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

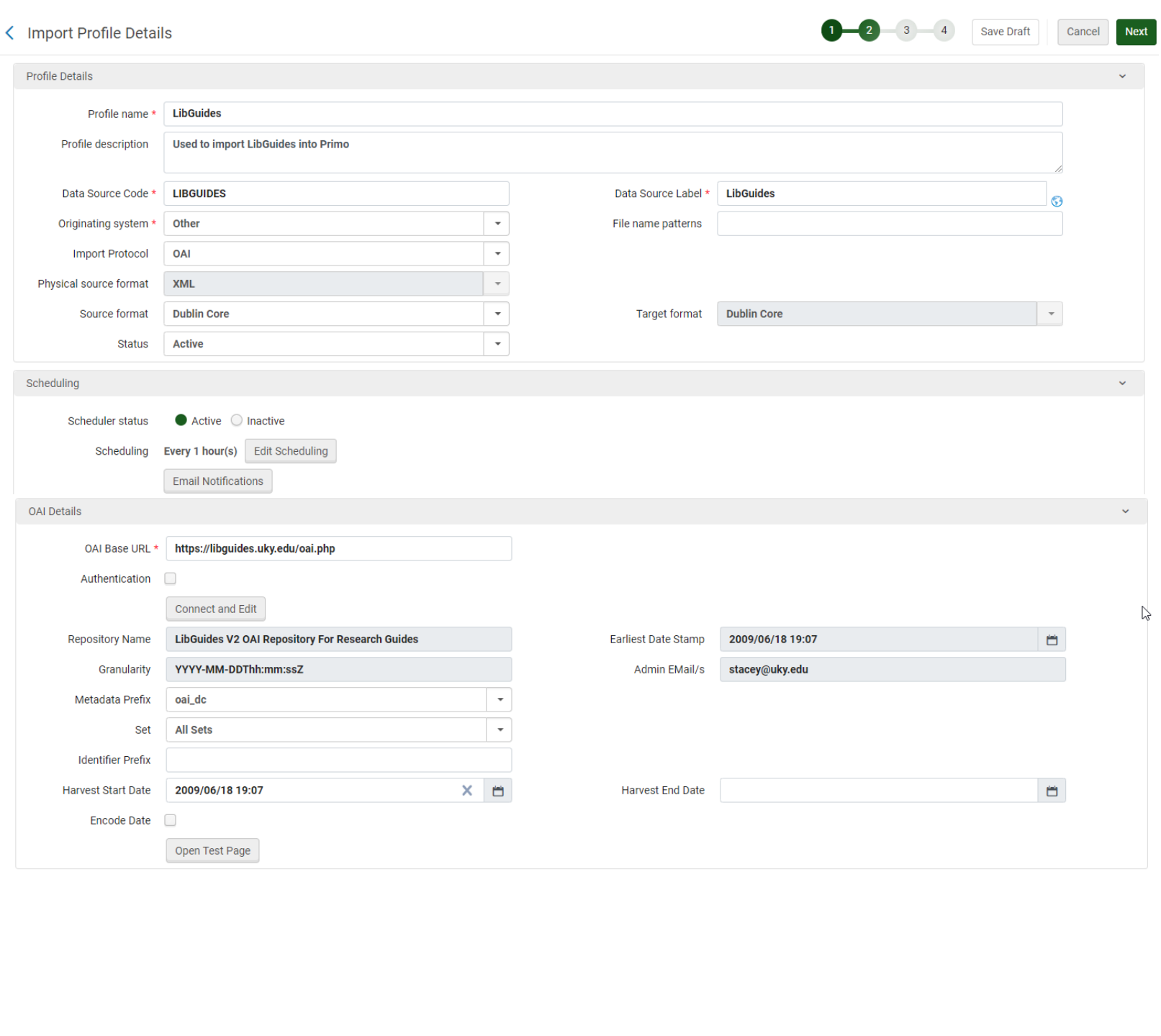
- First leg of the Triple Crown of Thoroughbred Racing, held annually on the first Saturday in May
- Tradition goes back to 1875
- Maximum of 20 horses race 10 furloughs (1 ¼ miles or 2,012 meters) at Churchill Downs in Louisville, Kentucky
- Prize is a $5 million purse and a blanket of roses (“run for the roses”)
- Known for speed (“fastest two minutes in sports”) and style (derby hats and vibrant colors)

- 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 Will private and/or unpublished guides be loaded ?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Will private and/or unpublished guides be loaded?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

