

Hacking the General Electronic Service

Using OTB functionality to provide user-centered services



What is a general electronic service?

In addition to services found in your own collection (such as full text, requests, and so forth), Alma enables you to define general HTTP services (such as searches in ProQuest dissertations and Amazon.com, Ask a Librarian, and so forth) to present to patrons in the Primo View It and Get It tabs.



Electronic Service Example (View It Display)



Old screen shot

- HTTP service
- Takes data from Alma and passes it to something else through an OpenURL
- Examples from [documentation](#): ILLiad request, ProQuest dissertation search

Reserve Request System: for users

Request from catalog

Manual request

Alma API



Request form front page



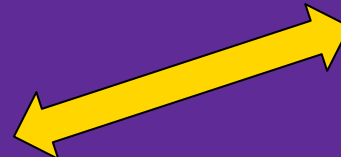
Choose loan period, library and streaming options



Choose course



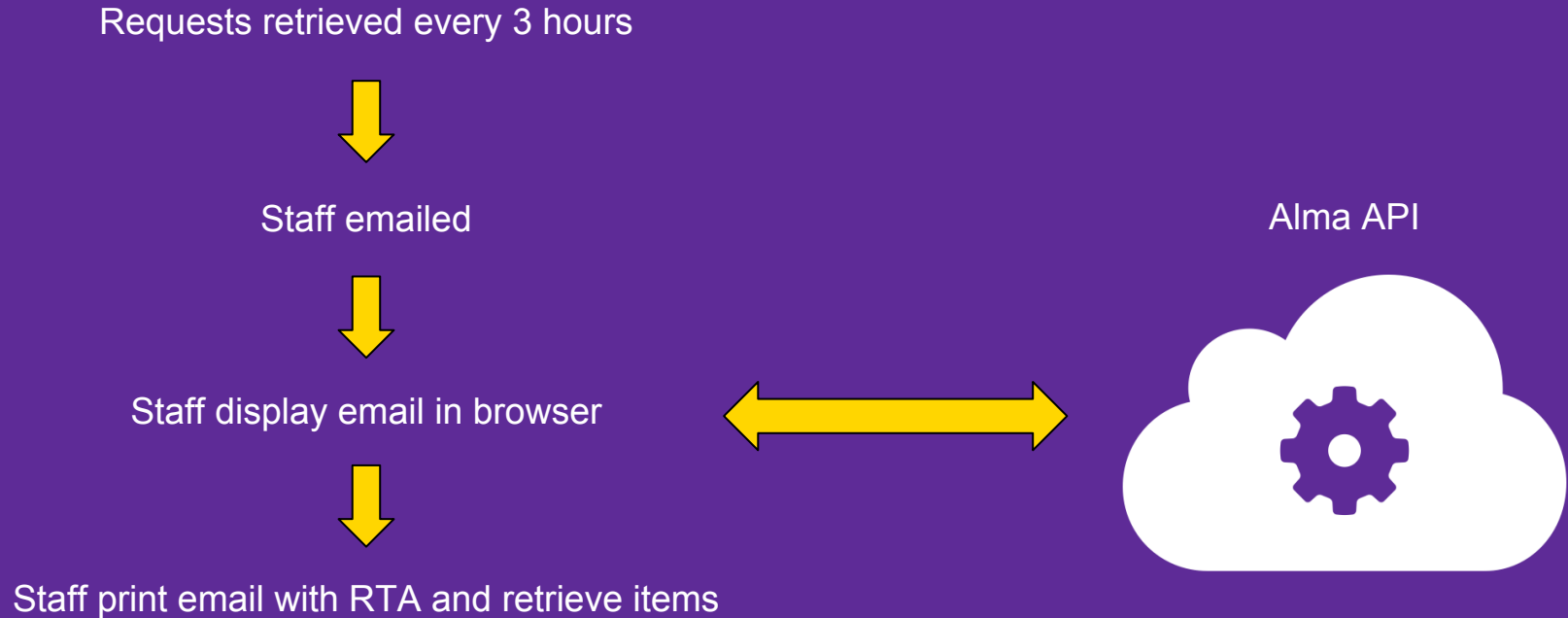
Done! Show confirmation page



Database



Reserve Request System: for staff



Reserve Request System: the best part

Users can resubmit requests!



What does it take to make this work?

