

## 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

Profile Details

Profile name \* LIBGUIDESINT

Profile description Testing LibGuides OAI-PMH integration for A-Z records only (LS)

Data Source Code \* LIBGUIDES Data Source Label \* Libguides A-Z List

Originating system \* Other File name patterns

Import Protocol OAI

Physical source format XML Target format Dublin Core

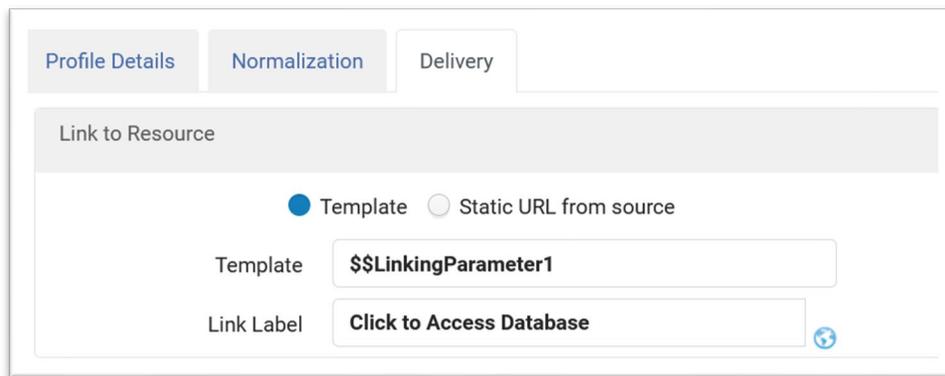
Source format Dublin Core

Status Active

Share with Network

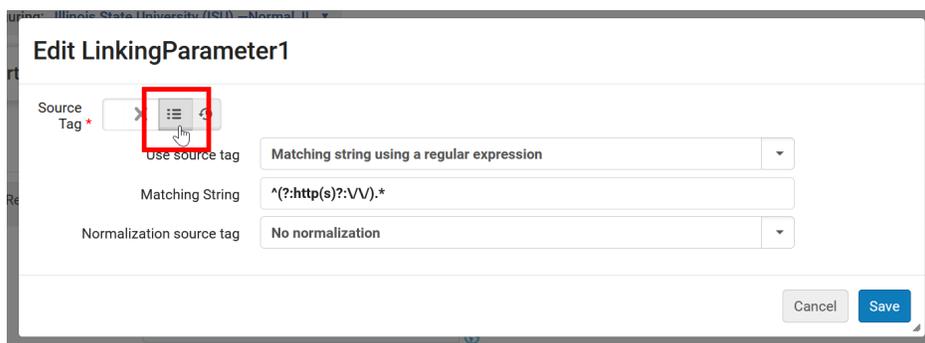
4. Skip the “Scheduling” section. **We will come back to this later.**

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”



The screenshot shows a web interface with three tabs: "Profile Details", "Normalization", and "Delivery". The "Link to Resource" section is active. It features two radio buttons: "Template" (selected) and "Static URL from source". Below the radio buttons are two input fields: "Template" containing the code "\$\$LinkingParameter1" and "Link Label" containing the text "Click to Access Database". A small globe icon is visible to the right of the Link Label field.

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:



The screenshot shows a dialog box titled "Edit LinkingParameter1". It has a "Source Tag" field with a dropdown arrow, a "Matching String" field containing the regular expression "^(?:http(s)?://).\*", and a "Normalization source tag" field with a dropdown arrow. A red box highlights the "Options" icon (three horizontal lines) next to the "Source Tag" field. At the bottom right, there are "Cancel" and "Save" buttons.

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

Field	Encoding Schema	Description	Updated On
9 dc:identifier	dcterms:ISMN	Identifier ISMN	09/05/2011
10 dc:identifier	dcterms:ISSN	Identifier ISSN	09/05/2011
11 dc:identifier	-	Identifier	09/05/2011
12 dc:identifier	dcterms:URI	Identifier URI	09/05/2011
13 dc:language	dcterms:ISO639-2	Language ISO639-2	09/05/2011
14 dc:language	-	Language	09/05/2011
15 dc:language	dcterms:RFC1766	Language RFC1766	09/05/2011
16 dc:language	dcterms:RFC3066	Language RFC3066	09/05/2011
17 dc:publisher	-	Publisher	09/05/2011
18 dc:relation	-	Relation	08/07/2017
19 dc:relation	dcterms:URI	Relation URI	09/05/2011
20 dc:rights	-	Rights	09/05/2011

- 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.

The screenshot displays the 'ISU Libguides AZ Normalization Rules' configuration page. On the left, a sidebar lists several rules, including 'ISU Libguides AZ Normalization Rules', 'ISU ReD - set resource types', 'Milner Digital Collections ContentDM - set...', 'SAIC Digital Collections Islandora Thumb...', and 'SAIC Islandora Thumbnail Normalization'. The main area shows the configuration for the 'remove date' rule, which is defined as follows:

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

## 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:

The screenshot displays the Primo VE interface for the **Sociological Abstracts (SocAbs)** database. At the top, it identifies the database and includes a link to [Available Online](#). A left-hand navigation menu contains links for **TOP**, **TOOLS**, **VIEW ONLINE**, **HOW TO GET IT**, **DETAILS**, and **LINKS**. The **TOOLS** section features icons for QR, EXPORT RIS, EXPORT BIBTEX, ENDNOTE, CITATION, PERMALINK, PRINT, and EMAIL. Below this, there is a **Report a Problem** link with a warning icon and the text: "If you do not have a ULID, please [contact us](#) for assistance." The **View Online** section includes a **Full text availability** section with a button labeled [Click to Access Database](#) and an external link icon. The **How to get it** section contains a yellow banner with the text: "Please sign in to check if there are any request options." followed by a [Sign in](#) button.

TOP Details

TOOLS

VIEW ONLINE

HOW TO GET IT

DETAILS

LINKS

**Title** [Sociological Abstracts \(SocAbs\)](#)

**Subject** [Anthropology >](#)  
[Communication >](#)  
[Communication Sciences & Disorders >](#)  
[Criminal Justice Sciences >](#)  
[Family & Consumer Sciences >](#)  
[Fashion Design & Merchandising >](#)  
[Food, Nutrition, & Dietetics >](#)  
[Geography, Geology, & the Environment >](#)  
[Health Sciences >](#)  
[Human Development & Family Sciences >](#)  
[Nursing >](#)  
[Social Work >](#)  
[Sociology >](#)  
[Women's, Gender, and Sexuality Studies >](#)

**Identifier** <https://search.proquest.com/socabs/advanced?accountid=11578>  
<oai:libguides.com:az/8011333>

**Description** Citation database covering all aspects of sociology and related disciplines and includes journals, books, book chapters, dissertations, conference papers, and working papers. Includes sources published from 1963 to present

**Publisher** ProQuest

**Source** Libguides A-Z List

*Milner Library acknowledges that resource and metadata description are not neutral activities. We use standard vocabularies and follow academic library practices of assigning description based on national and international standards for consistent and interoperable searching. However, the catalog does contain terminology that may be biased, outdated, offensive, or harmful. Milner Library is actively involved in updating and changing standards nationally and working locally to be accurate, current, and inclusive in our resource description.*

Links

[Click to Access Database](#) >

[Display Source Record](#) >

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.

OAI Details

OAI Base URL \*

Authentication

Repository Name

Granularity

Metadata Prefix

Set

Identifier Prefix

Harvest Start Date

Encode 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.

**ABI/INFORM Global (see [ProQuest One Business](#))**  
This database has been merged into ProQuest One Business.

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:

