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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

IUG2019 Phoenix, AZ

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

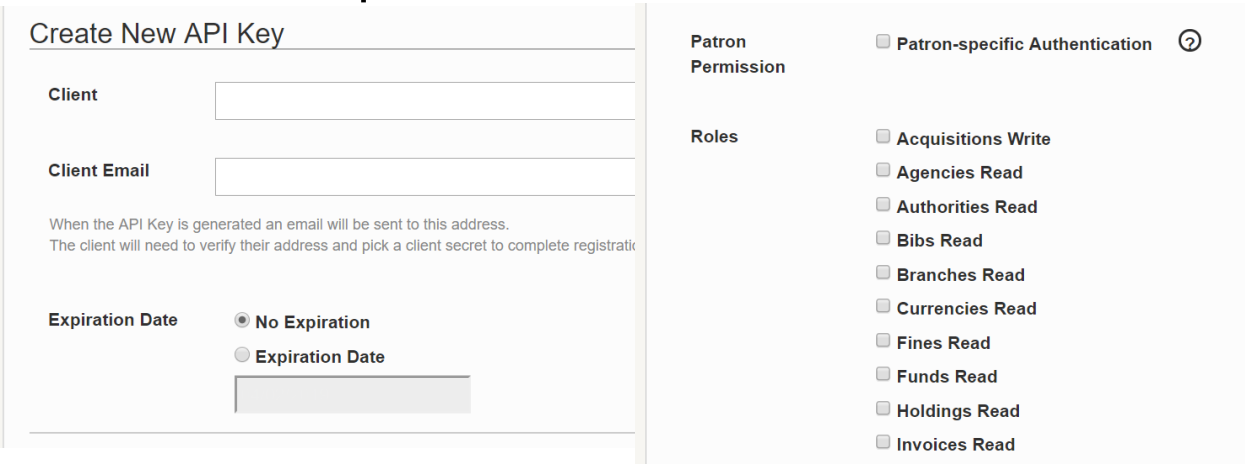
- EDS Harvesting API
  - Harvests our catalog into EDS
    - Take over weekly manual process

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 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

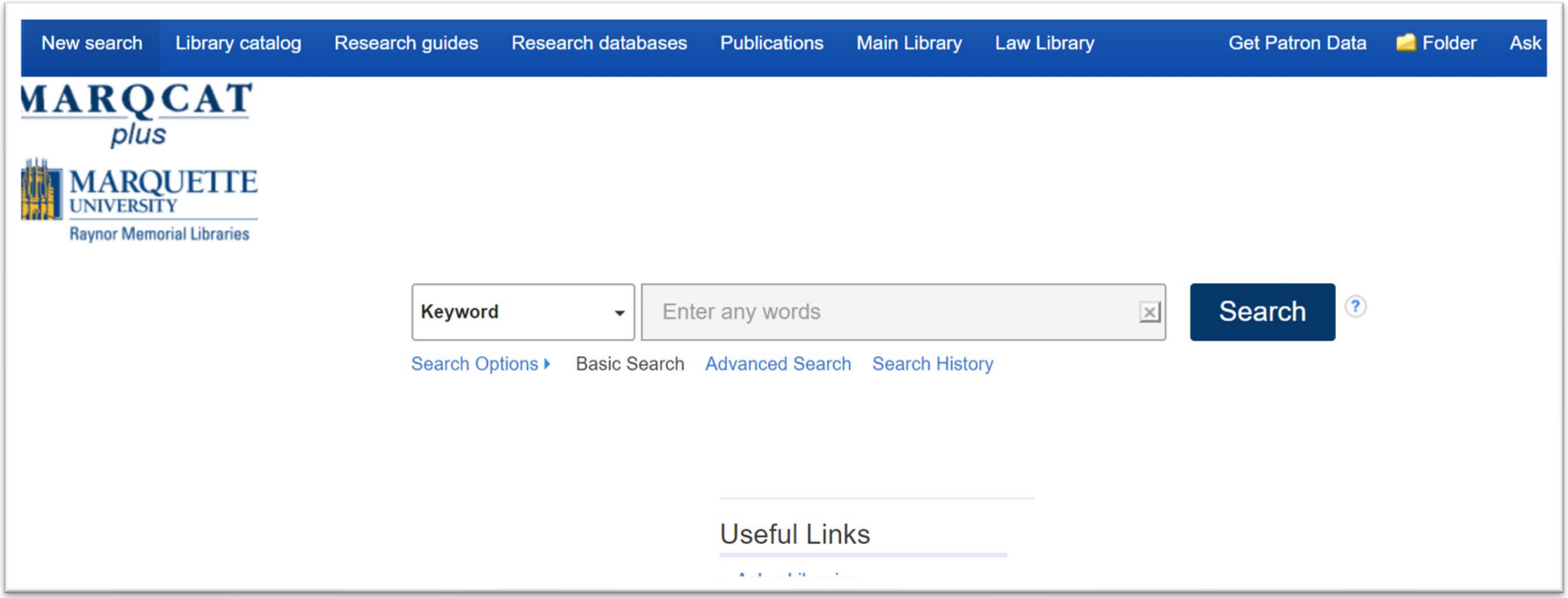
- Second roadblock
  - API only worked with Title-level holds
  - We had Item-level holds

