Version 1
10/4/2023

Springshare LibGuides A-Z List + Primo VE Integration

Instructions for importing the A-Z List only into Primo VE

Process

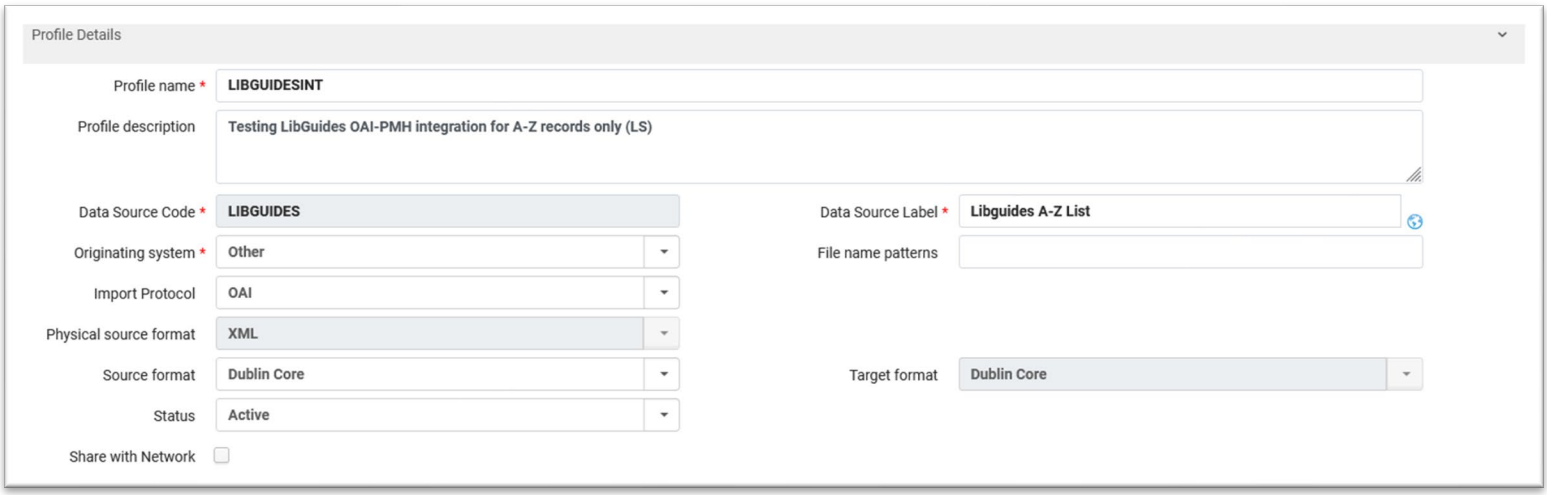
Find Springshare Information

1. Log in to Libguides and navigate to *Tools > Data Imports* and select the *OAI-PMH* tab. Copy the base URL for use in the Discovery Import profile. This Springshare article includes screenshots of where to find this information.

Create Discovery Import Profile

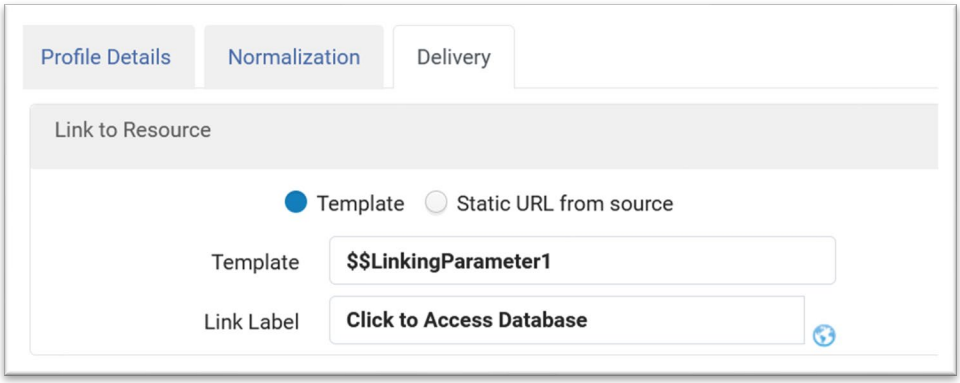
In Alma, go to *Configuration > Discovery > Loading External Data Sources > Discovery Import Profiles*

