Database Overlay
Allow bibliographic record deletion	No
Do not override/merge a non-brief record with a brief version	No
Unlink bibliographic records from community zone	No
Do not override/merge record with an older version	Disabled

DatabaseOverlay.dslr

```
rule "Database MARC Merge"
  when
    merge
  then
    replace MARC.XXX excluding "001"
  end
```

Allows overlay of local fields

Create Import Profile & Merge Rule

Resource description [Web of Science](#)

Electronic Collection name [Web of Science](#)

Electronic Collection Description General Information Additional Information Notes Group Settings History

Electronic Collection Information

Source Source ID

Creator

Alternative Title

Electronic Collection Level URL

Electronic Collection Level URL (override)



Electronic Collection is free? Not Free Free

Electronic Collection Proxy Enable No Yes

Electronic Collection Proxy Selected

Language

Electronic Collection Proxy Category

Additional descriptive information  

Number of portfolios 0 Character set -

Complete required fields for all electronic collections

Electronic Collection Level URL (ETSU uses short permalinks)

Additional descriptive information



The screenshot displays the 'Repository Search' interface. At the top, a search bar contains the text 'Find All titles where Local field 917 contains ETSU'. A blue arrow points to the search bar. Below the search bar, there are tabs for 'Institution' and 'Community'. The left sidebar shows 'Limit results to:' with filters for 'Inventory', 'Material Type' (Book (1), Computer file (204)), 'Language' (English (205)), 'Publication Year' (1998 (1), 2016 (1)), 'Collection' (ETSU Databases (196)), and 'Resource Type'. The main content area shows search results sorted by Rank. The first three results are:

- SciFinder**
Computer file (Other material - Electronic)
 Subject: Biographies Language: English
 Collections: [ETSU Databases](#)
 Availability: [Electronic collection](#) SciFinder
- Safari Books Online (TN Board of Regents Collection)**
Computer file (Other material - Electronic)
 Language: English
 Collections: [ETSU Databases](#)
 Availability: [Electronic collection](#) Safari Books Online
- Gale Virtual Reference Library**
Computer file (Other material - Electronic)
 Subject: Arts & Entertainment -- Biography & Genealogy -- Business & Economics and others Language: English
 Collections: [ETSU Databases](#)
 Availability: [Electronic collection](#) Gale Cengage Virtual Reference Library

Each result includes a barcode icon and a set of navigation links: [Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to collection](#) | [View It](#) | [More info](#). The top right of the results area shows '1 - 20 of 205 Records' and a 'Tools' button.

Create Search Index to find DB's - Save as an Alma Set



General Details



Name ETSU Databases Title [ETSU Databases](#)
 Description -
 External System - External ID Library ETSU Sherrod Library

Sub-collections (1) Title List (198)

Title List

Find : in : Title

1 2 3 1 - 20 of 198 Records Columns

MMS ID	Title	Material Type	
1 9951466402331	ARTstor	Computer file	<input type="button" value="View"/>
2 9969187302331	ClinicalKey	Computer file	<input type="button" value="View"/>
3 99164888202331	ACM Digital Library	Computer file	<input type="button" value="View"/>
4 99164987402331	MathSciNet	Computer file	<input type="button" value="View"/>
5 99167786602331	CABI Global Health	Computer file	<input type="button" value="View"/>
6 99173587902331	Canadian Newsstand Complete	Computer file	<input type="button" value="View"/>
7 99174486302331	Snapshots	Computer file	<input type="button" value="View"/>
8 99174486402331	FIAF Index to Film Periodicals Plus	Computer file	<input type="button" value="View"/>
9 99174486502331	Public Health	Computer file	<input type="button" value="View"/>
10 99174486602331	Telecommunications	Computer file	<input type="button" value="View"/>
11 99174486702331	Science Journals	Computer file	<input type="button" value="View"/>
12 99174486802331	Research Library	Computer file	<input type="button" value="View"/>
13 99174486902331	Religion	Computer file	<input type="button" value="View"/>
14 99174487002331	Psychology Journals	Computer file	<input type="button" value="View"/>

Create Top Level Collection / Import records from Alma Set

Step 4:

Primo Setup

- Allows for better visibility of database results in Primo

- Normalization (Display / Linking Fields)
- Code Tables
- Search Fields



MARC	Field	PNX
245a	Title	/display/title
500a	Coverage	/display/lds16
520a	Short description	/display/lds17
520b	Long description	/display/description
653a	Keywords	/display/subject
914a	Licensed / OA	/display/lds14
917	URL	/links/lln01
960a	ETSU Subject	/display/lds15
963a	Format	/facets/lfc12
917 40 \$3	Provider	/display/lds10

Create normalization rules / MARC to PNX



> Code Tables

Update for Owner: 01ETSU - East Tennessee State University Sub System: FRONTEND Table Name : FrontEnd Display Fields Search

Code Table Rows

Enabled	Field Code ▲▼	Field Name ▲▼	Language ▲▼
	<input type="text"/>	<input type="text"/>	All ▼
<input checked="" type="checkbox"/>	lds10	Provider	en_US
<input type="checkbox"/>	lds12	lds12	pt_BR
<input checked="" type="checkbox"/>	lds11	Link	en_US
<input checked="" type="checkbox"/>	lds12	Database Format	en_US
<input checked="" type="checkbox"/>	lds13	Access Note	en_US
<input checked="" type="checkbox"/>	lds14	License	en_US
<input checked="" type="checkbox"/>	lds15	Database Subjects	en_US
<input checked="" type="checkbox"/>	lds16	Database Coverage	en_US
<input checked="" type="checkbox"/>	lds17	Database Short Description	en_US

Front End Display Fields



> **Code Tables**

Update for Owner: 01ETSU - East Tennessee State University Sub System: FRONTEND Table Name : Basic Index Fields ▼



Isr15

Database Subject

en_US

Allows custom fields to be searchable

ABI/INFORM Complete

ProQuest

● **Online access**

View Online

Details

[Actions](#) ▾

Title: ABI/INFORM Complete

Subjects: Business; Economic conditions; Corporate strategies; Management theory; Management techniques; Business trends; Market and industry reports; Product information; Accounting; Finance

Description: Business research database Comprehensive business research database including full-text journals, trade publications, market reports, industry reports, working papers, dissertations, business cases, and conference proceedings.

Language: English

Source: 01ETSU ALMA

Provider: ProQuest

Link: <http://libs.etsu.edu.iris.etsu.edu:2048/links/abi.html>

License: Licensed

Database Format: Abstract and Indexing

Database Subjects: Accountancy
Business
Economics and Finance
Management and Leadership
Marketing
Public Administration
Public Health
Regional and Community Studies
Sport Leadership and Management

Links

> [ETSU Database Link](#)

Primo View



Step 5: API Integration

ExLibris Developers Site:

<https://developers.exlibrisgroup.com/primo/apis/webservices/gettingstarted>

- Retrieving DB Records from Alma
- Data Parsing
- Arrays & Display



ExLibris Developers Site

- <https://developers.exlibrisgroup.com/>
- Need API Key
- Test API's – Within Site
- Useful Output Snippets (cURL)

- New API's have been added since this inception for Electronic Collections



2) Retrieve Bibs

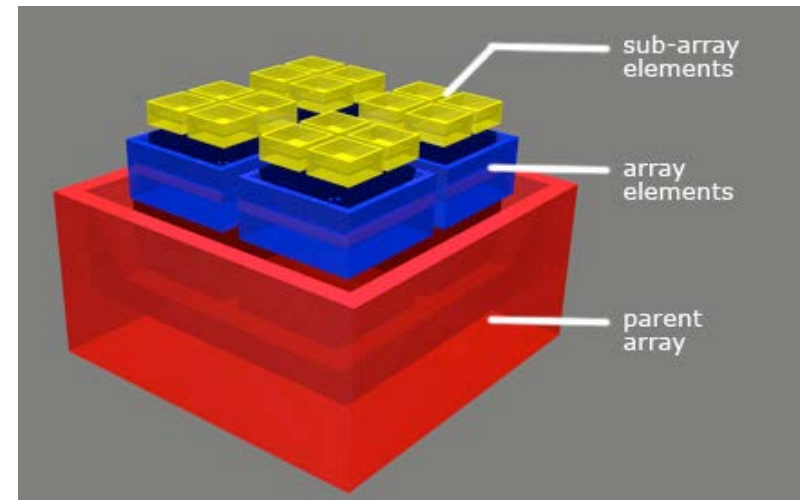
Run Array through FOR loop
GET /almaws/v1/bibs

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<bibs>
  <bib>
    <mms_id>9951466402331</mms_id>
    <record_format>marc21</record_format>
    <linked_record_id/>
    <title>ARTstor</title>
    <holdings link="https://api-na.hosted.exlibrisgroup.com/almaws/v1/bibs/9951466402331/holdings"/>
    <created_by>import</created_by>
    <created_date>2015-05-31Z</created_date>
    <last_modified_by>System</last_modified_by>
    <last_modified_date>2017-02-15Z</last_modified_date>
    <suppress_from_publishing>false</suppress_from_publishing>
    <originating_system>OTHER</originating_system>
    <originating_system_id>b24457231-01etsu_inst</originating_system_id>
    <record>
      <leader>01358nmi a2200373 u 4500</leader>
      <controlfield tag="001">9951466402331</controlfield>
      <controlfield tag="005">20160609094957.0</controlfield>
      <controlfield tag="008">150531u s 000 0 eng d</controlfield>
      <datafield ind1="0" ind2="0" tag="245">
        <subfield code="a">ARTstor</subfield>
      </datafield>
      <datafield ind1=" " ind2=" " tag="520">
        <subfield code="a">Digital images in the arts, architecture, humanities, and sciences</subfield>
        <subfield code="b">The ARTstor Digital Library provides more than one million digital images in the arts, architecture, humanities, and sciences with an accessible suite of software tools for teaching and research. The community-built collections comprise contributions from outstanding international museums, photographers, libraries, scholars, photo archives, and artists and artists' estates.</subfield>
      </datafield>
      <datafield ind1=" " ind2=" " tag="653">
        <subfield code="a">Arts</subfield>
      </datafield>
    </record>
  </bib>
</bibs>
```



Parsing Data

- Multiple ways of storing data from the Retrieve Bibs API Calls
- PHP SimpleXMLElement() – Digests CURL response to XML
- Stored XML fields from each Database into a multidimensional array.



https://exoboy.files.wordpress.com/2010/07/multi-array_box.jpg



Array Output Example

- https://libs.etsu.edu/sherrod/databases/libguides/db_query.php?subject=Computing

[ACM Digital Library](#)

Association for Computing Machinery (ACM) Association for Computing Machinery (ACM) publications online

[Advanced Technologies and Aerospace Collection](#)