Patron Functionality API

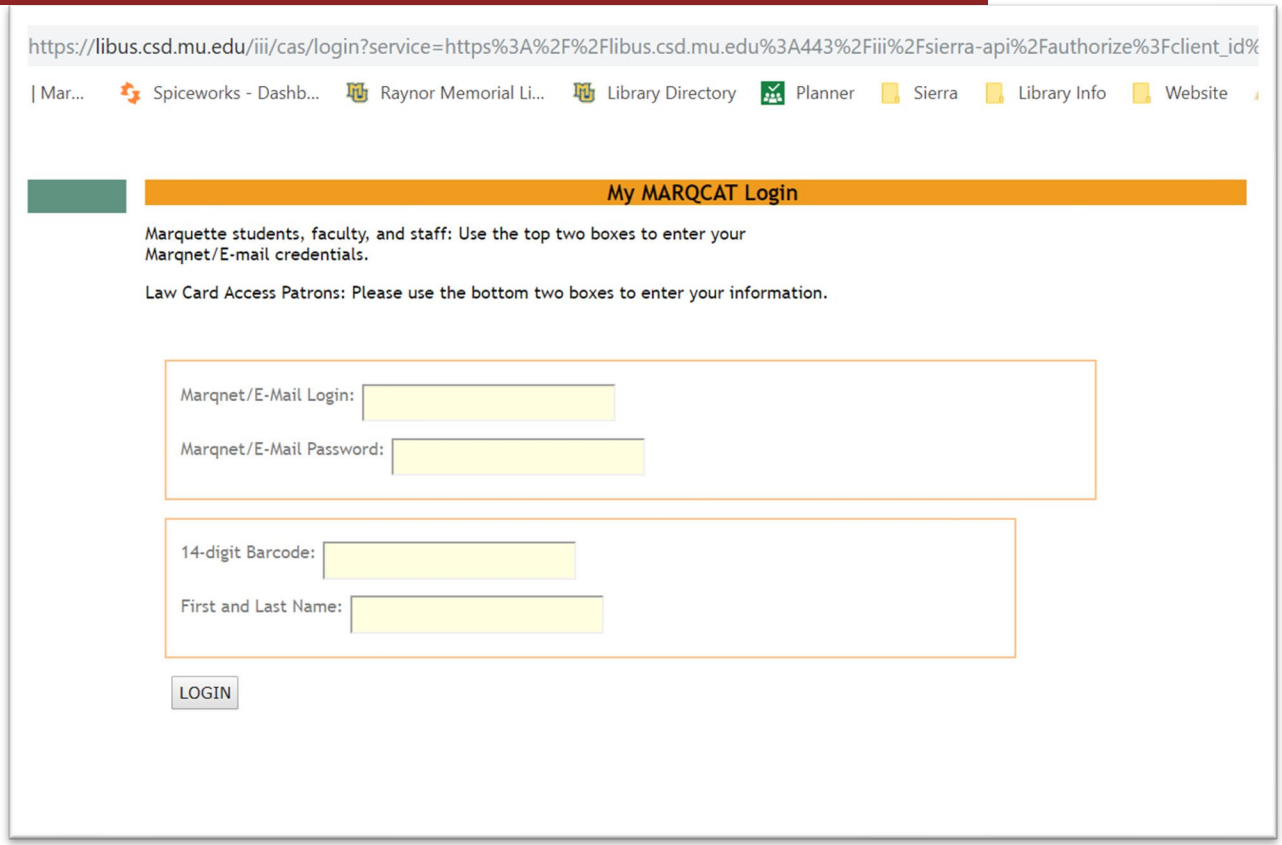
- Largest part of the project – switching from Item-level to Title-level holds
  - Had to coordinate main library and Law library
    - Law library had not done holds before
  - Had to coordinate with semester schedule
  - Actual work to change = very easy
  - Work involved to make sure everything works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