1. Click “Add New Profile”
2. Choose profile type “Discovery”
3. Fill out the following fields:
    a. Profile name: Whatever you want (this is not public); we use LIBGUIDESINT
    b. Profile description: Optional
    c. Data Source Code: This isn’t public; ours is LIBGUIDES
    d. Data Source Label: This is what your users will see as the record source in Primo VE. Ours is Libguides A-Z List
    e. Originating system: Other
    f. File name patterns: Leave blank
    g. Import Protocol: OAI
    h. Physical source format: XML
    i. Source format: Dublin Core
    j. Target format: Dublin Core
    k. Status: Active
    l. Share with Network: Uncheck

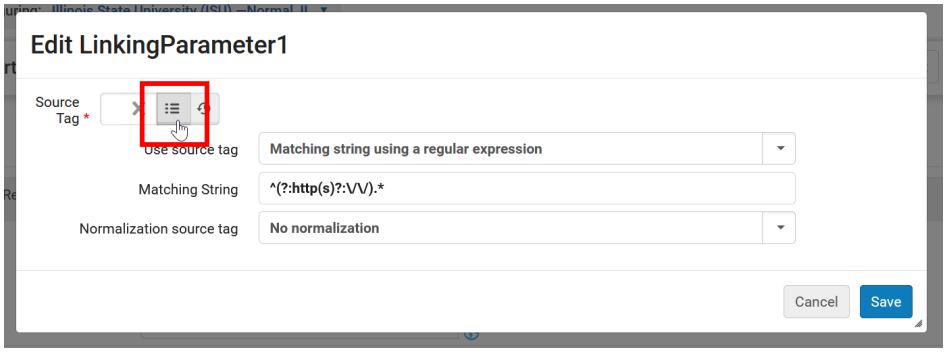


4. Skip the “Scheduling” section. **We will come back to this later.**

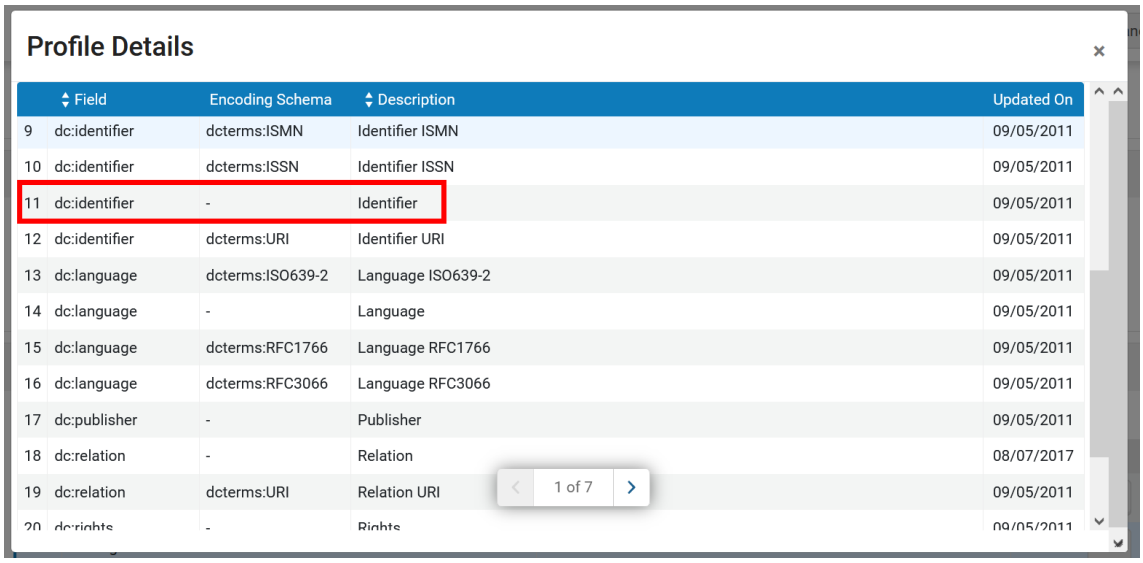
5. Add your OAI base URL that you saved earlier and select “Connect and Edit.” This will populate the other fields.
6. Change your Set to *az(az).* **This will only harvest the Database A-Z List**.
7. Test your connection to ensure it is working.
8. Hit Next.
9. Skip the “Normalize the data using ____” page and click Next. **We will come back to this later.**
10. In the *Link to Resource* section, fill out the following fields:
    a. Select the “Template” radio button
    b. Template: $$LinkingParameter1
    c. Link Label: This is what the text for the links patrons will see in Primo VE. Ours is “Click to Access Database”



11. Scroll down to the *Linking Parameters* section of the page.
    a. Next to “LinkingParameter1,” select the “…” Edit option. This will open an “Edit LinkingParameter1” editor.
    b. Next to the “Source Tag” option, select the “Options” icon:



    c. Select dc:identifier with no encoding schema as the linking parameter:



d. In "Use Source tag," select: "Matching string using a regular expression"
e. For "Matching string," enter: ^(?:http(s)?:\/\/).*
    i. This is telling the system to use the "identifier" tag with a URL in it as the database link
f. For "Normalization source tag," chose "No normalization."
g. Hit Save and Next.
h. From here, if you run your Import Profile, you'll load all the Database records, but they will not be normalized and they will automatically be added to your "Library Catalog" search profile. Before proceeding, add normalization rules.

Create Normalization Rules

Go to *Configuration > Discovery > Loading External Data Sources > Normalization Rules for External Data Sources*. This will open the Metadata Editor (alternatively, you can go directly to the editor and select the "Rules" tab and the "Normalization (Discovery)" subtab.

1. First, check your settings. Go to *New > Placement Options*. Make sure the "Placement of new rules" is set to "Local."
2. Create a new normalization rule via *New > Normalization (Discovery)*
3. Call your rule whatever you want; ours is "ISU Libguides AZ Normalization Rules" since you can have multiple "rules" in one "new rule"
    a. Type: DC
    b. Access Level: Shared – if you select private, you won't be able to use your normalization rule in the normalization process task.
4. Add the following rules, as desired:
    a. Set the resource type to database:

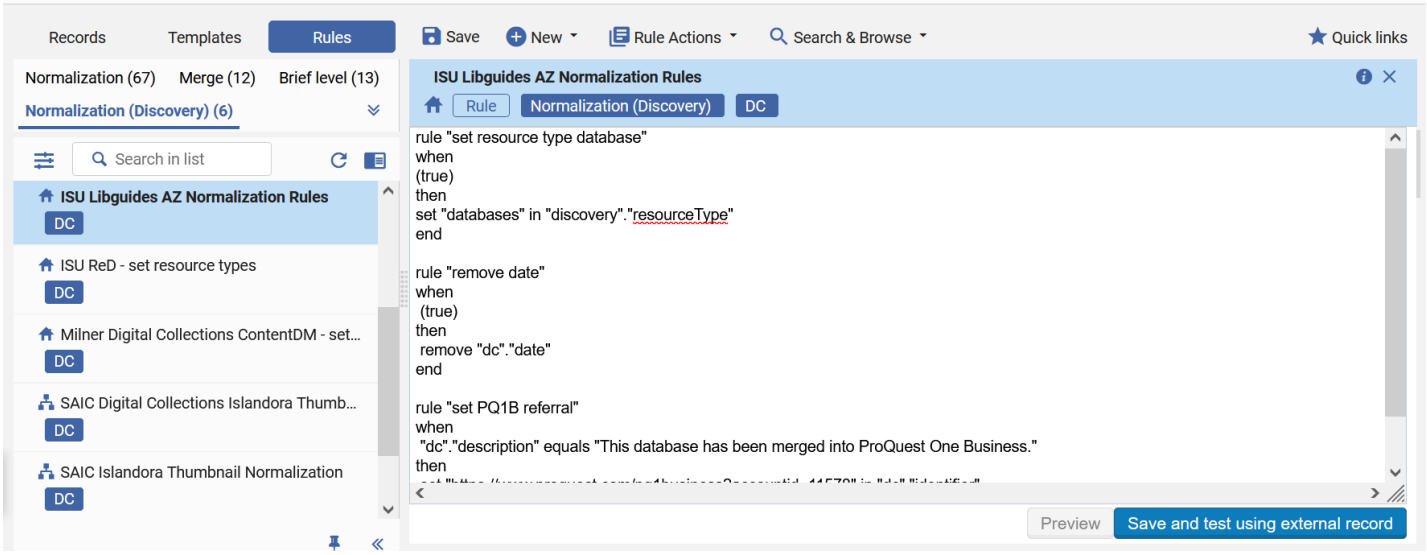
```
rule "set resource type database"
when
    (true)
then
    set "databases" in "discovery"."resourceType"
```

```
end
```

b. Remove the date (this is the “created date” in Springshare but will display as a “publication date” in Primo VE if you do not remove it)

```
rule "remove date"
when
    (true)
then
    Remove "dc"."date"
end
```

c. Add other rules you may need, depending on your data.



Create the Normalization Process Task

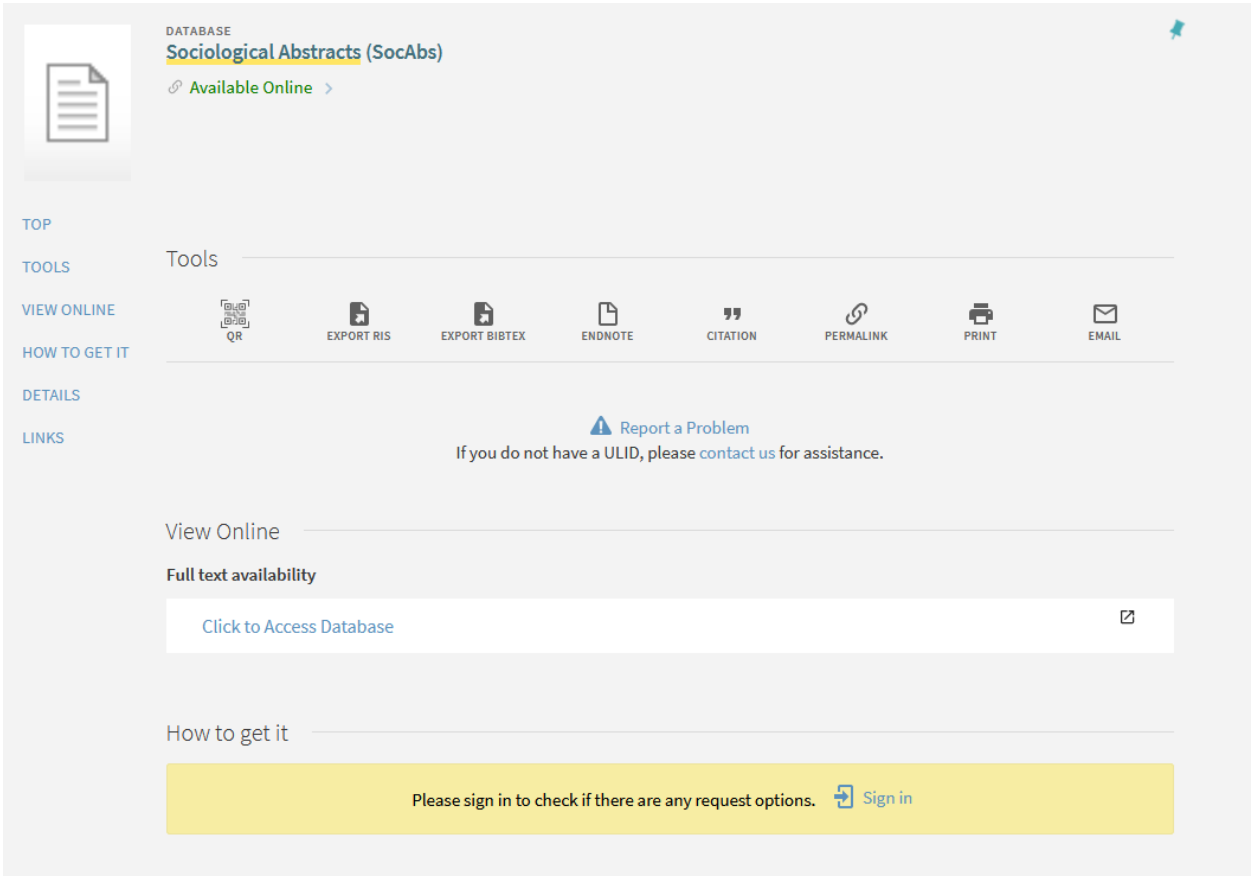
Go to *Configuration > Discovery > Loading External Data Sources > Normalization Process Task*