Requesting from Catalog

1. Add norm rules to copy item metadata to the additional data fields (addata).
MMS ID is necessary for API queries
2. Change Almagetit template (warning!)
3. Create general electronic service that sends item metadata through OpenURL

Getting RTA for Staff Retrieval

1. Use MMS ID to query Alma API
2. Parse through XML returned from API to get availability
3. Display availability to staff

What does it take to make this work?

Requesting from Catalog → Add norm rules to copy metadata

Primo Back Office - Normalization Rules Sets → MARC → Additional Data

1. Display empty PNx fields
2. Choose field to use for MMS ID (we used bici)

[Go to bottom of page](#)

The screenshot shows the configuration interface for a normalization rule group named 'addata_bici'. The interface includes several sections: 'Rule group' with a text input containing 'addata_bici'; 'Source' set to 'MARC'; a table with columns 'Field', 'Ind1', 'Ind2', and 'Subfield' where the first row has '001' in the Field column and 'Exclude' in the Subfield column; 'Conditions' with a plus icon and the text 'No conditions Specified'; 'Transformations' with a plus icon; 'Transformation' with a dropdown set to 'Copy As Is' and an empty parameter field; 'Behavior' with an 'Action' dropdown set to 'ADD'; and a 'Test' button with a checkmark icon. A sidebar on the right contains navigation icons and a 'Test' button with a checkmark.

Field	Ind1	Ind2	Subfield
001			Exclude

What does it take to make this work?

Requesting from Catalog → Add norm rules to copy metadata

PNX - additional data section after norm rule changes

```
▼<adddata>
  <aulast>Sunstein</aulast>
  <aufirst>Cass R.,</aufirst>
  <au>Sunstein, Cass R.</au>
▼<btitle>
  #Republic : divided democracy in the age of social media
</btitle>
<addtitle>Hashtag republic</addtitle>
<date>2017</date>
<risdate>2017</risdate>
<isbn>0691175519</isbn>
<format>book</format>
<genre>book</genre>
<ristype>BOOK</ristype>
<notes>Includes bibliographical references and index.</notes>
▶<abstract>...</abstract>
  <mis1>21150301820002786</mis1>
  <oclcid>958799819</oclcid>
  <lccn>2016038668</lccn>
  <bici>991013240581102786</bici>
</adddata>
```


What does it take to make this work?

Requesting from Catalog → Change Almagetit template

Primo Back Office - Mapping Tables → Delivery → Templates



> Mapping Tables

Update for Owner: 01WIL - Williams College Sub System :

Delivery

Table Name :

Templates

Search in

Table:

Reset

Delete

Mapping Table Rows

Enabled	Code*	Template Code	Description	Last Updated	
	Almagetit				
<input checked="" type="checkbox"/>	Almagetit_remote	{{alma_base}}?ctx_enc=info:ofi/enc:L	Template for Almagetit_remote	01/04/17 By emery	Delete
<input checked="" type="checkbox"/>	Almagetit	{{alma_base}}?ctx_enc=info:ofi/enc:L	Template for Almagetit	04/25/17 By emery	Delete
<input checked="" type="checkbox"/>	almagetit_services	{{api_base}}/view/uresolver/{{alma_in	Template for Alma getit services from	07/14/16 By primo	Delete

Table Description: Link templates



What does it take to make this work?

Requesting from Catalog → Change Almagetit template



OTB template:

```
{[alma_base]}?ctx_enc=info:ofi/enc:UTF-8&ctx_id=10_1&ctx_tim={{timestamp}}&ctx_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&url_ver=Z39.88-2004&rfr_id=info:sid/primo.exlibrisgroup.com-{{control/sourceid}}&req_id={{pds_handle}}&rft_dat=[ie={{control/almaid}}]],language={{language}},view={{view}}&svc_dat=getit&user_ip={{userIp}}
```

New template:

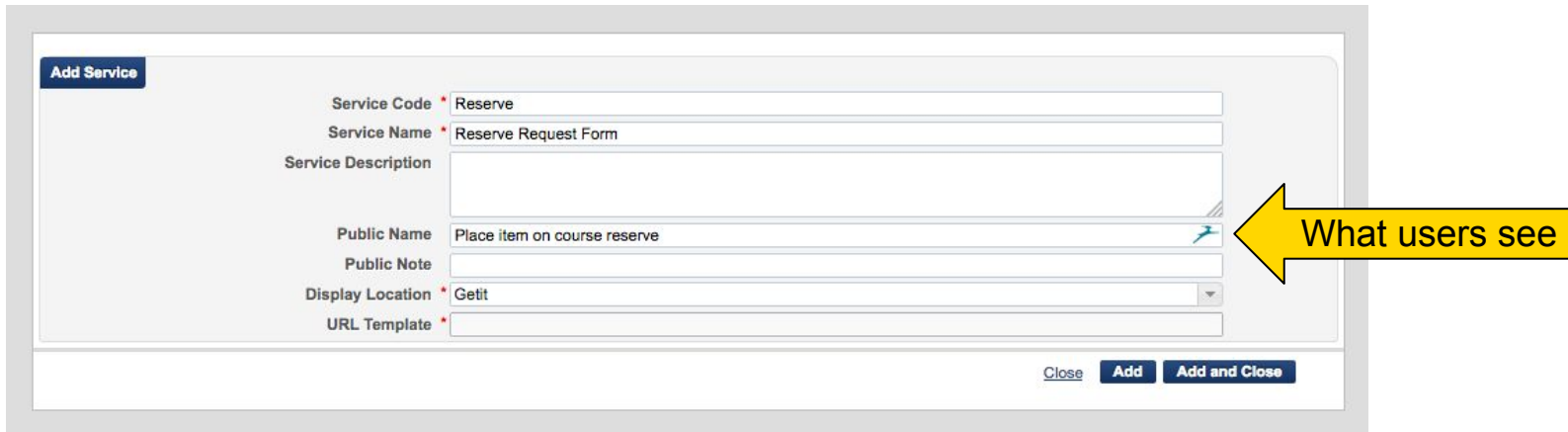
```
{[alma_base]}?ctx_enc=info:ofi/enc:UTF-8&ctx_id=10_1&ctx_tim={{timestamp}}&ctx_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&url_ver=Z39.88-2004&rfr_id=info:sid/primo.exlibrisgroup.com-{{control/sourceid}}&req_id={{pds_handle}}&rft_val_fmt=info:ofi/fmt:kev:mtx:{{addata/format}}&rft.genre={{addata/genre}}&rft.atitle={{addata/atitle}}&rft.jtitle={{addata/jtitle}}&rft.btitle={{addata/btitle}}&rft.aulast={{addata/aulast}}&rft.auinit={{addata/auinit}}&rft.auinit1={{addata/auinit1}}&rft.auinitm={{addata/auinitm}}&rft.ausuffix={{addata/ausuffix}}&rft.au={{addata/au}}&rft.aucorp={{addata/aucorp}}&rft.isbn={{addata/isbn}}&rft.bici={{addata/bici}}&rft_dat=[ie={{control/almaid}}]],language={{language}},view={{view}}&svc_dat=getit&user_ip={{userIp}}&req.skin=williams
```

What does it take to make this work?

Requesting from Catalog → Create general electronic service

Alma → Fulfillment → Fulfillment Configuration → Configuration Menu → Discovery Interface
Display Logic → General Electronic Services

1. Add Service



The screenshot shows the 'Add Service' form in the Alma system. The form is titled 'Add Service' in a blue button at the top left. It contains several input fields with red asterisks indicating required fields:

- Service Code ***: A text field containing 'Reserve'.
- Service Name ***: A text field containing 'Reserve Request Form'.
- Service Description**: A large text area that is currently empty.
- Public Name**: A text field containing 'Place item on course reserve'.
- Public Note**: A text field that is currently empty.
- Display Location ***: A dropdown menu with 'Getit' selected.
- URL Template ***: A text field that is currently empty.

At the bottom right of the form, there are three buttons: 'Close', 'Add', and 'Add and Close'. A yellow arrow points from the right side of the form to the 'Public Name' field, with the text 'What users see' inside the arrow's tail.

What does it take to make this work?