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

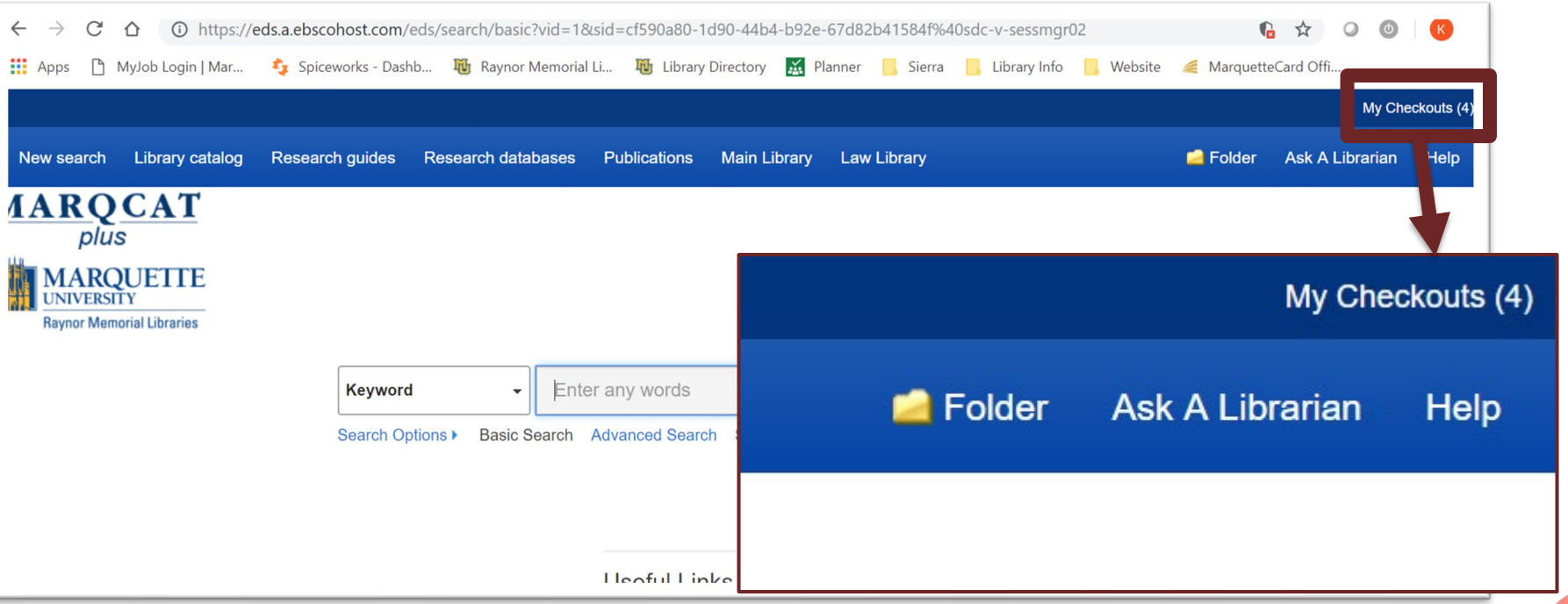
Patron Functionality API



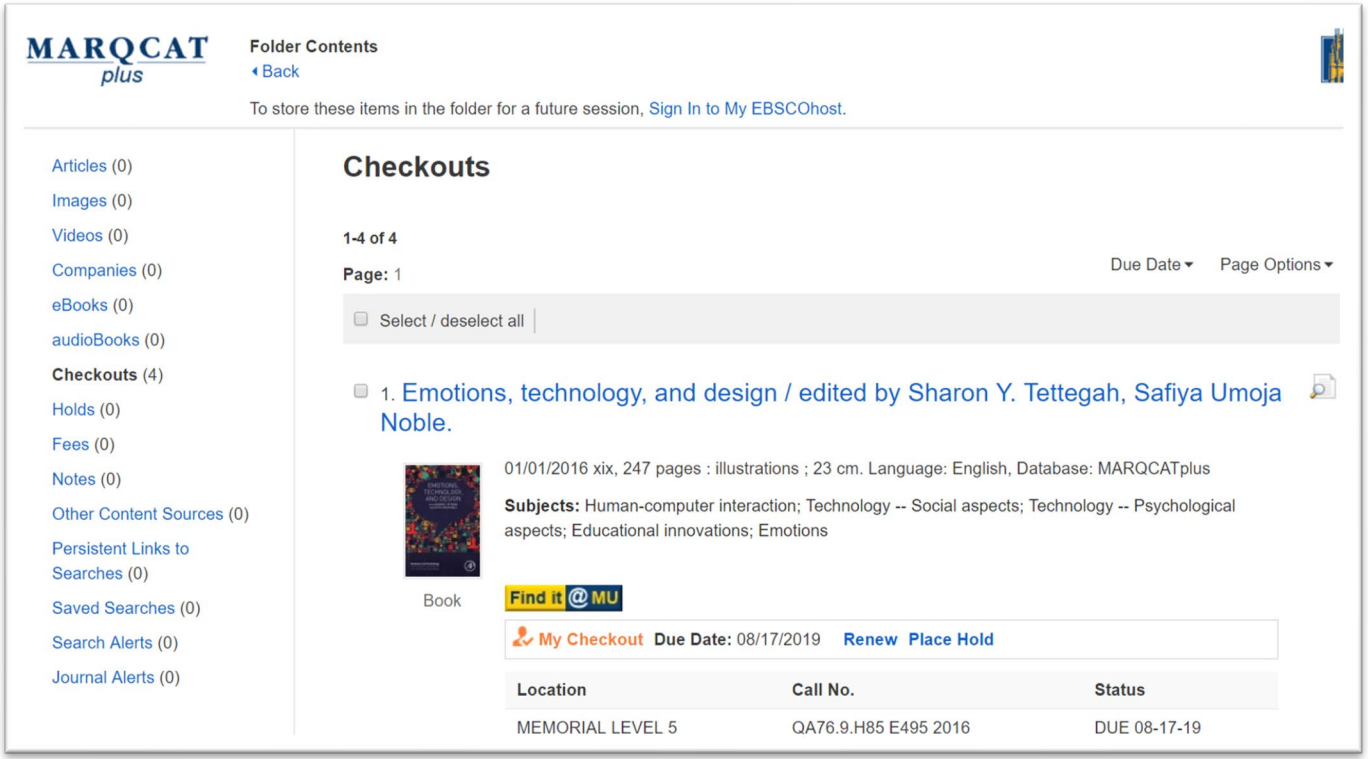
Patron Functionality API



Patron Functionality API



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.

Book

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

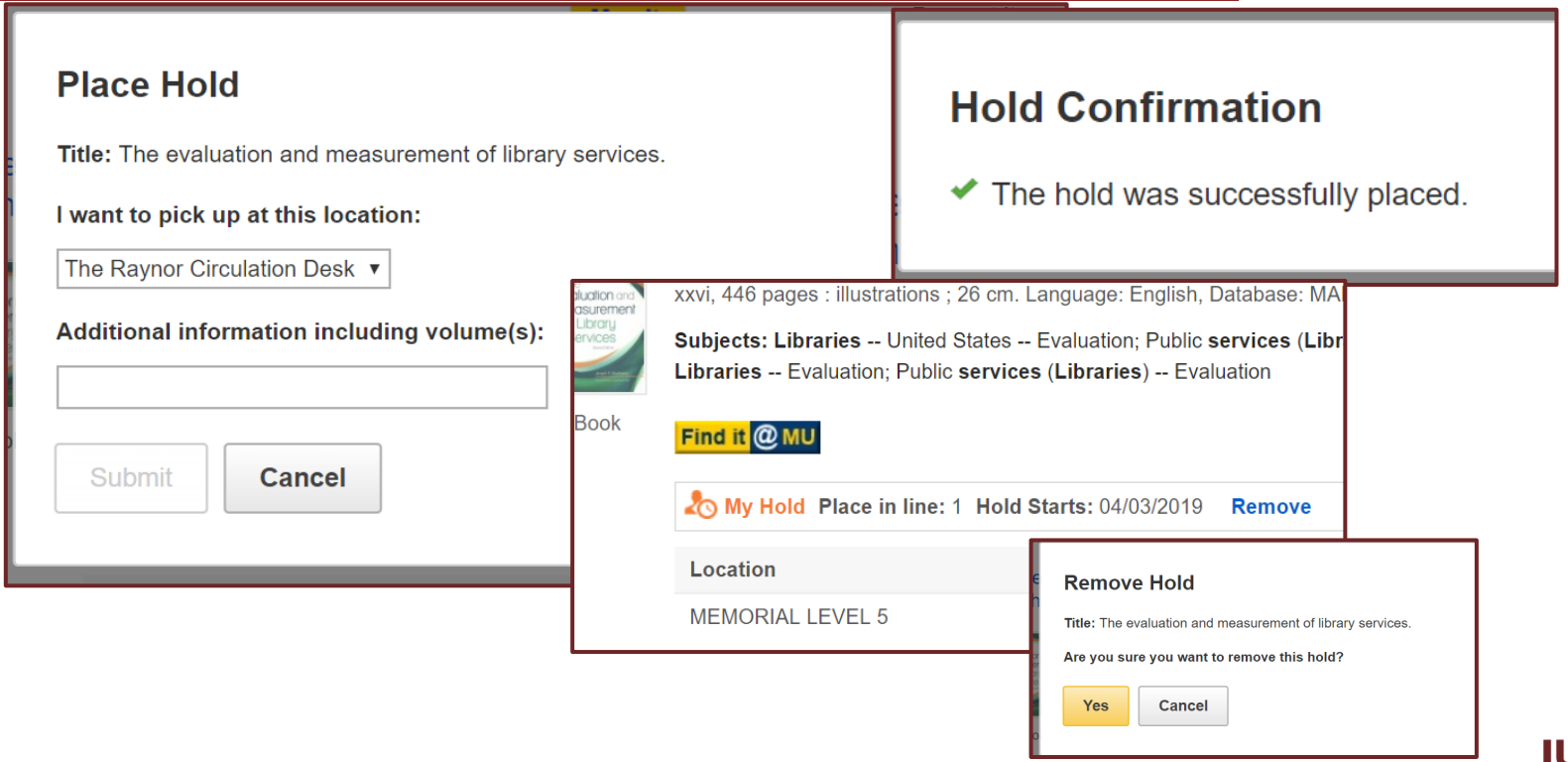
Subjects: Library administration

Find it @ MU

Place Hold

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

Patron Functionality API



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