



BACKING A NEW HORSE

A New Approach
to Harvesting
and Displaying
LibGuide
Content in Primo
VE

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IL PALIO

- Siena hosts two annual horse races in the Summer (Palio di Provenzano on July 2 and Palio dell'Assunta on August 16)
- Tradition goes back to 1633
- 10 riders representing the 17 city contrada race 3 laps around the Piazza del Campo
- Prize is the Palio (or Drappellone) – a hand-painted silk banner
- Known for being intense, high-risk, and thrilling



THE KENTUCKY DERBY

- First leg of the Triple Crown of Thoroughbred Racing, held annually on the first Saturday in May
- Tradition goes back to 1875
- Maximum of 20 horses race 10 furloughs (1 $\frac{1}{4}$ miles or 2,012 meters) at Churchill Downs in Louisville, Kentucky
- Prize is a \$5 million purse and a blanket of roses (“run for the roses”)
- Known for speed (“fastest two minutes in sports”) and style (derby hats and vibrant colors)



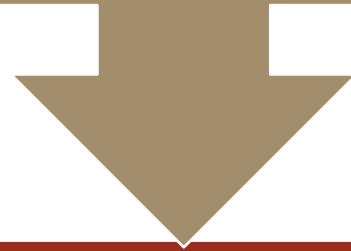


BACKGROUND

- Asked to import LibGuide content for display in Primo VE in 2022
- “[Adding Springshare Libguide Discovery to Primo VE](#)” (May 2018, Tech Blog)
- Questions from Springshare Committee:
 1. Can guides be differentiated on the Primo side (e.g. labelled as subject versus course guides)?
 2. Can databases be added and labeled as such?
 3. Will private and/or unpublished guides be loaded ? If so, can they be hidden?
 4. Can the date modified be displayed instead of the date created? If not, can the date be hidden?



Will private and/or unpublished guides be loaded? If so, can they be hidden?



Answer – It depends on its status at the time of load

If a guide is published – yes, but if it is unpublished after the record stays but the link goes nowhere

If a guide is unpublished at time of load – no, but if it is then published, the records would need to be reloaded

Profile Details

Profile name *	LibGuides
Profile description	Used to import LibGuides into Primo
Data Source Code *	LIBGUIDES
Originating system *	Other
Import Protocol	OAI
Physical source format	XML
Source format	Dublin Core
Status	Active

Data Source Label * LibGuides

File name patterns

Target format Dublin Core

Scheduling

Scheduler status Active Inactive

Scheduling Every 1 hour(s) [Edit Scheduling](#)

[Email Notifications](#)

OAI Details

OAI Base URL *	https://libguides.uky.edu/oai.php
Authentication	<input type="checkbox"/>
Connect and Edit	
Repository Name	LibGuides V2 OAI Repository For Research Guides
Granularity	YYYY-MM-DDTh:mm:ssZ
Metadata Prefix	oai_dc
Set	All Sets
Identifier Prefix	
Harvest Start Date	2009/06/18 19:07 X Open
Encode Date	<input type="checkbox"/>
Open Test Page	

Earliest Date Stamp 2009/06/18 19:07

Admin Email/s stacey@uky.edu

Harvest End Date

FIRST ATTEMPT

1. **Created Discovery Import Profile**
2. **Created Local Resource Types**
3. **Created Restricted Search Group rule**
4. **Created Normalization Rules**
5. **Created/applied normalization process**

1. Created Local Resource Type for Unpublished guides

Local Resource Types

1 - 5 of 5

[+ Add local Resource Type](#)



	Enabled	▲ Code	Display label	◆ Updated by	
1	<input checked="" type="checkbox"/>	LGAZ	Databases	jmg2021	
2	<input checked="" type="checkbox"/>	LGCG	Course Guides	jmg2021	
3	<input checked="" type="checkbox"/>	LGSG	Subject Guides	jmg2021	
4	<input checked="" type="checkbox"/>	LGUNPUB	Unpublished Guides	jmg2021	
5	<input checked="" type="checkbox"/>	NEWSISSUE	Newspaper Issues	jmgr235	

