

How to create a general electronic service to search by author name in VIAF

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Agenda

- Introduction
- Identify the technical name of the field we will search
- Identify the syntax needed to search a name in VIAF
- Create a new General Electronic Service
- Testing the new General Electronic Service

Introduction

Introduction

- In addition to this presentation, you may wish to also see the Ex Libris Developers Network blog [How to create a general electronic service to search by author name in VIAF](#)
- In this presentation we will show how to create a general electronic service to search by author name in VIAF. This will enable the end user in Primo to click a link and automatically search VIAF for the author of the record to which he or she has navigated in Primo.
- The same flow used here for VIAF and author can be used for other sources (other than VIAF) and other bibliographic fields.

Identify the technical name of the field we will search

Identify the technical name of the field we will search

- Identify the name of the author field as it appears in the Context Object and can therefore be used in the URL template of the General Electronic Service.
- See [How to identify the field name syntax for an Open URL Template in a General Electronic Service](#) for details of how to identify the field name.
- The name of the field we will use for searching is "rft.au".

Identify the technical name of the field we will search

- We are now in Primo VE looking at record "Gloria Steinem : feminist extraordinaire / by Caroline Lazo"



The screenshot shows a Primo VE record page for the book "Gloria Steinem : feminist extraordinaire" by Caroline Lazo. The page includes a book cover image, the title, author, and publication year (c1998). It also displays the availability status: "Available at Main Library Open Stacks (General) (HQ1413.S675 L39 1998)". Below the title, there is a "Send to" section with various sharing and export options, including Reading List, QR, Share, Export to Excel, EasyBib, Citation, Mendeley, Export BibTeX, Export RIS, Endnote, Repworks, Print, Permalink, and Email. The page is organized into sections: TOP, SEND TO, GET IT, DETAILS, TAGS, and VIRTUAL BROWSE.

Identify the technical name of the field we will search

- The URL is
https://exldeveu00.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma99133011000121&context=U&vid=EXLDEV1_INST:Alma&lang=en
- We change the URL to
https://exldeveu00.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma99133011000121&context=U&vid=EXLDEV1_INST:Alma&lang=en&displayCTO=true

Identify the technical name of the field we will search

- Now we have a button "Display CTO" (CTO is the Context Object) and it will show us what the technical field name for author is

BOOK
Gloria Steinem : feminist extraordinaire
Lazo, Caroline Evensen.
c1998

Available at Main Library Open Stacks (General) (HQ1413.S675 L39 1998) >

DISPLAY CTO

TOP
SEND TO
GET IT
DETAILS
TAGS
VIRTUAL BROWSE
LINKS


Send to

READING LIST QR SHARE EXPORT TO EXCEL EASYBIB CITATION MENDELEY EXPORT BIBTEX EXPORT RIS ENDNOTE

REFWORKS PRINT PERMLINK EMAIL

Identify the technical name of the field we will search

- The name of the field we will use for searching is "rft.au".



```
<u:key id="memberProxyType">EZProxy</u:key>  
<u:key id="rft.publisher">Lerner Publications.</u:key>  
<u:key id="rft.au">Lazo, Caroline Evensen.</u:key>  
<u:key id="rft.pubdate">c1998.</u:key>  
<u:key id="u.ignore_date_coverage">>true</u:key>  
<u:key id="rft.title">Gloria Steinem : feminist extraordinaire /</u:key>  
<u:key id="rft.lccn">97016831</u:key>
```

Identify the syntax needed to search a name in VIAF

Identify the syntax needed to search a name in VIAF

- Now we need to identify the syntax needed to search a name in VIAF.
- We can do this by going to the VIAF Virtual International Authority File at <https://viaf.org/> and searching for a heading of type name.
- We are searching for “Woolf, Virginia”

Search

Select Field: Select Index: Search Terms:

Search




Identify the syntax needed to search a name in VIAF

- We have results

Search

Select Field: Select Index: Search Terms:

1 heading found for *Woolf, Virginia*

	Heading	Type	Sample Title
1	Woolf, Virginia, 1882-1941.  Woolf, Virginia  Woolf, Virginia (Adeline Virginia Stephen), 1882-1941 	Personal	Between tha Acts Between the acts Between the acts

Identify the syntax needed to search a name in VIAF

- The URL is as follows. This is the syntax we need to search a name in VIAF.

```
https://viaf.org/viaf/search?query=local.names%20exact%20%22Woolf%2C%20Virginia%22&sortKeys=holdingscount&recordSchema=BriefVIAF
```

We will need to replace this hard coded name with the rft.au that we got from the Context Object

- This means that in the URL template we can put:

```
https://viaf.org/viaf/search?query=local.names%20exact%20%22{rft.au}%22&sortKeys=holdingscount&recordSchema=BriefVIAF
```

Create a new General Electronic Service

Create a new General Electronic Service

- Create a new General Electronic Service as follows:
 1. Navigate to "Configuration > Fulfillment > Discovery Interface Display Logic > General Electronic Services"
 2. Click "Add Service"
 3. Stay in "Service Details" tab

Create a new General Electronic Service

4. Fill in as follows:

- Service name = Search Author in VIAF (or whatever you think is appropriate)
- Public name = Search for the author in VIAF (or whatever you think is appropriate)
- Is this a Document Delivery/ILL service? = Yes
 - We will discuss this parameter more later. Suffice to say for now:
 - No = the link will display on the bottom in the "links"
 - Yes = the link will display on the top under "Get It" or "View Online"
- Display location = Getit, viewit & How To Getit
- URL template =
`https://viaf.org/viaf/search?query=local.names%20exact%20%22{rft.au}%22&sortKeys=holdingscount&recordSchema=BriefVIAF`
 - This is the URL template we made above by looking at
 - [How to identify the field name syntax for an Open URL Template in a General Electronic Service](#) to know we need "rft.au" for the field name
 - Searching the [VIAF Virtual International Authority File](#) to get the URL syntax
- Enable without login = Yes

Create a new General Electronic Service

- Discovery Interface Display Logic
- Display Logic Rules
- Related Records
- Direct Linking
- General Electronic Services**
- General Electronic Services Bib Fields Enrichment
- Viewer Services
- Online Services Order
- General Electronic Services Order
- Locations Ordering Profile
- Other Settings
- Currency Symbols

General Electronic Services

Institution **Community**

Name ▾



+ Add Service



Create a new General Electronic Service

Add Service

Service Code *

Service Name *

Service Description

Public Name

Public Note

Is this a Document Delivery/ILL service? Yes No

Display Location *

URL Template *

This is the URL template we earlier got by search VIAF and getting the rft.au field from the Context Object



Create a new General Electronic Service

Service Details Cancel Save

Service Details | **Service Availability Rules**

Active:

Service Code *

Service Name *

Service Description:

Public Name:

Public Note:

Is this a Document Delivery/ILL service? Yes No

Display Location *

URL Template *

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

Note that some parameters such as "Enable without login" and "Disable service" are not present when first creating the General Electronic Service but do appear after it is created and edited.

Create a new General Electronic Service

- Now we will edit the General Electronic Service and make a “Service Availability Rule” to determine when the service will appear.
- We will make a rule to state “If the “rft.au” field exists then make the General Electronic Service appear”.
- Switch to the “Service Availability Rules” tab and click “Add rule”
- Give the rule name “If record has rft.au then display” (or whatever you think is appropriate)
- Click “Add Parameter” and define that rft.au is not empty

Create a new General Electronic Service

Service Availability Rules Cancel Save

Service Details Service Availability Rules

+ Add Rule

Filter : All

No records were found.

Default Rule

Rule Name	Description	Updated By	Update Date	
1 Default general electronic services rule	Default general electronic services rule	Alicia Chen	10/04/2024	...

Create a new General Electronic Service

< Edit rule Cancel Save

Edit rule

Name * Save the rule

Description

Created By Alicia Chen Created On 10/04/2024

Updated By Alicia Chen Updated On 10/04/2024

Input Parameters + Add Parameter

Name	Operator	Value
1 rft.au	Is Not Empty	

Output Parameters

IsDisplay *

"True" means "Display the general Electronic Service"

Create a new General Electronic Service

- Note that the default rule is to not display. This means it will first check the above rule "If record has rft.au then display". If that rule fails, then it will go to the default. Here we check the default rule:

Default Rule

Rule Name	Description	Updated By	Update Date
1 Default general electronic services rule	Default general electronic services rule	Alicia Chen	10/04/2024

Edit

Output Parameters

IsDisplay * False

The default rule states to not display the General Electronic Service.

Testing the new General Electronic Service

Testing the new General Electronic Service

- Now we will test the new General Electronic Service.
- Search for something in Primo and click “Available at” or “Available Online”.
- This record has author “Marcello, Patricia Cronin”



1

BOOK

Gloria Steinem : a biography

Marcello, Patricia Cronin.

2004

[Available Online >](#)

We will click “Available Online”

Testing the new General Electronic Service

- In the ViewIt we see the link for the General Electronic Service

View Online

Full text availability

ABC-CLIO eBooks	↗
Search for the author in VIAF	↗

Details

Title	Gloria Steinem : a biography
Creator	Marcello, Patricia Cronin. >
Subject	Steinem, Gloria > Feminists -- United States >

We will click "Search for the Author in VIAF"

Testing the new General Electronic Service









- The link goes to <https://viaf.org/viaf/search?query=local.names%20exact%20%22Marcello%2C+Patricia+Cronin.%22&sortKeys=holdingscount&recordSchema=BriefVIAF> and appears as follows:

VIAF
Virtual International Authority File

Search

Select Field: Select Index: Search Terms:

1 heading found for *Marcello, Patricia Cronin.*

Heading	Type	Sample Title
1 Marcello, Patricia Cronin    Marcello, Patricia Cronin 1952-....     Patricia Cronin Marcello 	Personal	Dala Lama zhuan Dalai lama - a biography

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