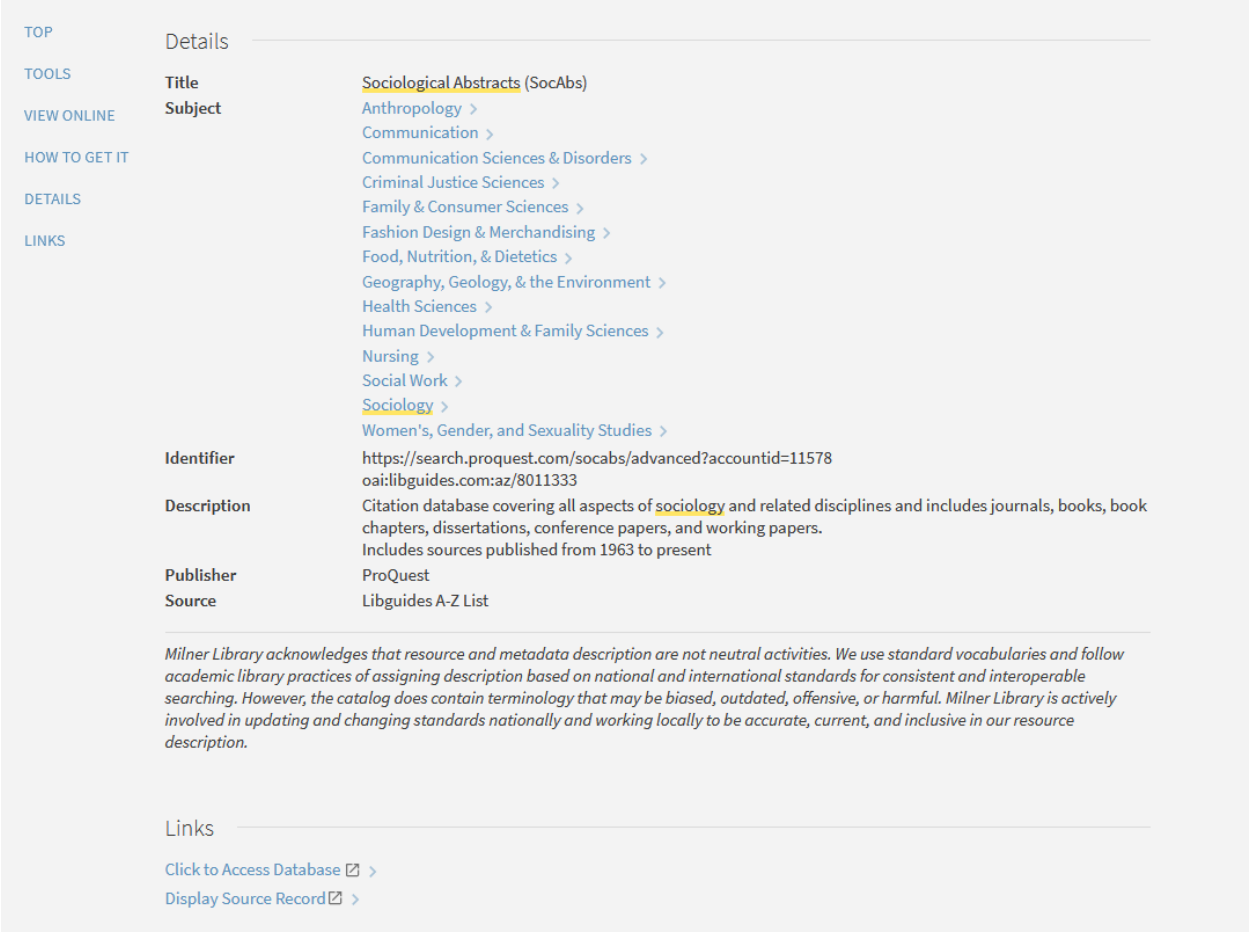
1. Select “Add Process”
2. For “Business Entity,” select “Discovery BIB records”
3. For “Type,” select “Discovery DC normalization”
4. Hit Next.
5. Add a Name and Description of your choosing. These are not public. Our process is called DiscoveryLibguidesAZ.
6. Hit Next.
7. On the “Add Tasks” page, click the “Add Task” button. Select “DCImportDroolNormalization,” which is the only option. Select “Add and Close.”
8. Hit Next.
9. Select the normalization rule you created earlier. **If you do not see it, you likely saved your rule to the network instead of locally.** Hit Save.