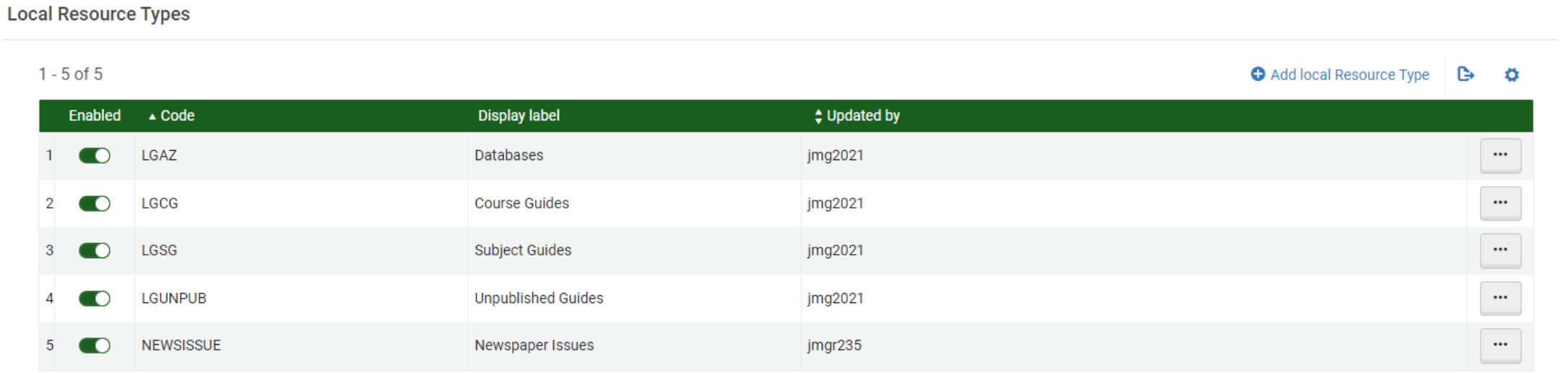
If a guide is published – yes, but if it is unpublished after the record stays but the link goes nowhere	If a guide is unpublished at time of load – no, but if it is then published, the records would need to be reloaded



FIRST ATTEMPT

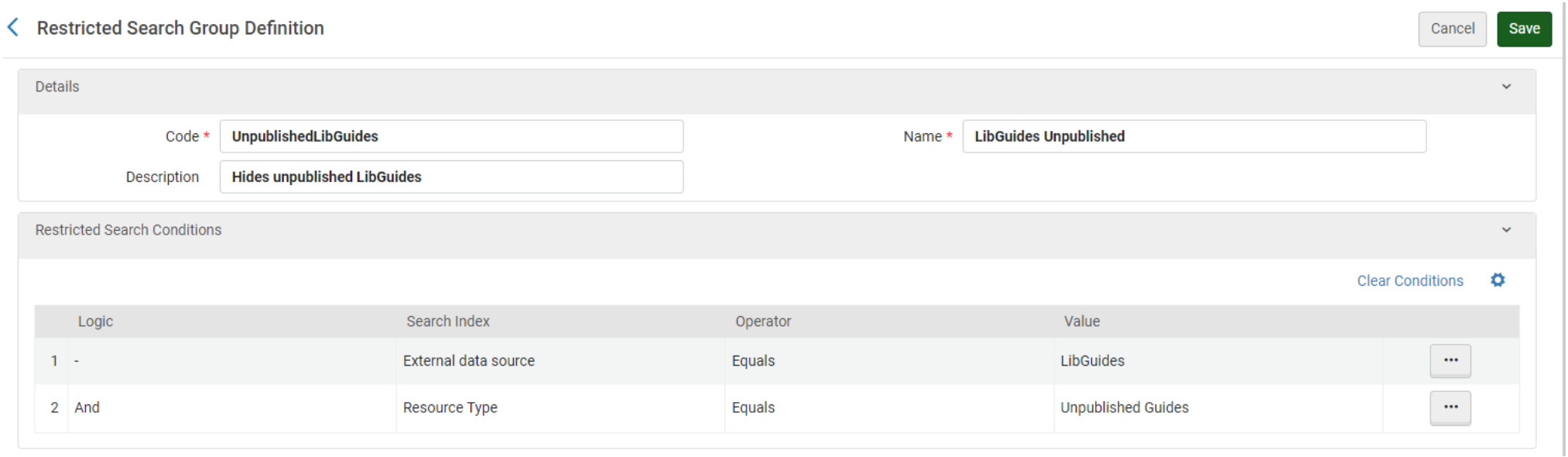
1. Created Discovery Import Profile
2. Created Local Resource Types
3. Created Restricted Search Group rule
4. Created Normalization Rules
5. Created/applied normalization process