Requesting from Catalog → Create general electronic service

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1. Add Service

URL Template:

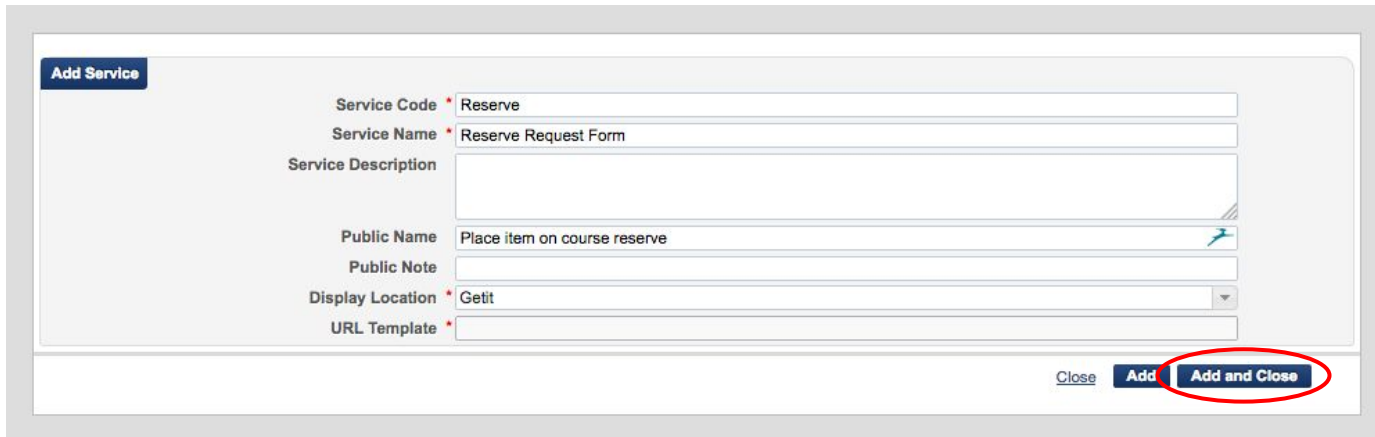
<https://librarytools.williams.edu/forms/newreserves/begin.php?author={rft.au}&title={rft.btitle}&publisher&isbn={rft.isbn}&year={rft.pubyear}&format={rft.genre}&mms={rft.bici}>

What does it take to make this work?

Requesting from Catalog → Create general electronic service

Alma → Fulfillment → Fulfillment Configuration → Configuration Menu → Discovery Interface
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1. Add Service



The screenshot shows the 'Add Service' form in the Alma system. The form is titled 'Add Service' in a blue button at the top left. It contains several input fields for service configuration:

- Service Code ***: A text field containing 'Reserve'.
- Service Name ***: A text field containing 'Reserve Request Form'.
- Service Description**: A large text area that is currently empty.
- Public Name**: A text field containing 'Place item on course reserve'.
- Public Note**: A text field that is currently empty.
- Display Location ***: A dropdown menu with 'Getit' selected.
- URL Template ***: A text field that is currently empty.

At the bottom right of the form, there are three buttons: 'Close', 'Add', and 'Add and Close'. The 'Add and Close' button is circled in red.

What does it take to make this work?

Requesting from Catalog → Create general electronic service

Alma → Fulfillment → Fulfillment Configuration → Configuration Menu → Discovery Interface
Display Logic → General Electronic Services

1. Edit service

The screenshot shows the 'Service Details' tab of the Alma Fulfillment Configuration interface. The 'Active' status is set to 'Active'. The 'Service Code' is 'Reserve' and the 'Service Name' is 'Reserve Request Form'. The 'Service Description' field is empty. The 'Public Name' is 'Place item on course reserve'. The 'Public Note' field is empty. The 'Display Location' is 'Getit'. The 'URL Template' is 'edu/forms/newreserves/begin.php?author={rt.au}&title={rt.btitle}&publisher&isbn={rt.isbn}&year={rt.pubyear}&format={rt.genre}&mms={rt.bic}'. The 'Enable without login' option is set to 'Yes'. The 'Disable service' option is set to 'Never'. There are four radio button options for when the resource is owned by the campus, institution, or both, but none are selected. The 'Cancel' and 'Save' buttons are at the bottom right.

Service Details | Service Availability Rules

Active: Active

Service Code * Reserve

Service Name * Reserve Request Form

Service Description

Public Name: Place item on course reserve

Public Note

Display Location * Getit

URL Template: edu/forms/newreserves/begin.php?author={rt.au}&title={rt.btitle}&publisher&isbn={rt.isbn}&year={rt.pubyear}&format={rt.genre}&mms={rt.bic}

Enable without login: ☒ Yes ☐ No

Disable service: ☒ Never

- ☐ When resource is owned by the campus
- ☐ When resource is owned by the campus and available
- ☐ When resource is owned by the institution
- ☐ When resource is owned by the institution and available

Cancel Save

What does it take to make this work?