Circle Back to the Discovery Import Profile

Go to *Configuration > Discovery > Loading External Data Sources > Discovery Import Profiles*

1. Edit your discovery import profile and go to the “Normalization” tab. Add the normalization process you just created and save.
2. Click the “Edit” menu and select “Run.” Loading the Springshare records usually only takes about a minute and the records will immediately display in the “Library Catalog” search profile, though Ex Libris documentation advises that there could be a delay.
3. Check the records in Primo VE. Here’s an example in our instance:





4. If you're happy with the result, edit your import profile and **enable the scheduler** to run at the frequency of your choice. We run ours daily.

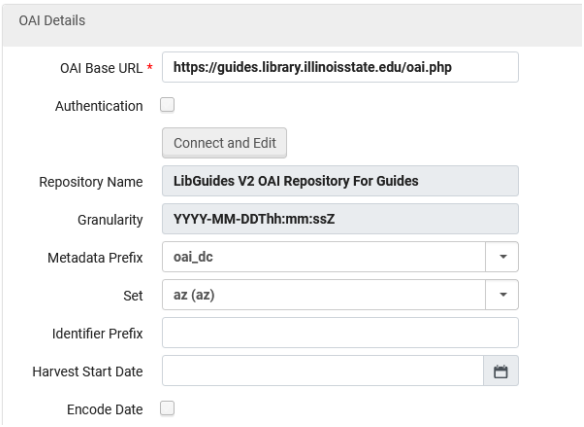
Helpful Notes

How to Remove All Records

If you aren't happy with the display and need to remove your records, go to *Admin > Manage Jobs and Sets > Run a Job*. Under "Type," filter to "Discovery management" and run the "Delete External Data Sources" job for your data source. This will remove all records. They will display in Primo VE as "Ghost Records" until the system catches up.