1. Created Local Resource Type for Unpublished guides



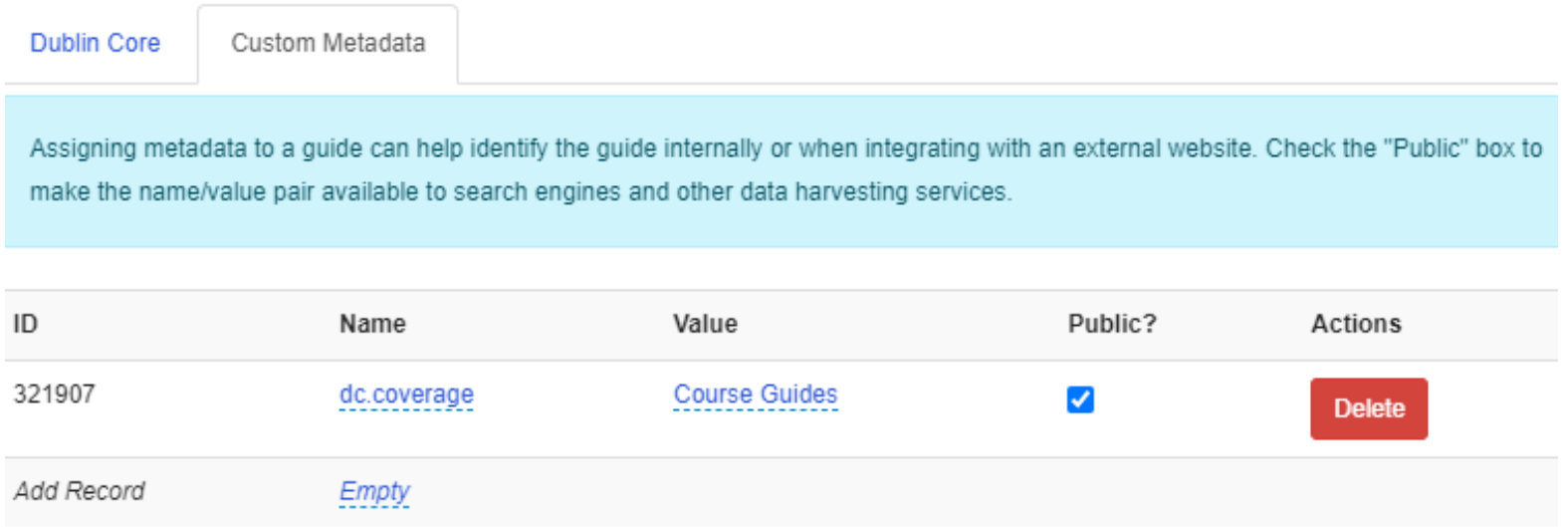
LOCAL RESOURCE TYPE

2. Created Restricted Search Group for unpublished guide



RESTRICTED SEARCH GROUP

3. Asked guide creators to edit custom metadata

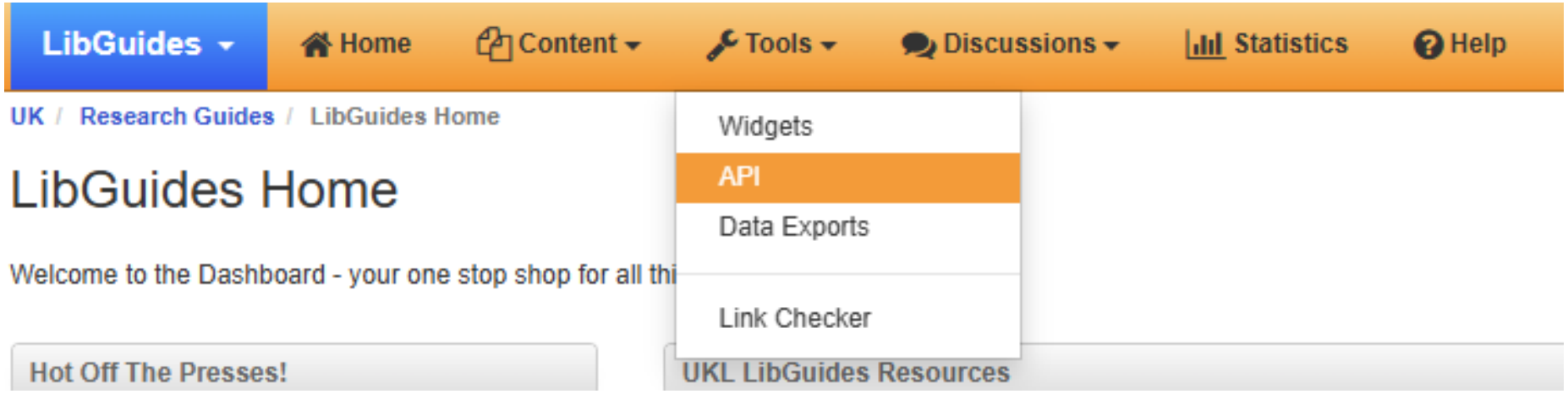


CUSTOM LIBGUIDE METADATA

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"



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

Route Details

optional	Numeric	**Numeric** - Multiple ids 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[]=Geology	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"

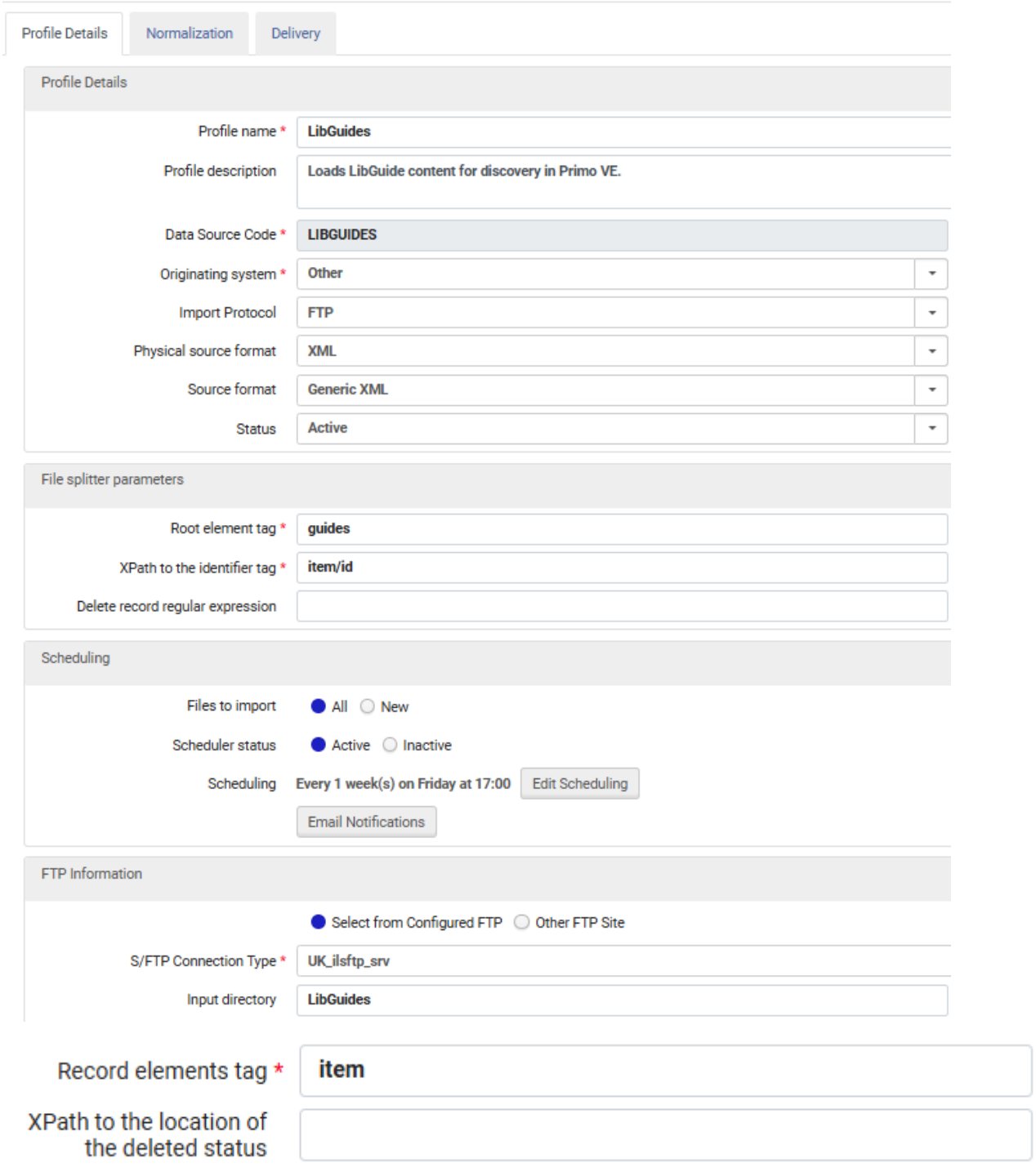
A script would perform an API call to Springshare to pull in the following elements:

- 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

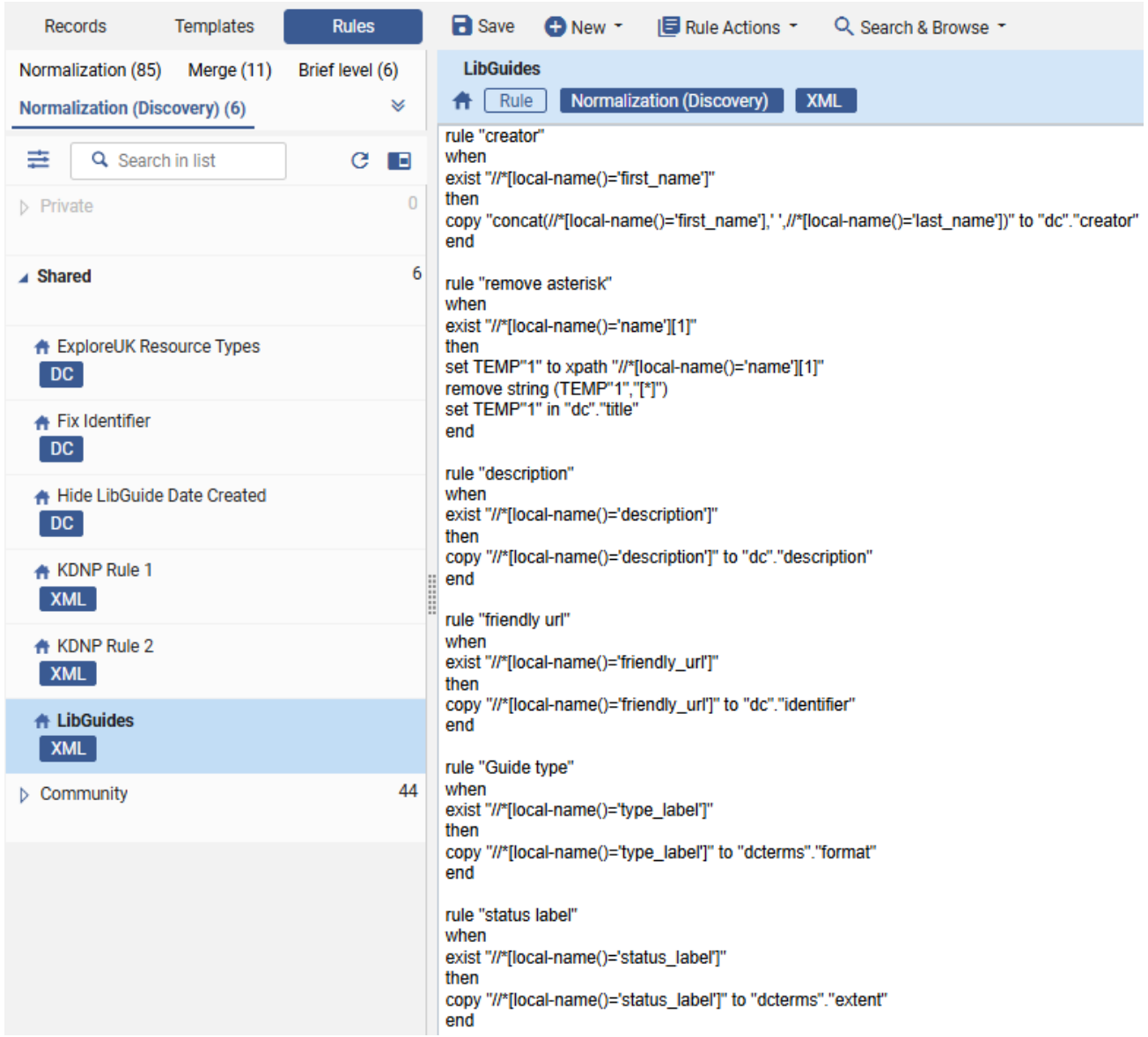
```
52              # Topic guides
53              if item['type_id'] == 3 or item['type_id'] == 4:
54
55                  # common fields
56                  xml += '<item>\n'
57                  xml += '\t<id>'+str(item['id'])+'</id>\n'
58
59                  # Some names/descriptions are coming through 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'
```