Requesting from Catalog → Create general electronic service

Alma → Fulfillment → Fulfillment Configuration → Configuration Menu → Discovery Interface
Display Logic → General Electronic Services

1. Edit service

Service Details

Service Availability Rules

Filter

Add Rule

Columns

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1				Do not show for articles	-	Shriver, Emery	03/30/2017	<div>Actions</div>
2				Do not show for anything with atitle	-	Shriver, Emery	03/30/2017	<div>Actions</div>
3				Do not show for journals	-	Shriver, Emery	03/30/2017	<div>Actions</div>

Default Rule

[Default general electronic services rule](#)

Default general electronic services rule

[Edit](#)

Cancel

Save

What does it take to make this work?

Requesting from Catalog → Create general electronic service

Alma → Fulfillment → Fulfillment Configuration → Configuration Menu → Discovery Interface
Display Logic → General Electronic Services

1. Edit service

Edit rule

Name *	Default general electronic services rule		
Description	Default general electronic services rule		
Created By	Shriver, Emery	Created On	06/20/2016
Updated By	Shriver, Emery	Updated On	09/01/2016

Output Parameters

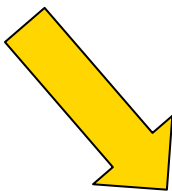
Name	Result
IsDisplay	* True

Cancel Save

What does it take to make this work?

Getting RTA for Staff Retrieval

- Use MMS ID to query Alma API
- Parse through XML returned from API to get availability
- Display availability to staff