LOCAL RESOURCE TYPE



2. Created Restricted Search Group for unpublished guide

Restricted Search Group Definition

Cancel Save

Details						
Code *	UnpublishedLibGuides					
Name *	LibGuides Unpublished					
Description	Hides unpublished LibGuides					
Restricted Search Conditions						
Logic		Search Index	Operator	Value	Clear Conditions	...
1	-	External data source	Equals	LibGuides
2	And	Resource Type	Equals	Unpublished Guides

RESTRICTED SEARCH GROUP

3. Asked guide creators to edit custom metadata

Custom Metadata				
ID	Name	Value	Public?	Actions
321907	dc.coverage	Course Guides	<input checked="" type="checkbox"/>	Delete
Add Record		<i>Empty</i>		

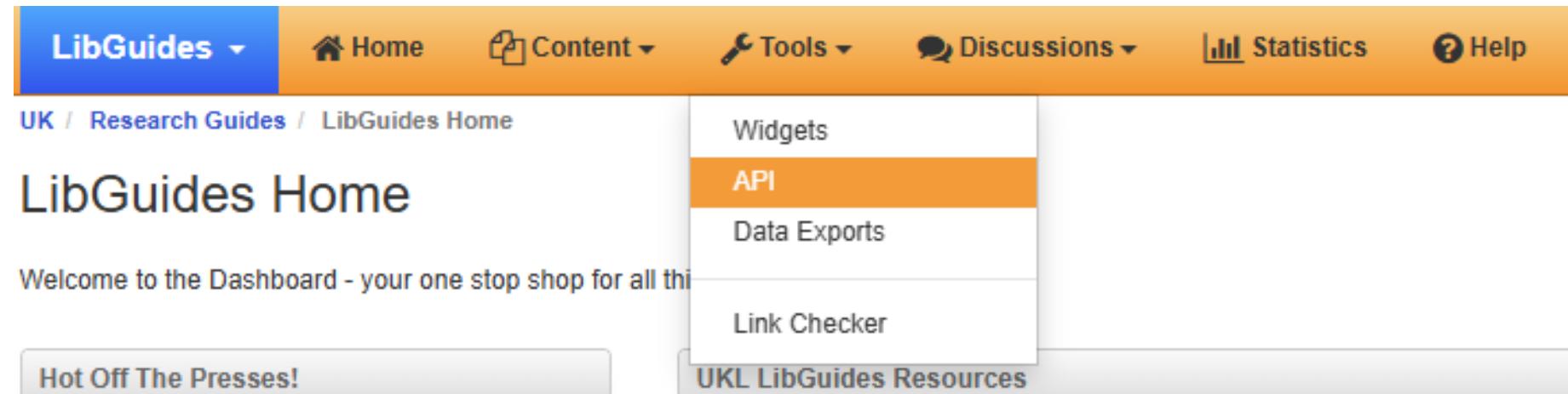
CUSTOM LIBGUIDE METADATA



It required manual work on the Alma side (loading and reloading records).

It required manual work on the SpringShare side (adding custom metadata and remembering to make changes to it when a guide status changed).

SPRINGSHARE APIS – OUR “DARK HORSE”



The screenshot shows the LibGuides Home dashboard. At the top, there is a navigation bar with links for LibGuides (selected), Home, Content, Tools, Discussions, Statistics, and Help. Below the navigation bar, the URL is shown as UK / Research Guides / LibGuides Home. The main content area is titled "LibGuides Home" and includes a "Welcome to the Dashboard - your one stop shop for all thi" message. A "Hot Off The Presses!" box is visible. On the right, a "Tools" menu is open, showing options: Widgets, API (which is highlighted in orange), Data Exports, and Link Checker. Below the tools menu, a "UKL LibGuides Resources" box is visible.