NEW PROCESS WORKFLOW IN ALMA

1. Created a new import profile

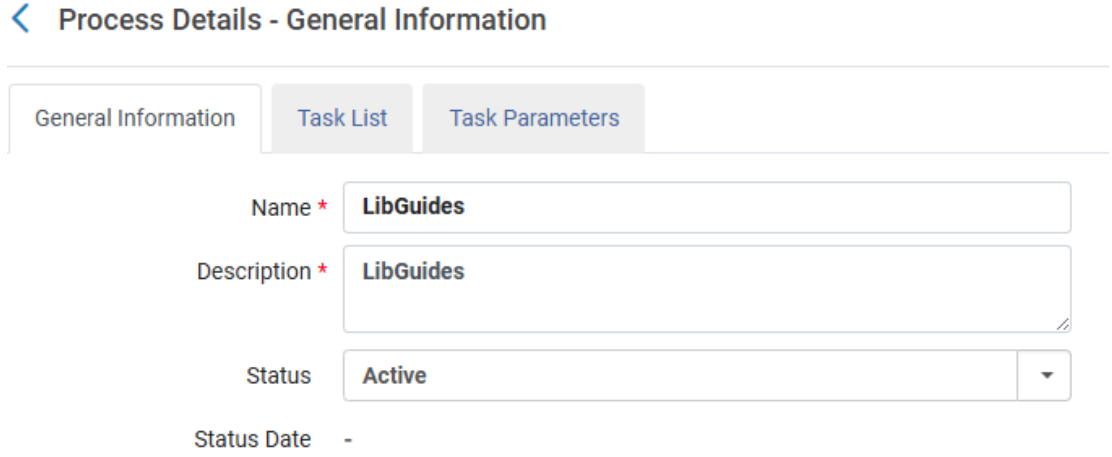
NEW PROCESS WORKFLOW IN ALMA

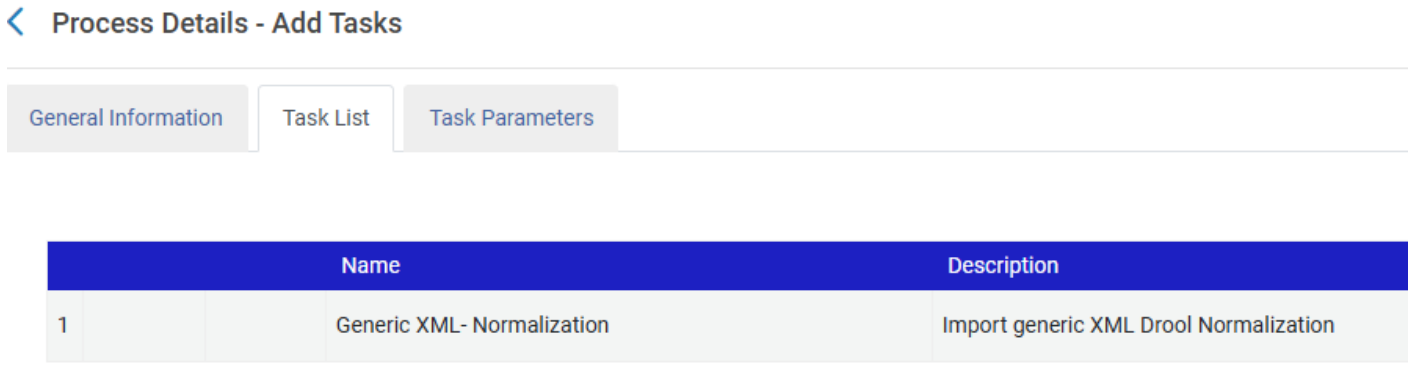


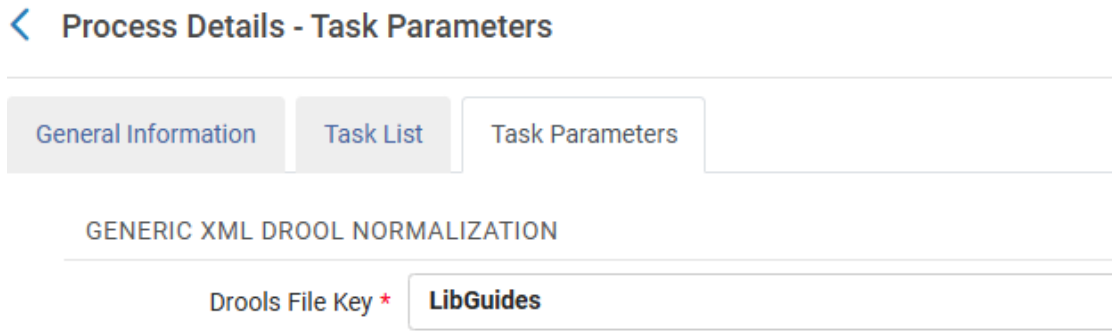
1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements

NEW PROCESS WORKFLOW IN ALMA

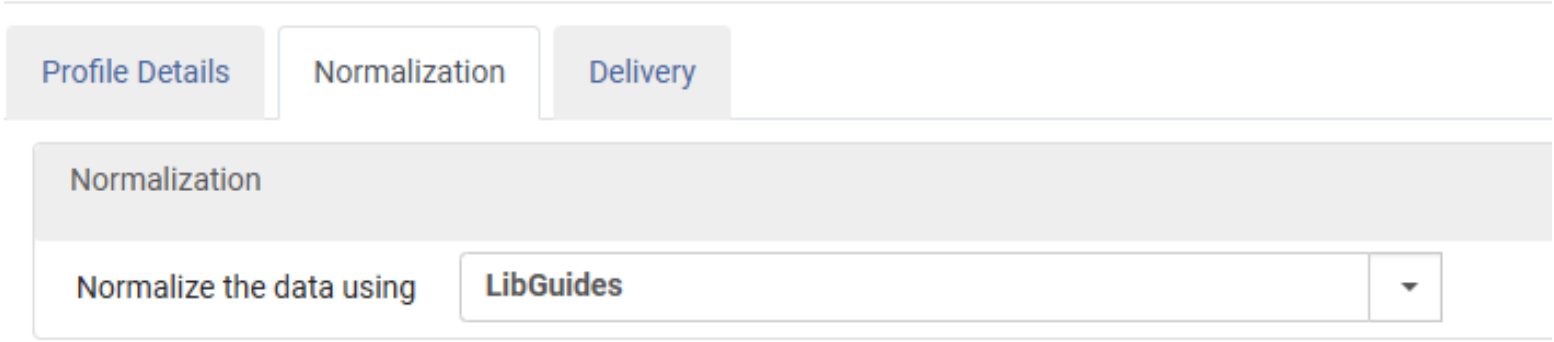
1. Created a new import profile
2. Created normalization rule to map XML fields to DC elements
3. Created normalization process with rule





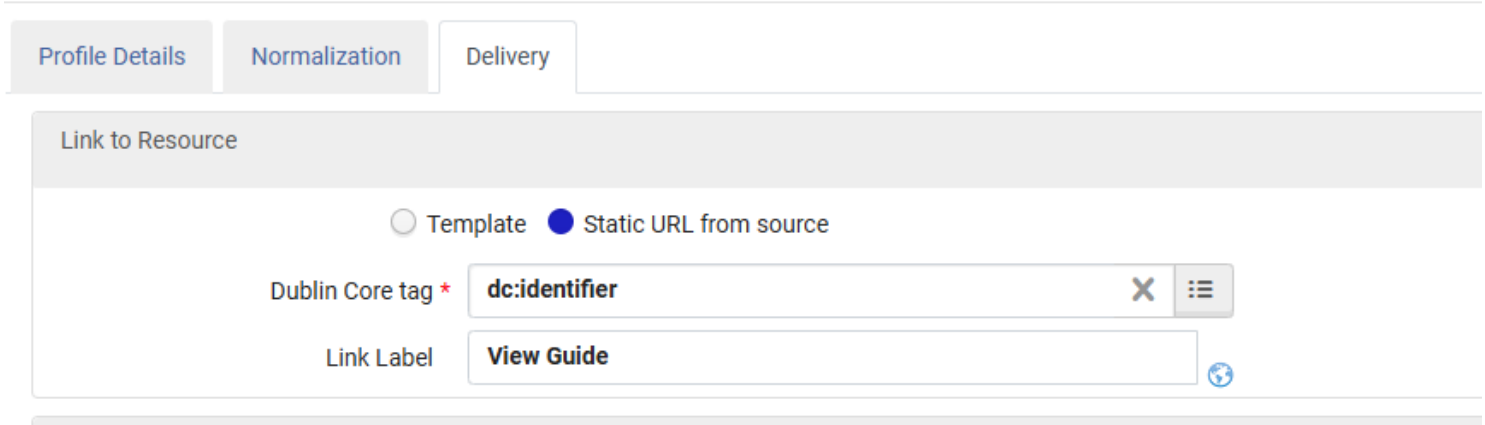


NEW PROCESS WORKFLOW IN ALMA

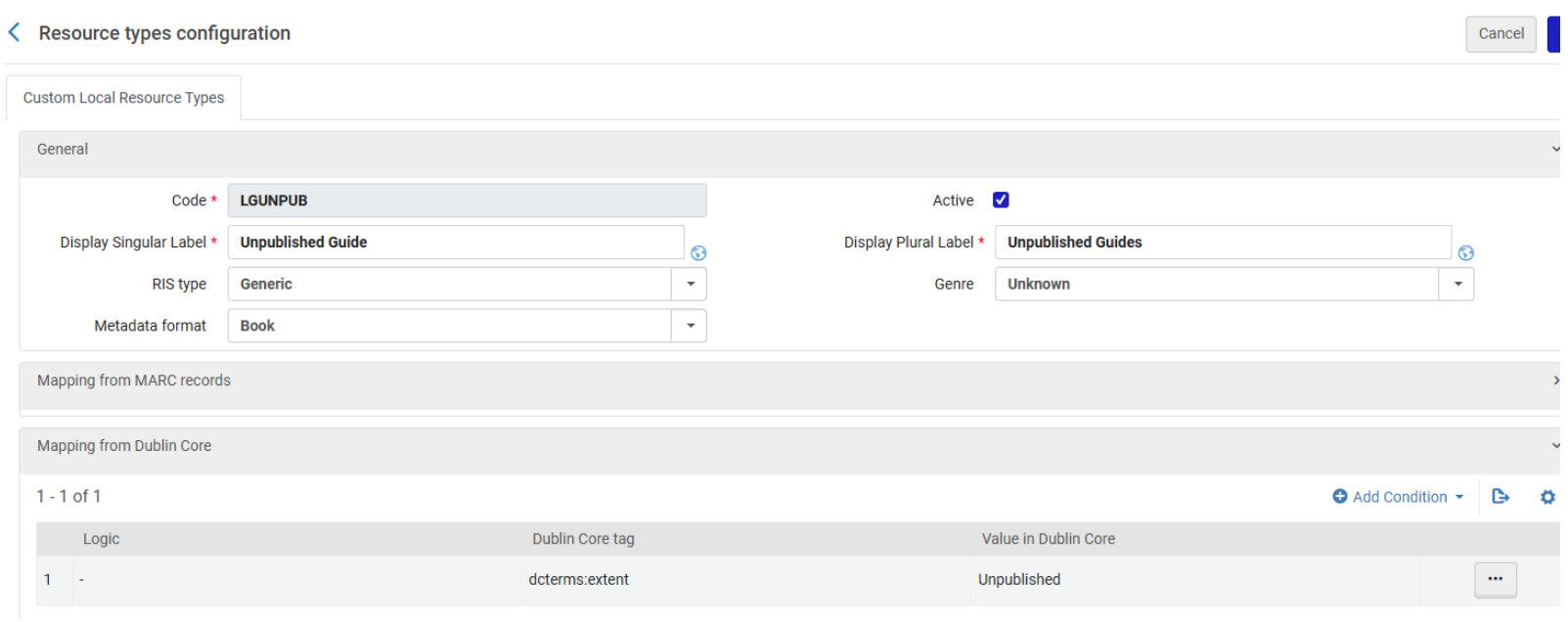


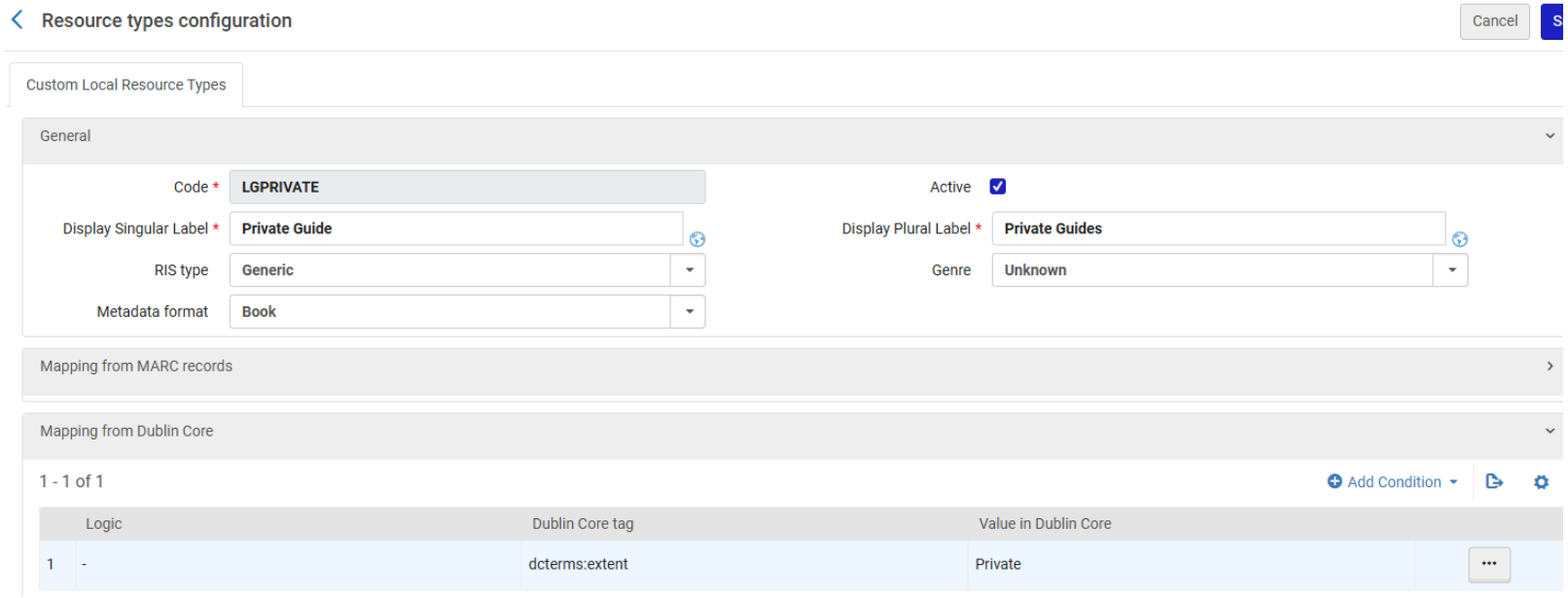
1. Created a new import profile
2. Created normalization rules to map XML fields to DC elements
3. Created normalization process with rule
4. Added normalization process to import profile

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



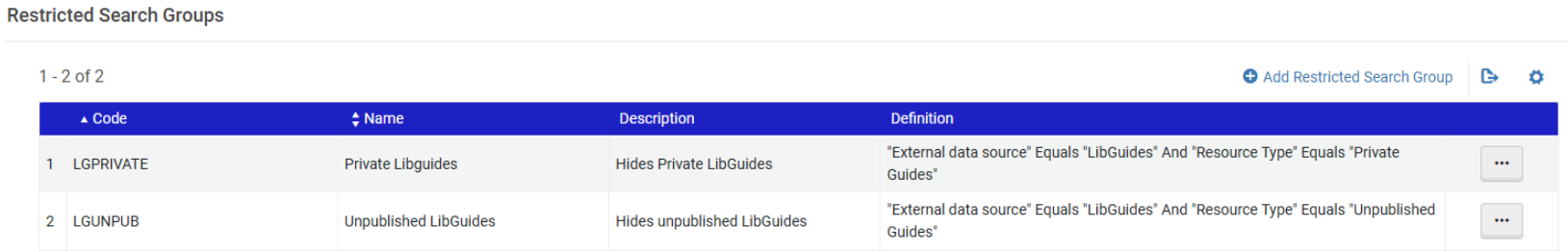


NEW PROCESS WORKFLOW IN ALMA

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

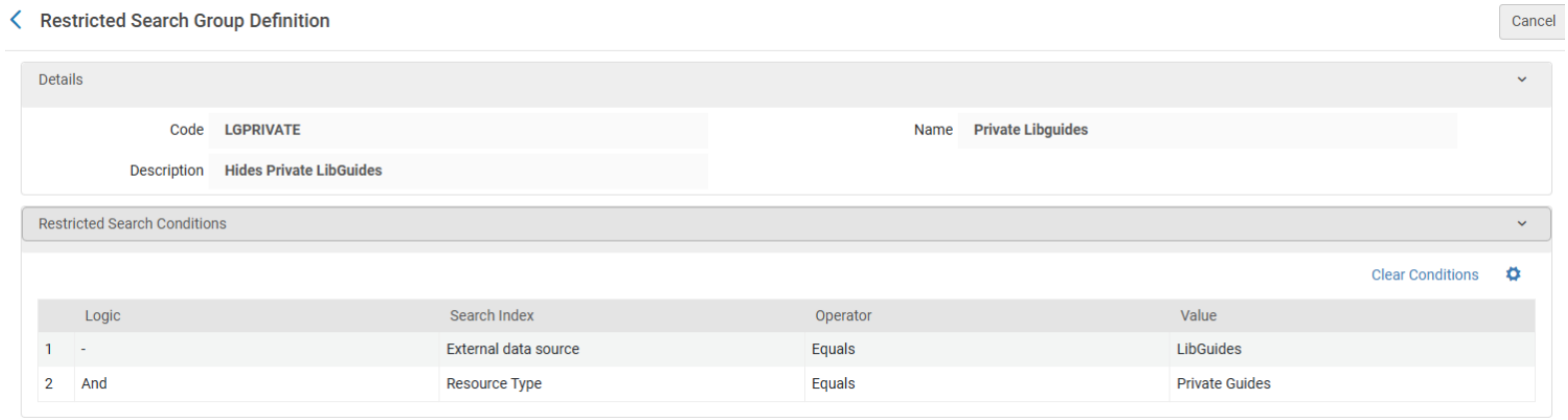


Restricted Search Groups

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**

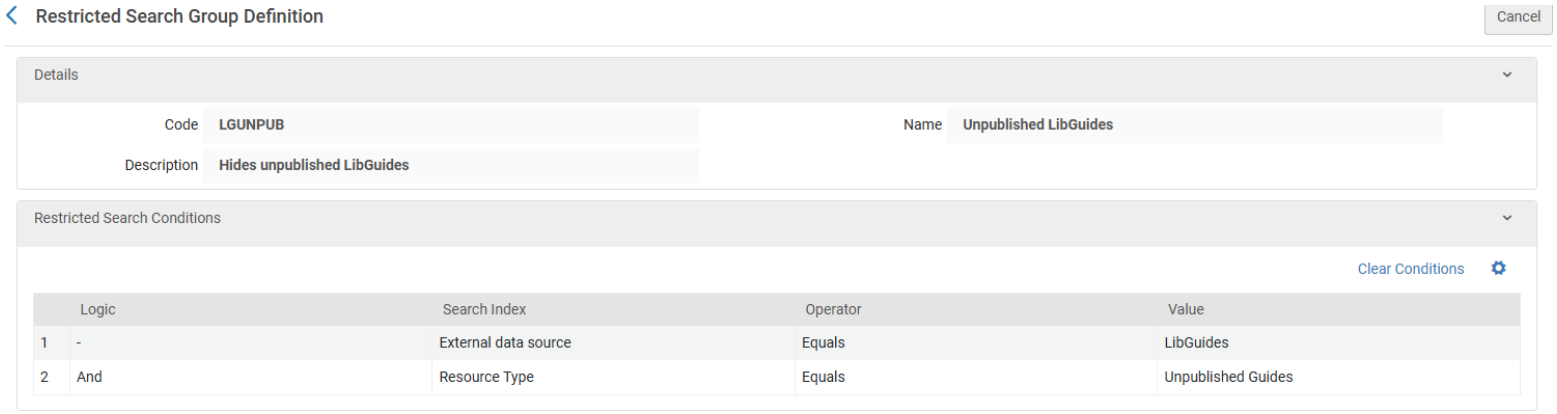
Name **Private Libguides**

Description **Hides Private LibGuides**

Restricted Search Conditions

Clear Conditions

	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

	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?g=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
<owner_id>7972</owner_id>
<updated>2025-06-04 20:22:38</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?g=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?

Jason.Griffith@uky.edu

Thank you!