ProQuest High Technology and Aerospace sciences - journal articles

[Annual Reviews](#)

Annual Reviews Articles from Annual Reviews

[Applied Science and Technology Full-Text](#)

EBSCO Core literature in applied science including engineering, computers, informatics.

[arXiv](#)

Cornell University Library Open access articles in physics, mathematics, computer science, quantitative biology, qu

[Career and Technical Education Database](#)

ProQuest Vocational information and career search resources

[Computer and Information Systems Abstracts](#)

ProQuest Applied and theoretical computing applications.

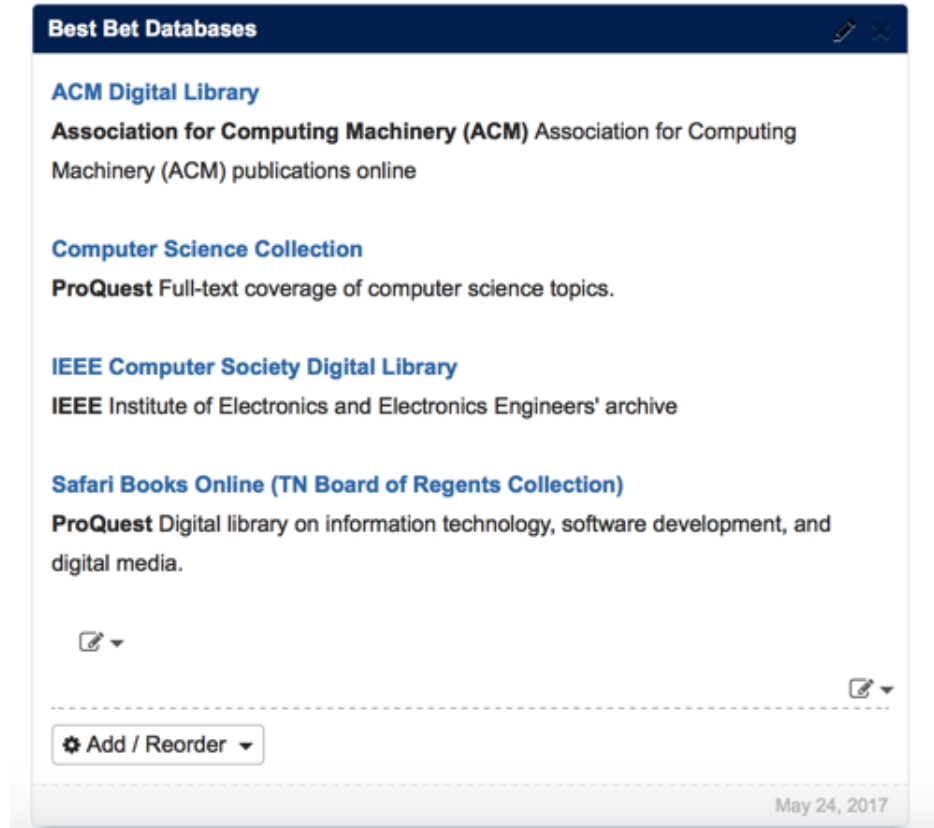
[Computer Database](#)

Gale Up-to-date technology information



Remote Script - Subject Guides

- Used in ETSU's Subject Guides
- Add a "Remote Script" widget.
- Use API URL from last slide.



The screenshot shows a widget titled "Best Bet Databases" with a dark blue header. Below the header, there is a list of databases, each with a blue title and a description:

- ACM Digital Library**
Association for Computing Machinery (ACM) Association for Computing Machinery (ACM) publications online
- Computer Science Collection**
ProQuest Full-text coverage of computer science topics.
- IEEE Computer Society Digital Library**
IEEE Institute of Electronics and Electronics Engineers' archive
- Safari Books Online (TN Board of Regents Collection)**
ProQuest Digital library on information technology, software development, and digital media.

At the bottom of the widget, there is a dashed line, a "Add / Reorder" button with a gear icon, and a date "May 24, 2017" in the bottom right corner.



Step 6:

LibGuides A-Z

- How to get data from Alma
- Data fields
- Adding/Deleting Resources



A-Z Databases

Find the best library databases for your research.

All Subjects ▾ All Database Types ▾ All Vendors / Providers ▾ Search for Databases Go

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #

236 Databases found

A

[ABI/INFORM Collection](#)

Business research database
[more...](#)



[AccessMedicine](#)

Multimedia resource for medical education and clinical practice
[more...](#)



[AccessPharmacy](#)

Multimedia resource for pharmacy education and practice
[more...](#)



[Accounting, Tax, and Banking Collection](#)

Current accounting, taxation, and financial management information for professionals
[more...](#)



Popular Databases

The most frequently-used databases

[CINAHL Complete](#)

Full-text for nearly 1400 journals back to 1937 for many of the most-used journals in nursing and allied health. Topics covered include nursing, biomedicine, health sciences librarianship, alternative/complementary medicine, consumer health and 17 allied health disciplines. Provides access to health care books, nursing dissertations, selected conference proceedings, standards of practice, audiovisuals, book chapters and searchable cited references. Follows the structure of the Medical Subject Headings (MeSH) used by the National Library of Medicine. (Source: Provider Web Site)



[ERIC](#)

DOE-sponsored Education database.
[more...](#)



[JSTOR](#)

Comprehensive academic articles and E-Books
[more...](#)



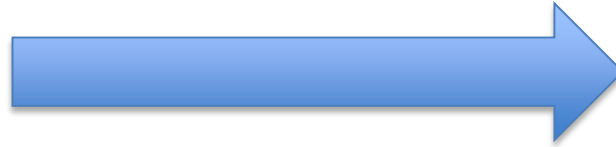
[PsycINFO](#)

Peer-reviewed literature in behavioral science and mental health
[more...](#)



How do we talk?

Alma



 LibGuides

- No “Automatic Way”
- LibGuides A-Z API – brand new but lacks functionality (missing fields)
- Only option: Excel Upload
- **Use Alma API from earlier to output CSV in Libguides Format**



Example

- See [GitHub](#) for Script Code (csv_export.php)
- Outputs CSV formatted correctly for LibGuides Import
- PHP -> Fputcsv()



LibGuides Excel Format

vendor	name	url	enable_p roxy	description	more_inf o	enable_n ew	enable_t rial	types	target
ARTstor	ARTstor	http://libs.et	0	Digital images in	The ARTst	0	0	Images;	2
Elsevier	ClinicalKe	http://libs.et	0	Multimedia reso	ClinicalKe	0	0	Abstract a	2
Associatic	ACM Digit	http://libs.et	0	Association for C	Full-text a	0	0	Abstract a	2

best_bets	subjects	desc_pos	enable_p opular	enable_h idden	internal_ note	resource _icons
Art;	Sociology; Theater; G	1	0	0	Last sync:	17071;
Nursing; Medicine;	Cardiopulmonary Scie	1	0	0	Last sync:	17071;
Computing;	Astronomy; Digital M	1	0	0	Last sync:	17071;

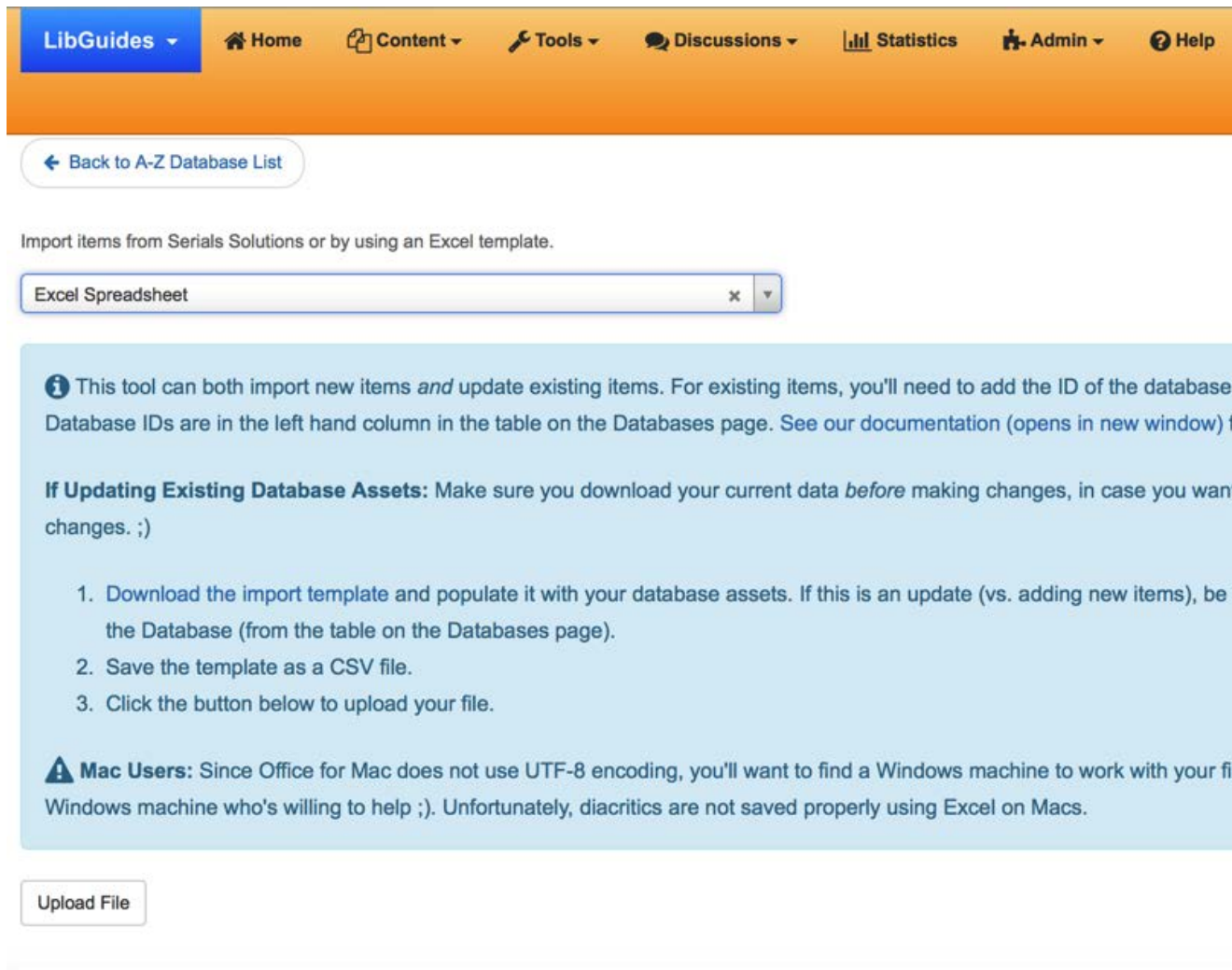


Before you import DB data

- LibGuides assigns DB assets a “content_id”
- You will want to place this content_id in your MARC record
 - =914 \\\$a18603235
- Otherwise LibGuides will create new DB assets with each excel upload, instead of updating existing assets.



LibGuides Import Screen



The screenshot shows the LibGuides Import Screen. At the top is a navigation bar with the following items: LibGuides (with a dropdown arrow), Home (with a house icon), Content (with a folder icon and a dropdown arrow), Tools (with a wrench icon and a dropdown arrow), Discussions (with a speech bubble icon and a dropdown arrow), Statistics (with a bar chart icon), Admin (with a plus sign icon and a dropdown arrow), and Help (with a question mark icon). Below the navigation bar is a button labeled "Back to A-Z Database List". The main content area starts with the text "Import items from Serials Solutions or by using an Excel template." followed by a dropdown menu currently set to "Excel Spreadsheet". Below this is a light blue informational box containing the following text: "This tool can both import new items *and* update existing items. For existing items, you'll need to add the ID of the database to the file. Database IDs are in the left hand column in the table on the Databases page. See our documentation (opens in new window) for more information." It then includes a section titled "If Updating Existing Database Assets: Make sure you download your current data *before* making changes, in case you want to revert changes. ;)" followed by a numbered list: "1. Download the import template and populate it with your database assets. If this is an update (vs. adding new items), be sure to include the Database ID in the file name." "2. Save the template as a CSV file." "3. Click the button below to upload your file." At the bottom of the box is a warning icon and text: "Mac Users: Since Office for Mac does not use UTF-8 encoding, you'll want to find a Windows machine to work with your file. If you don't have a Windows machine who's willing to help ;). Unfortunately, diacritics are not saved properly using Excel on Macs." Below the informational box is an "Upload File" button.



Lessons Learned

- Primary Data repository = Alma
- A-Z List generated from Alma MARC data
- Updates made to DB MARC
 - Primo = Indexing
 - PHP Script= Instant
 - LibGuides A-Z = Upload CSV
- Delete DB?
 - Manual Delete from LibGuides (System Limitation)



Questions?

- Travis Clamon (clamon@etsu.edu)
- Thanks!
- GitHub URL:
https://github.com/clamon/alma_az_databases

