2019

**APIs and the Discovery Layer: Streamlining Workflows for Patrons and Staff**

Kelly Kobiela

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APIs and the Discovery Layer: Streamlining workflows for patrons and staff

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Background

- Marquette University
  - Private Jesuit University
  - 8,400+ undergraduates, 3,200 graduate
  - 83 majors, 68 doctoral and masters programs
  - 30 librarians, 30 staff
    - 5 person Library IT team
- I started at Marquette University as Systems Librarian in February 2018
- When I started, work on one of our APIs had already been started
A Tale of Two APIs

• Patron Functionality API
  – Connects EBSCO Discovery Service to Sierra
    • Place holds/requests
    • Renew from EDS

• EDS Harvesting API
  – Harvests our catalog into EDS
    • Take over weekly manual process
Patron Functionality API

- Original workflow to put holds on books from EDS
  - Search for the book in EDS
  - Click on item link to catalog
  - Click on Request
  - Log into Sierra account

- Desired workflow
  - Search for book in EDS
  - Click Request
  - Log into account
Patron Functionality API

- Worked started on this API in Mid-2017
- Holds only turned into all patron functionality
- A lot of the work has been done by III and EBSCO
- They needed: Sierra API Key for EBSCO, our catalog URL, test credentials and examples
Patron Functionality API

• First roadblock
  – We used to have Encore
  – The Sierra API was redirecting to our old Encore URL
  – We worked with III; they cleaned up all references to Encore

• Second roadblock
  – API only worked with Title-level holds
  – We had Item-level holds
Patron Functionality API

- Largest part of the project – switching from Item-level to Title-level holds
  - Had to coordinate main library and Law library
    - Law library had not done holds before
  - Had to coordinate with semester schedule
  - Actual work to change = very easy
  - Work involved to make sure everything works = so much time

- The API still has a lingering issue with bib vs item record numbers for titles where both libraries own a copy
Patron Functionality API
Patron Functionality API

https://libus.csd.mu.edu/iii/cas/login?service=https%3A%2F%2Flibus.csd.mu.edu%3A443%2Fiii%2Fsirra-api%2Fauthorize%3Fclient_id%

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<td>Marquette students, faculty, and staff: Use the top two boxes to enter your Marqnet/E-mail credentials.</td>
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<tr>
<td>Law Card Access Patrons: Please use the bottom two boxes to enter your information.</td>
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Marqnet/E-Mail Login: 

Marqnet/E-Mail Password: 

14-digit Barcode: 

First and Last Name: 

LOGIN
Patron Functionality API
Patron Functionality API
1. Streamlining **library services** : what we do, how much time it takes, what it costs, how we can do it better / Richard M. Dougherty.


**Subjects:** Library administration

![Find it @ MU](image_url)

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<td>Z678 .D6 2008</td>
<td>AVAILABLE</td>
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[Map It]

[Place Hold]

**#IUG2019**
Patron Functionality API

Place Hold
Title: The evaluation and measurement of library services.
I want to pick up at this location: 
The Raynor Circulation Desk ▼
Additional information including volume(s): 

Hold Confirmation
☑ The hold was successfully placed.

Remove Hold
Title: The evaluation and measurement of library services.
Are you sure you want to remove this hold?
Yes Cancel
Patron Functionality API

- Not active to patrons yet
- What is still not working?
  - In cases where both libraries own a copy, the hold is not being placed
    - III has not been able to replicate this error on their end
    - They are testing within our catalog now

- The good news
  - We have a request it button in the RTAC box that works
    - It sends patrons over to WebPac
  - It forced us to move to Title-level holds
Harvesting API

- Current Workflow: Every week we send an update to EBSCO
  - Additions
  - Deletions
    - Item record is marked with a D in a special field
  - Changes
- Yearly/multiple times a year full loads
- We had expressed an interest in trying out Harvesting our catalog into EDS when it was mentioned as a possibility
- We were contacted by EBSCO to beta test
Harvesting API

• Since we already had our catalog in EDS, we just had to update some information instead of going through the entire questionnaire
  – Normal EDS custom catalog questionnaire
  – Had phone call with EBSCO to confirm our lookup table and URL fields

• Also needed API key, etc. as above

• Our Cataloger, Calli Neumann did most of the work for this
  – She was the person doing the weekly loads
  – As a cataloger, she knew all the fields we needed
Harvesting API

• First roadblock
  – Our output tables did not work
    • Cannot edit own export tables
    • EBSCO worked with iii

• Second roadblock
  – The harvester ran into an error with one bib record, which caused it to fail
    • No one could find anything wrong with that record
    • EBSCO made an enhancement to skip records with errors
Harvesting API

• We made it to testing phase
  – EBSCO tested and notified us that our testing would happen

• However…EBSCO decided not to release the Harvesting API widely
  – They told us that we would be able to use it
  – It did not have the scaling capabilities needed to be rolled out

• And then….
Harvesting API

• We got an email from EBSCO asking if we would be interested in beta testing a EDS Harvesting API

• After confirming that we were already doing that…

• Within two weeks the III Harvester was added to our EDS test profile and is working
Harvesting API

• Test searching is working well

• Some clarifications we confirmed:
  – Full harvest will occur once a week
  – Daily incremental harvests will happen
  – Withdrawn items will be removed in the full harvest

• Still waiting to confirm what codes will be used to determine withdrawn items
Lessons Learned

• I had to continually check in with EBSCO to get updates
  – Every time I asked, they said they had still be working on it, but no proactive updates were really given to us without asking for them
  – Only got emails when there was a problem
  – Work WAS being done – I just wanted more communication

• Changing from item-level to title-level holds is MUCH harder that it looks on paper
  – Maybe not as difficult with only one branch/library
  – We ran into seemingly every problem under the sun
Lessons Learned

• Managing expectations is vital

• Whatever level of communication you are doing, do more!
  – At one point I started checking in with circ staff every day on issues with holds instead of waiting for them to bring problems to me

• These processes made me want to jump more into APIs
  – Especially ones we do ourselves so we have more control