How to Remove Deleted Records

While the scheduled "refresh" process loads new A-Z List records, you must manually run a process to remove A-Z List records you've deleted in Libguides. To do so, go to *Configuration > Discovery > Loading External Data Sources > Discovery Import Profiles*. First, edit your Import Profile to remove the harvest start date (in OAI Details; you will have to click the "Connect and Edit" button to do so). This will refresh your entire record set and remove deleted Springshare records; otherwise, it will only load new records created since the last harvest date.



Save your change and then select the "…" menu next to the Import Profile. Select Reload and Delete.

Create a Search Scope and Profile Just for Databases

External records will automatically be added to your Library Catalog Search Profile. If you want it to have its own Search Profile, you can create a Search Scope by navigating to *Configuration > Discovery > Search Configuration > Search Profiles*. Navigate to "Custom Local Data Scopes" and select "Add a Custom Scope." Enter a Code and Name of your choice – this isn't displayed publicly. Then, select "Add a Condition." In the search index, choose "Inventory: External Data Source." Then choose the source you created from the "Value" dropdown.

Once you've created a Scope, move to the "Search Profiles" tab and "Add a Search Profile." Enter the code and display name of your choice. Then select "Add Scope" and add the Scope you just created.

Finally, to make it available to users, navigate to *Configuration > Discovery > Display Configuration > Configure Views*. Edit your view and create a new Search Profile slot on the "Search Profile Slots" tab. The new Search Profile Slot will be immediately available in your view and will limit users to searching Databases.

Other Normalization Rules Used at ISU

The use cases below are likely not useful exactly as written for other institutions, but show examples of other normalization rules:

1. Our A-Z List has "referring" (dummy) entries for the databases that now comprise ProQuest One Business. While the title links to the new database, they do not have their own URLs.

To handle these records, I use the following rule:

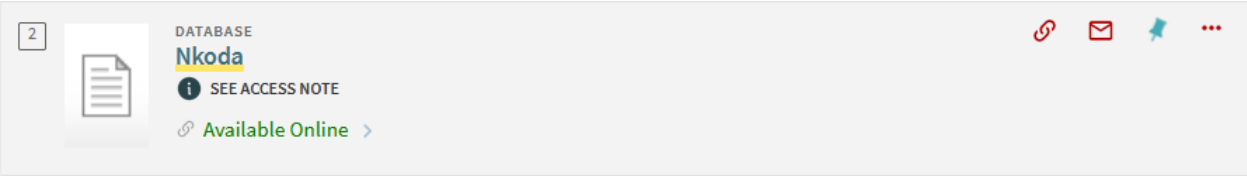
```
rule "PQ1B referral"
when
```

```
    "dc"."description" equals "This database has been merged into ProQuest
One Business."
then
    set "https://www.proquest.com/pq1business?accountid=11578" in
"dc"."identifier"
end
```

2. A couple of our databases have special access instructions. These must be handled individually. We wanted an indicator on the item record to alert users that there were special access instructions. To do this, I created a local field that would set the phrase "See Access Note" for specific records, which was then configured to display on the brief record. I also set a class so that I could style the field and add an image. (This was largely based on this Developer's Network article.)

```
rule "set Access Note Indicator NYT"
when
    "dc"."title" equals "New York Times (website)"
then
    set "<span class=\"accessNote\">See Access Note</span>" in
"discovery"."local44"
end
```

The CSS that accompanies this is:

```
.accessNote {
    background-image: url('https://i-share-
isu.primo.exlibrisgroup.com/discovery/custom/01CARLI_ISU-
CARLI_ISU/img/InfoIcon.png');
    background-repeat: no-repeat;
    background-size: 15px;
    padding-left: 20px;
        font-size: 12px;
        text-transform: uppercase;
        font-weight: 600;
}
```

Which results in: