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2019

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

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APIs and the Discovery Layer:

Streamlining workflows for patrons and staff

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 #IUG2019



Sunday, May 5th | Pre-Conference
Monday, May 6th – Wednesday, May 8th | Main Conference



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 Ill and EBSCO
- They needed: Sierra API Key for EBSCO, our catalog URL, test credentials and examples

Create New API Key

Client

Client Email

When the API Key is generated an email will be sent to this address.
The client will need to verify their address and pick a client secret to complete registration.

Expiration Date

☒ No Expiration

☐ Expiration Date

Patron
Permission

Roles

☐ Patron-specific Authentication ?

☐ Acquisitions Write

☐ Agencies Read

☐ Authorities Read

☐ Bibs Read

☐ Branches Read

☐ Currencies Read

☐ Fines Read

☐ Funds Read

☐ Holdings Read

☐ Invoices Read



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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

New search Library catalog Research guides Research databases Publications Main Library Law Library Get Patron Data Folder Ask

MARQCAT
plus

 **MARQUETTE**
UNIVERSITY
Raynor Memorial Libraries








Keyword Search ?

[Search Options](#) [Basic Search](#) [Advanced Search](#) [Search History](#)

Useful Links

Patron Functionality API

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

| Mar...  Spiceworks - Dashb...  Raynor Memorial Li...  Library Directory  Planner  Sierra  Library Info  Website

My MARQCAT Login

Marquette students, faculty, and staff: Use the top two boxes to enter your Marqnet/E-mail credentials.

Law Card Access Patrons: Please use the bottom two boxes to enter your information.

Marqnet/E-Mail Login:

Marqnet/E-Mail Password:

14-digit Barcode:

First and Last Name:

LOGIN



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Patron Functionality API

The screenshot shows the Marquette University library website. The browser address bar displays the URL: <https://eds.a.ebscohost.com/eds/search/basic?vid=1&sid=cf590a80-1d90-44b4-b92e-67d82b41584f%40sdc-v-sessmgr02>. The top navigation bar includes links for New search, Library catalog, Research guides, Research databases, Publications, Main Library, Law Library, Folder, Ask A Librarian, and Help. The Marquette University logo is visible on the left. A search bar with the placeholder text "Enter any words" is present. A red box highlights the "My Checkouts (4)" link in the top right corner, with an arrow pointing to a detailed view of the checkout section. This detailed view shows the title "My Checkouts (4)" and a list of items with columns for Folder, Ask A Librarian, and Help.

My Checkouts (4)

Keyword

Search Options ▸ Basic Search Advanced Search

Useful Links

My Checkouts (4)

Folder Ask A Librarian Help

Patron Functionality API

MARQCAT
plus

Folder Contents
[Back](#)

To store these items in the folder for a future session, [Sign In to My EBSCOhost](#).

Articles (0)
Images (0)
Videos (0)
Companies (0)
eBooks (0)
audioBooks (0)
Checkouts (4)
Holds (0)
Fees (0)
Notes (0)
Other Content Sources (0)
Persistent Links to Searches (0)
Saved Searches (0)
Search Alerts (0)
Journal Alerts (0)


Checkouts


1-4 of 4

Page: 1

Due Date ▾ Page Options ▾

☐ Select / deselect all

☐ 1. [Emotions, technology, and design / edited by Sharon Y. Tettegah, Safiya Umoja Noble.](#) 




Book

01/01/2016 xix, 247 pages : illustrations ; 23 cm. Language: English, Database: MARQCATplus

Subjects: Human-computer interaction; Technology -- Social aspects; Technology -- Psychological aspects; Educational innovations; Emotions

[Find it @ MU](#)

 [My Checkout](#) Due Date: 08/17/2019 [Renew](#) [Place Hold](#)

Location	Call No.	Status
MEMORIAL LEVEL 5	QA76.9.H85 E495 2016	DUE 08-17-19



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Phoenix, AZ

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.



Book

By: Dougherty, Richard M.. Lanham, Md. : Scarecrow Press, 2008. xviii, 269 p. : ill. ; 26 cm. Language: English, Database: MARQCATplus

Subjects: Library administration

Find it @ MU



Place Hold

Location	Call No.	Status
MEMORIAL LEVEL 5	Z678 .D6 2008	AVAILABLE

Map It

[Request It](#)



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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):

Submit

Cancel

Hold Confirmation

✓ The hold was successfully placed.



Book

xxvi, 446 pages : illustrations ; 26 cm. Language: English, Database: MA

Subjects: Libraries -- United States -- Evaluation; Public services (Libraries) -- Evaluation; Public services (Libraries) -- Evaluation

Find it @ MU



My Hold Place in line: 1 Hold Starts: 04/03/2019 [Remove](#)

Location

MEMORIAL LEVEL 5

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
 - Ill 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