Guides Action	URL	Method	Details
Get Guides	/1.2/guides	GET	



Route Details



optional	numeric	Numeric - Multiple using array syntax, i.e. subject_ids[] = 1 & subject_ids[] = 2	
subjects_logic optional	String	and or	Logical operator to use for filtering by subject_ids.
tag_names optional	String	String - Comma-delimited list of tag names Numeric - Multiple names using array syntax, i.e. tag_names[] = Art & tag_names[] = Ecology	Filter by tag names.
tag_names_match optional	Numeric	1 - Exact match (default) 2 - Contains	Used in conjunction with tag_names.
status optional	String Numeric	String - Comma-delimited list of status ids Numeric - Multiple ids using array syntax, i.e. status[] = 1 & status[] = 2 0 - Unpublished 1 - Published 2 - Private 3 - Submit for Review	Filter by guide statuses (except when sort_by=relevance).
update_type optional	String	last - Return guides where the last updated date is in the last x days since - Return guides with a last updated date from this date onward	Filter based on when guides were last updated. Must be used in conjunction with last_update.
last_update optional	String	String - If update_type=since then this parameter should be a date (yyyy-mm-dd) Numeric - If update_type=last then this parameter should be a number	Used in conjunction with update_type.

OK



“STARTING FROM SCRATCH”

A script would perform an API call to Springshare to pull in the following elements:

- ID (unique identifier for guides)
- Name (display name in Primo)
- Description (description field in Primo)
- Status (differentiate between unpublished, published, and private guides)
- Guide_types (differentiate between subject and topic guides)
- Friendly_URL (custom URL we use to link out from Primo)
- Owner (owner first and last name)

Script converted JSON to XML

XML placed into SFTP directory



```
52 # Topic guides
53 if item['type_id'] == 3 or item['type_id'] == 4:
54
55     # common fields
56     xml += '<item>\n'
57     xml += '\t<id>' + str(item['id']) + '</id>\n'
58
59     # Some names/descriptions are coming through with &'s that cause XML load to fail. &amp; works... so, regex substitution...
60     name_xml = '\t<name>' + item['name'] + '</name>\n'
61     name_corrected = re.sub("& ", "&amp; ", name_xml)
62     xml += name_corrected
63
64     description_xml = '\t<description>' + item['description'] + '</description>\n'
65     description_corrected = re.sub("& ", "&amp; ", description_xml)
66     xml += description_corrected
67
68     # guides fields
69     if endpoint['path'] == 'guides':
70         if item['owner_id']:
71             xml += '\t<owner_id>' + str(item['owner_id']) + '</owner_id>\n'
72             xml += '\t<updated>' + item['updated'] + '</updated>\n'
73             xml += '\t<status_label>' + item['status_label'] + '</status_label>\n'
74             xml += '\t<type_label>' + item['type_label'] + '</type_label>\n'
75             xml += '\t<friendly_url>' + item['friendly_url'] + '</friendly_url>\n'
76             xml += '\t<url>' + item['url'] + '</url>\n'
77             if item['owner']:
78                 owner = item['owner']
79                 xml += '\t<owner>\n'
80                 xml += '\t\t<id>' + owner['id'] + '</id>\n'
81                 xml += '\t\t<first_name>' + owner['first_name'] + '</first_name>\n'
82                 xml += '\t\t<last_name>' + owner['last_name'] + '</last_name>\n'
83                 xml += '\t</owner>\n'
```

Profile Details

Profile name *	LibGuides
Profile description	Loads LibGuide content for discovery in Primo VE.
Data Source Code *	LIBGUIDES
Originating system *	Other
Import Protocol	FTP
Physical source format	XML
Source format	Generic XML
Status	Active

File splitter parameters

Root element tag *	guides
XPath to the identifier tag *	item/id
Delete record regular expression	

Scheduling

Files to import	<input checked="" type="radio"/> All <input type="radio"/> New
Scheduler status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Scheduling	Every 1 week(s) on Friday at 17:00 Edit Scheduling
Email Notifications	

FTP Information

<input checked="" type="radio"/> Select from Configured FTP <input type="radio"/> Other FTP Site	
S/FTP Connection Type *	UK_ilftp_srv
Input directory	LibGuides

