



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)



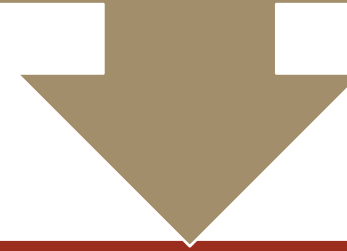


BACKGROUND

- 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 Will private and/or unpublished guides be loaded ?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Will private and/or unpublished guides be loaded?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If a guide is published – yes, but if it is unpublished after the record stays but the link goes nowhere

If a guide is unpublished at time of load – no, but if it is then published, the records would need to be reloaded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

Data Source Label *
LibGuides

Originating system *
Other

File name patterns

Import Protocol
OAI

Physical source format
XML

Source format
Dublin Core

Status
Active

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
Connect and Edit

Repository Name
LibGuides V2 OAI Repository For Research Guides

Granularity
YYYY-MM-DDThh:mm:ssZ

Metadata Prefix
oai_dc

Set
All Sets

Identifier Prefix

Harvest Start Date
2009/06/18 19:07

Encode Date
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](#)

CancelSave

Details

Code *UnpublishedLibGuides

Name *LibGuides Unpublished

DescriptionHides 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	...

RESTRICTED SEARCH GROUP



3. Asked guide creators to edit custom metadata

Dublin Core

Custom Metadata

Assigning metadata to a guide can help identify the guide internally or when integrating with an external website. Check the "Public" box to make the name/value pair available to search engines and other data harvesting services.

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

CUSTOM LIBGUIDE METADATA



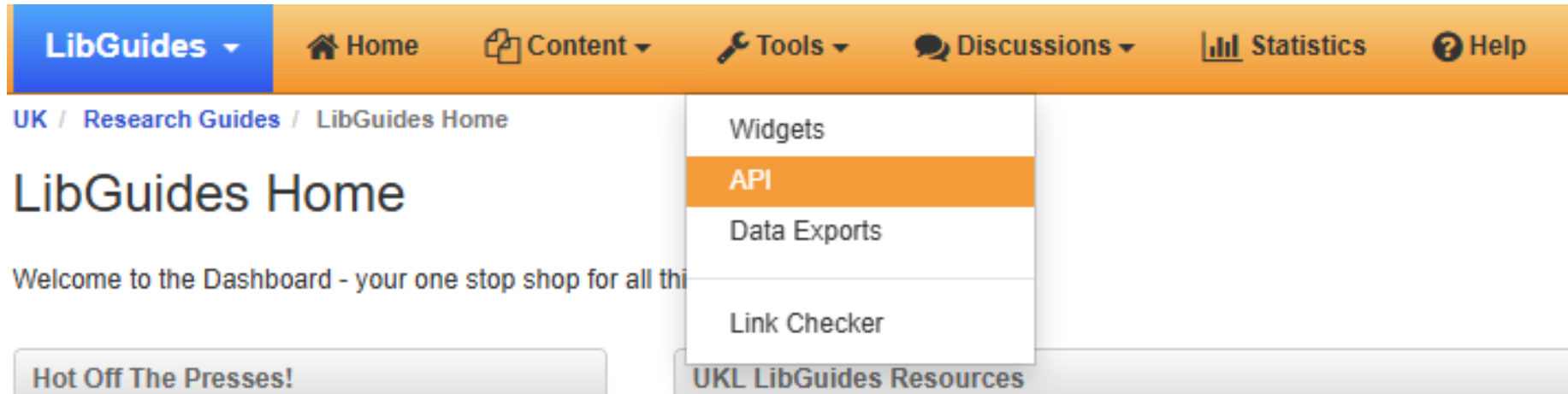


**“CLOSE BUT NO
CIGAR”**

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 page. The top navigation bar is orange and contains the following links: LibGuides (with a dropdown arrow), Home (with a house icon), Content (with a folder icon and a dropdown arrow), Tools (with a wrench icon and a dropdown arrow), Discussions (with a speech bubble icon and a dropdown arrow), Statistics (with a bar chart icon), and Help (with a question mark icon). The Tools dropdown menu is open, showing the following options: Widgets, API (highlighted in orange), Data Exports, and Link Checker. The main content area has a blue header with the text "UK / Research Guides / LibGuides Home". Below this is the "LibGuides Home" heading and a welcome message: "Welcome to the Dashboard - your one stop shop for all the". There are two grey boxes at the bottom: "Hot Off The Presses!" on the left and "UKL LibGuides Resources" on the right.

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



Route Details			
optional	Numeric	Numeric - Multiple ids using array syntax, i.e. <code>subject_ids[]=1&subject_ids[]=2</code>	
subjects_logic optional	String	and or	Logical operator to use for filtering by <code>subject_ids</code> .
tag_names optional	String	String - Comma-delimited list of tag names Numeric - Multiple names using array syntax, i.e. <code>tag_names[]=Art&tag_names[]=Geology</code>	Filter by tag names.
tag_names_match optional	Numeric	1 - Exact match (default) 2 - Contains	Used in conjunction with <code>tag_names</code> .
status optional	String Numeric	String - Comma-delimited list of status ids Numeric - Multiple ids using array syntax, i.e. <code>status[]=1&status[]=2</code> 0 - Unpublished 1 - Published 2 - Private 3 - Submit for Review	Filter by guide statuses (except when <code>sort_by=relevance</code>).
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 <code>last_update</code> .
last_update optional	String	String - If <code>update_type=since</code> then this parameter should be a date (yyyy-mm-dd) Numeric - If <code>update_type=last</code> then this parameter should be a number	Used in conjunction with <code>update_type</code> .

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

Normalization

Delivery

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

All

New

Scheduler status

Active

Inactive

Scheduling

Every 1 week(s) on Friday at 17:00

Edit Scheduling

Email Notifications

FTP Information

Select from Configured FTP

Other FTP Site

S/FTP Connection Type *

UK_ilsftp_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

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

RecordsTemplatesRules

Normalization (85)Merge (11)Brief level (6)

Normalization (Discovery) (6)

Search in list

Private0

Shared6

ExploreUK Resource Types
DC

Fix Identifier
DC

Hide LibGuide Date Created
DC

KDNP Rule 1
XML

KDNP Rule 2
XML

LibGuides
XML

Community44

SaveNewRule ActionsSearch & Browse

LibGuides

RuleNormalization (Discovery)XML

```
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","[*]")
  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
```



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

Profile Details

Normalization

Delivery

Normalization

Normalize the data using

LibGuides

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

Profile Details

Normalization

Delivery

Link to Resource

☐ Template ☒ Static URL from source

Dublin Core tag * ✕ ⋮

Link Label 🌐

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



<

Resource types configuration

Cancel

Custom Local Resource Types

General

Code *

LGUNPUB

Display Singular Label *

Unpublished Guide

RIS type

Generic

Metadata format

Book

Active

☒

Display Plural Label *

Unpublished Guides

Genre

Unknown

Mapping from MARC records

Mapping from Dublin Core

1 - 1 of 1

+ Add Condition

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

<

Resource types configuration

Cancel

Custom Local Resource Types

General

Code *

LGPRIVATE

Display Singular Label *

Private Guide

RIS type

Generic

Metadata format

Book

Active

☒

Display Plural Label *

Private Guides

Genre

Unknown

Mapping from MARC records

Mapping from Dublin Core

1 - 1 of 1

+ Add Condition

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



Restricted Search Groups

1 - 2 of 2

[Add Restricted Search Group](#) [Share](#) [Settings](#)

	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

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**

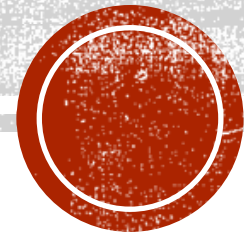


```

<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	 <p>RESEARCH GUIDE Integrated Strategic Communication <u>Stacey Greenwell</u> Available Online  ></p>	   
2	 <p>RESEARCH GUIDE The I-LEARN Model <u>Stacey Greenwell</u> Available Online  ></p>	   
3	 <p>RESEARCH GUIDE Resources for MSLS Students <u>Stacey Greenwell</u> Available Online  ></p>	   
4	 <p>RESEARCH GUIDE Lewis Honors College <u>Stacey Greenwell</u> Available Online  ></p>	   
5	 <p>RESEARCH GUIDE Communication <u>Stacey Greenwell</u> Available Online  ></p>	   
6	 <p>RESEARCH GUIDE Information Communication Technology <u>Stacey Greenwell</u> Available Online  ></p>	   
7	 <p>RESEARCH GUIDE Library & Information Science <u>Stacey Greenwell</u> Available Online  ></p>	   
8	 <p>RESEARCH GUIDE Journalism & Media <u>Stacey Greenwell</u> Available Online  ></p>	   





WE BACKED THE WINNING HORSE!

Questions?

Jason.Griffith@uky.edu

Thank you!