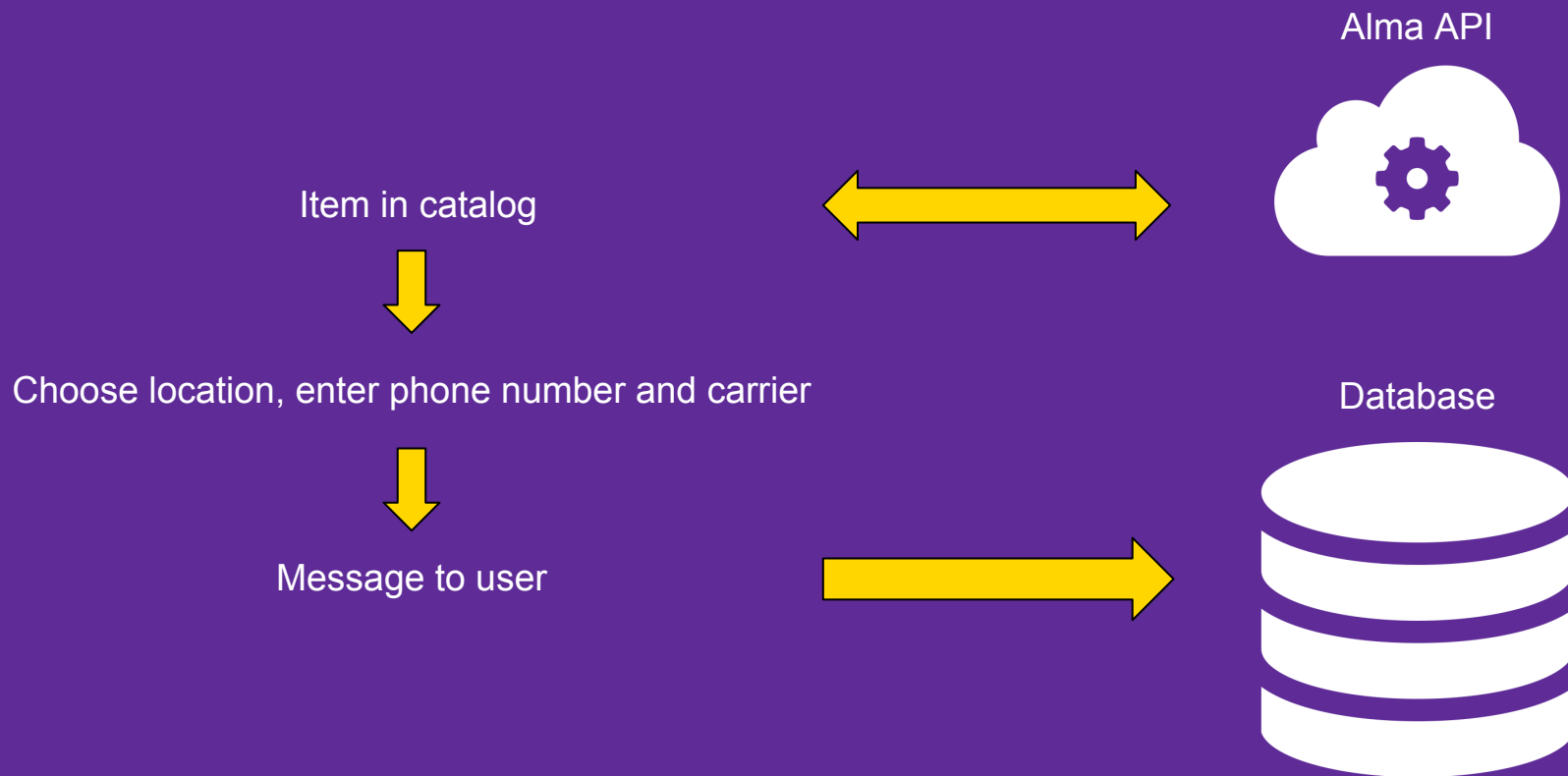


<https://github.com/emery-williams/reserve-request>

Demo time



Text a Call Number: for users



What does it take to make this work?

Requesting from Catalog → Create general electronic service

Alma → Fulfillment → Fulfillment Configuration → Configuration Menu → Discovery Interface
Display Logic → General Electronic Services

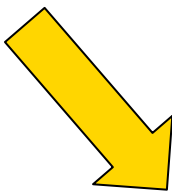
URL Template:

<https://librarytools.williams.edu/sms/begin.php?author={rft.au}&title={rft.btitle}&mms={rft.bici}>

What does it take to make this work?

Getting Item Info for User

- Use MMS ID to query Alma API
- Parse through XML returned from API to get locations and call numbers
- Display location choices to user

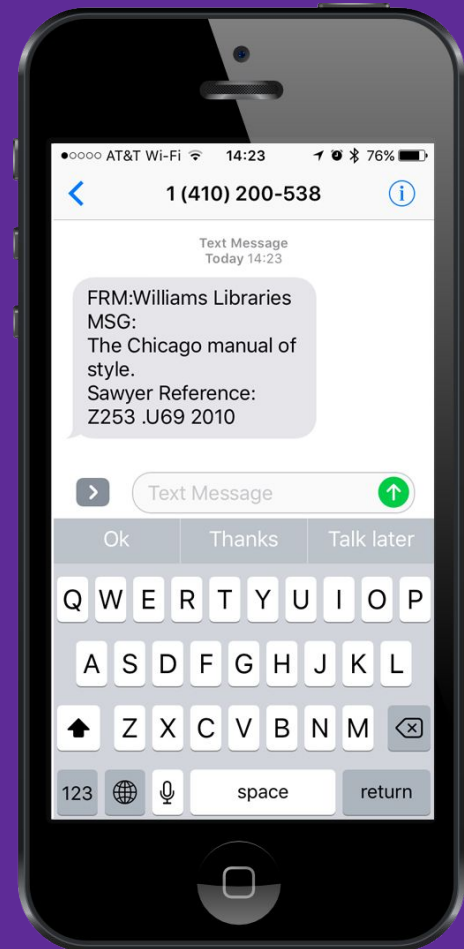


<https://github.com/emery-williams/sms>

Demo time



What it looks like



I want to know more!

Resources:

- GitHub repositories
 - [Reserve Request](#)
 - [Text a call number](#)
- Ex libris documentation
 - [General electronic service](#)
- Contact me!



Questions?



Credits

Images:

- Web API by Jonathan Coutiño from the Noun Project
- database by Yo! Baba from the Noun Project
- List by hans draiman from the Noun Project
- Caution by José Hernandez from the Noun Project
- Monitor Click by Nick Bluth from the Noun Project
- “Star GIF”, <https://media.giphy.com/media/3og0IMJcSI8p6hYQXS/giphy.gif>.