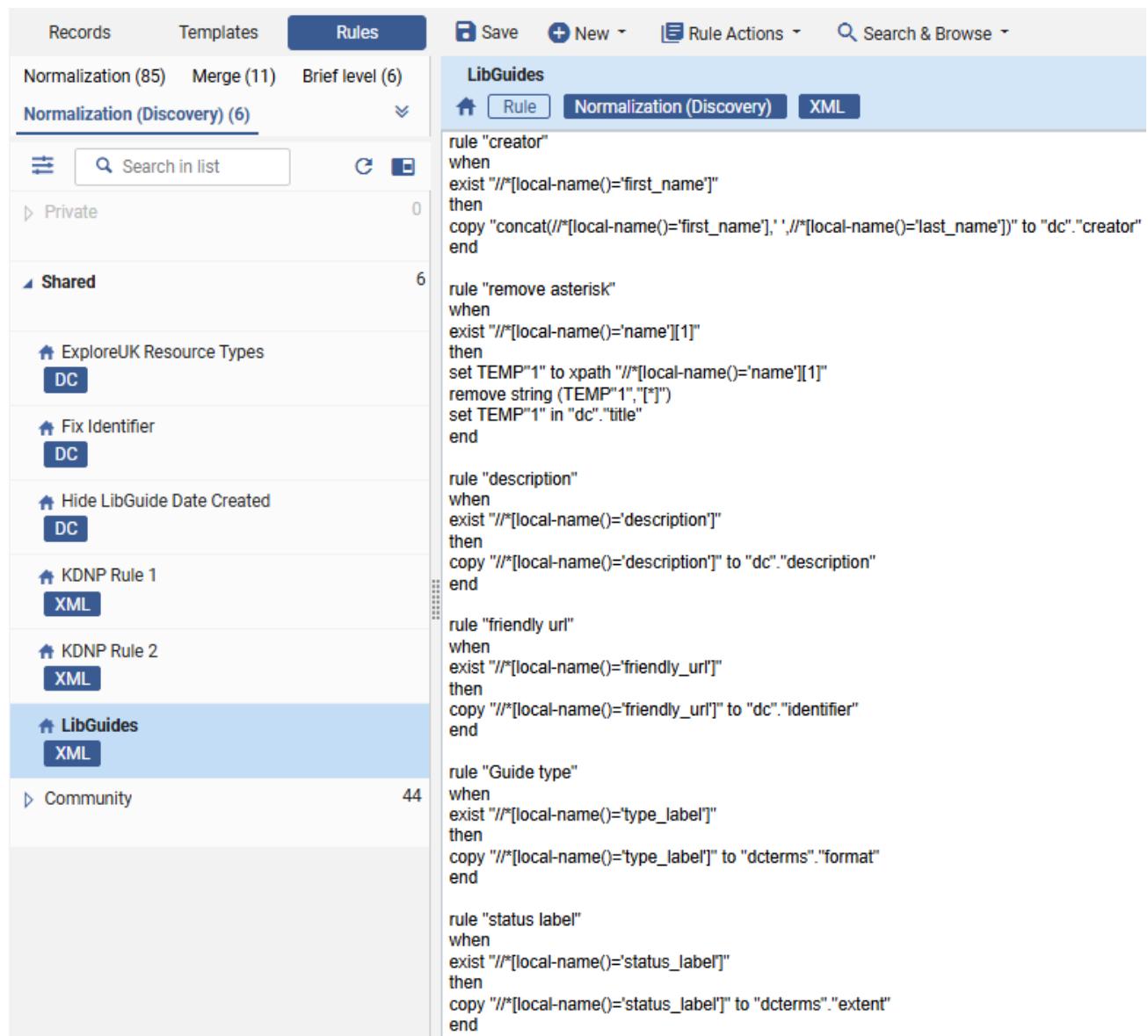
Record elements tag * **item**

XPath to the location of the deleted status

NEW PROCESS WORKFLOW IN ALMA

1. **Created a new import profile**

NEW PROCESS WORKFLOW IN ALMA



The screenshot shows the Alma Rules interface. The top navigation bar includes 'Records', 'Templates', 'Rules', 'Save', 'New', 'Rule Actions', and 'Search & Browse'. The 'Rules' tab is selected. The main area shows a list of rules categorized by source: 'Normalization (85)', 'Merge (11)', 'Brief level (6)', and 'Normalization (Discovery) (6)'. A 'LibGuides' rule is selected, showing its XML code:

```
rule "creator"
when
exist "//*[local-name()='first_name']"
then
copy "concat(//*[local-name()='first_name'], ' ',//*[local-name()='last_name'])" to "dc"."creator"
end

rule "remove asterisk"
when
exist "//*[local-name()='name'][1]"
then
set TEMP"1" to xpath "//*[local-name()='name'][1]"
remove string (TEMP"1","[1]")
set TEMP"1" in "dc"."title"
end

rule "description"
when
exist "//*[local-name()='description']"
then
copy "//*[local-name()='description']" to "dc"."description"
end

rule "friendly url"
when
exist "//*[local-name()='friendly_url']"
then
copy "//*[local-name()='friendly_url']" to "dc"."identifier"
end

rule "Guide type"
when
exist "//*[local-name()='type_label']"
then
copy "//*[local-name()='type_label]" to "dcterms"."format"
end

rule "status label"
when
exist "//*[local-name()='status_label']"
then
copy "//*[local-name()='status_label]" to "dcterms"."extent"
end
```

1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements

Process Details - General Information

General Information Task List Task Parameters

Name * LibGuides

Description * LibGuides

Status Active

Status Date -

Process Details - Add Tasks

General Information Task List Task Parameters

Name

Description

1

Generic XML- Normalization

Import generic XML Drool Normalization

Process Details - Task Parameters

General Information Task List Task Parameters

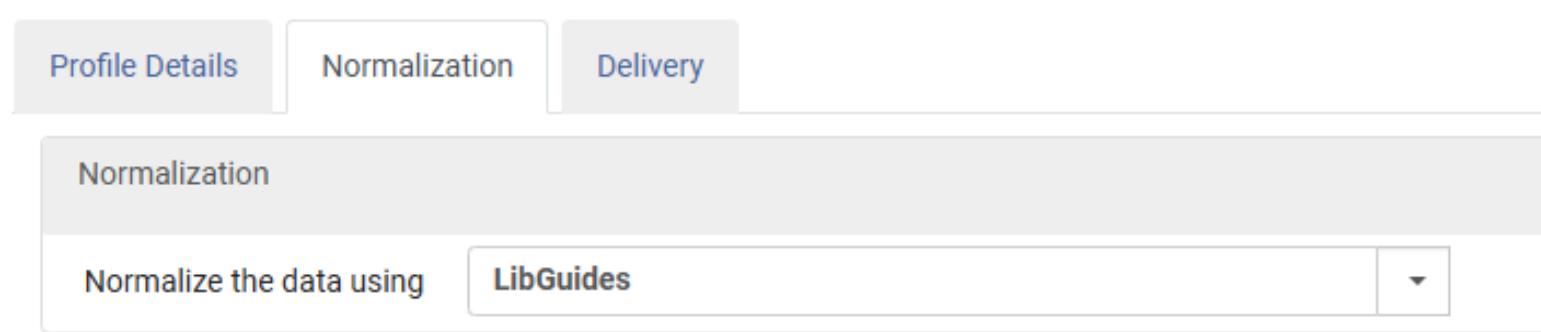
GENERIC XML DROOL NORMALIZATION

Drools File Key * LibGuides

NEW PROCESS WORKFLOW IN ALMA

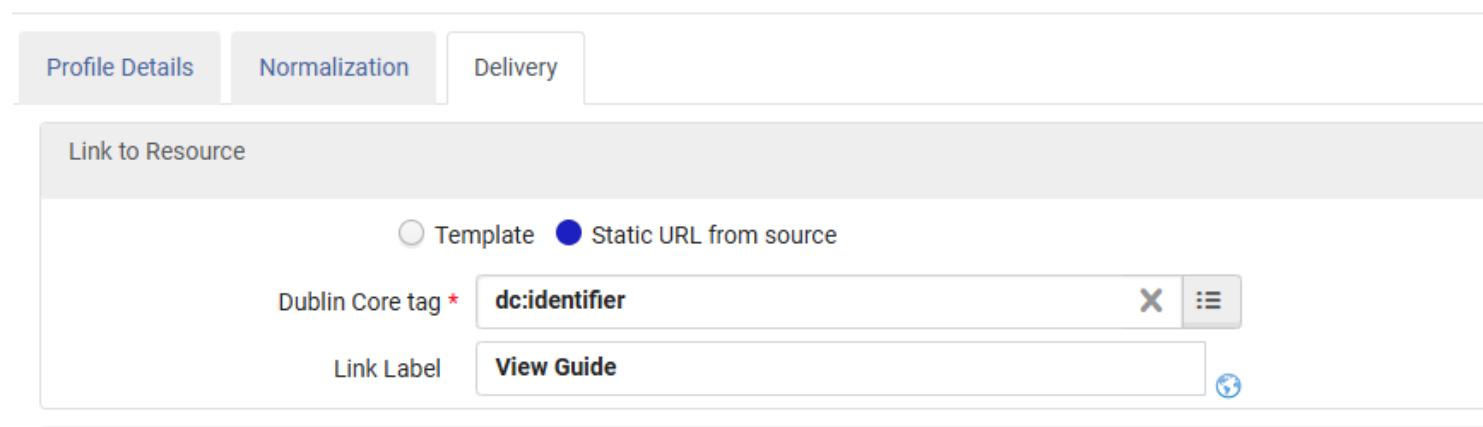
1. Created a new import profile
2. Created normalization rule to map XML fields to DC elements
3. **Created normalization process with rule**

NEW PROCESS WORKFLOW IN ALMA



1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements
3. Created normalization process with rule
4. **Added normalization process to import profile**

NEW PROCESS WORKFLOW IN ALMA



1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements
3. Created normalization process with rule
4. Added normalization process to import profile
5. **Added DC tag with resource link to import profile delivery section**

Custom Local Resource Types

General

Code *	LGUNPUB	Active <input checked="" type="checkbox"/>	
Display Singular Label *	Unpublished Guide	Display Plural Label *	Unpublished Guides
RIS type	Generic	Genre	Unknown
Metadata format	Book		

Mapping from MARC records

Mapping from Dublin Core

1 - 1 of 1

Logic	Dublin Core tag	Value in Dublin Core
1 -	dcterms:extent	Unpublished

Custom Local Resource Types

General

Code *	LGPRIVATE	Active <input checked="" type="checkbox"/>	
Display Singular Label *	Private Guide	Display Plural Label *	Private Guides
RIS type	Generic	Genre	Unknown
Metadata format	Book		

Mapping from MARC records

Mapping from Dublin Core

1 - 1 of 1

Logic	Dublin Core tag	Value in Dublin Core
1 -	dcterms:extent	Private

NEW PROCESS WORKFLOW IN ALMA

1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements
3. Created normalization process with rule
4. Added normalization process to import profile
5. Added DC tag with resource link to import profile delivery section
6. Local resource types

NEW PROCESS WORKFLOW IN ALMA

1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements
3. Created normalization process with rule
4. Added normalization process to import profile
5. Added DC tag with resource link to import profile delivery section
6. Created resource types
7. **Restricted search groups**

Restricted Search Groups

1 - 2 of 2

[+ Add Restricted Search Group](#)



Code	Name	Description	Definition
1 LGPRIVATE	Private Libguides	Hides Private LibGuides	"External data source" Equals "LibGuides" And "Resource Type" Equals "Private Guides"
2 LGUNPUB	Unpublished LibGuides	Hides unpublished LibGuides	"External data source" Equals "LibGuides" And "Resource Type" Equals "Unpublished Guides"

Restricted Search Group Definition

[Cancel](#)

Details

Code LGPRIVATE

Name Private Libguides

Description Hides Private LibGuides

Restricted Search Conditions

[Clear Conditions](#) [Settings](#)

Logic	Search Index	Operator	Value
1 -	External data source	Equals	LibGuides
2 And	Resource Type	Equals	Private Guides

Restricted Search Group Definition

[Cancel](#)

Details

Code LGUNPUB

Name Unpublished LibGuides

Description Hides unpublished LibGuides

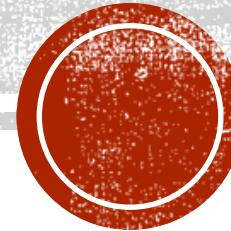
Restricted Search Conditions

[Clear Conditions](#) [Settings](#)

Logic	Search Index	Operator	Value
1 -	External data source	Equals	LibGuides
2 And	Resource Type	Equals	Unpublished Guides

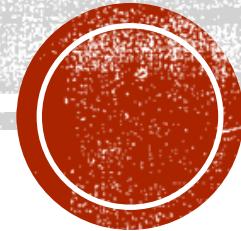
```
<item>
  <id>223046</id>
  <name>General Reference Sources</name>
  <description></description>
  <owner_id>7972</owner_id>
  <updated>2025-06-04 20:58:51</updated>
  <status_label>Private</status_label>
  <type_label>Topic Guide</type_label>
  <friendly_url>https://libguides.uky.edu/ref</friendly_url>
  <url>https://libguides.uky.edu/c.php?q=223046</url>
  <owner>
    <id>7972</id>
    <first_name>Stacey</first_name>
    <last_name>Greenwell</last_name>
  </owner>
</item>
<item>
  <id>223353</id>
  <name>The I-LEARN Model</name>
  <description>Guide which describes and provides example of a learning model to support student crit</description>
  <owner_id>7972</owner_id>
  <updated>2025-06-04 20:22:30</updated>
  <status_label>Published</status_label>
  <type_label>Topic Guide</type_label>
  <friendly_url>https://libguides.uky.edu/ilearn</friendly_url>
  <url>https://libguides.uky.edu/c.php?q=223353</url>
  <owner>
    <id>7972</id>
    <first_name>Stacey</first_name>
    <last_name>Greenwell</last_name>
  </owner>
</item>
```

EXAMPLE RECORDS



```
<item>
  <id>595234</id>
  <name>Breaking News: Real, Disinformation, or Mash-up?</name>
  <description>A guide to determining reliability, credibility and bias in news
  <owner_id>7972</owner_id>
  <updated>2023-10-05 16:36:27</updated>
  <status_label>Unpublished</status_label>
  <type_label>Topic Guide</type_label>
  <friendly_url>https://libguides.uky.edu/breakingnews</friendly_url>
  <url>https://libguides.uky.edu/c.php?g=595234</url>
  <owner>
    <id>7972</id>
    <first_name>Stacey</first_name>
    <last_name>Greenwell</last_name>
  </owner>
</item>
```

EXAMPLE RECORDS



1 RESEARCH GUIDE
Integrated Strategic Communication
Stacey Greenwell
 [Available Online](#) 

2 RESEARCH GUIDE
The I-LEARN Model
Stacey Greenwell
 [Available Online](#) 

3 RESEARCH GUIDE
Resources for MSLS Students
Stacey Greenwell
 [Available Online](#) 

4 RESEARCH GUIDE
Lewis Honors College
Stacey Greenwell
 [Available Online](#) 

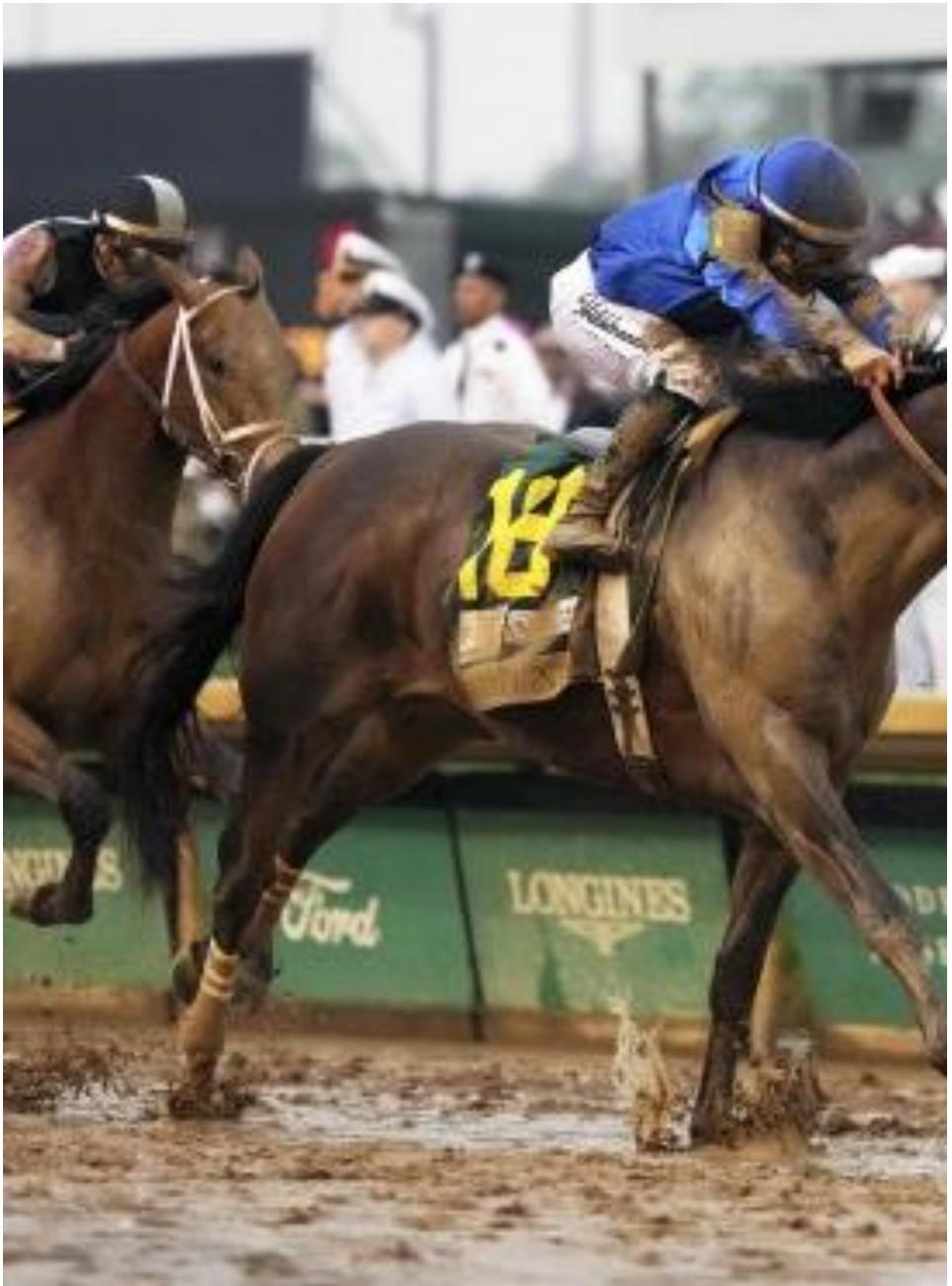
5 RESEARCH GUIDE
Communication
Stacey Greenwell
 [Available Online](#) 

6 RESEARCH GUIDE
Information Communication Technology
Stacey Greenwell
 [Available Online](#) 

7 RESEARCH GUIDE
Library & Information Science
Stacey Greenwell
 [Available Online](#) 

8 RESEARCH GUIDE
Journalism & Media
Stacey Greenwell
 [Available Online](#) 





WE BACKED THE WINNING HORSE!

Questions?

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Thank you!

