Primo VE Administrator Certification Video 6: External Resources: Loading Data

Created for SUNY Libraries by SUNY Project Mgmt. Team

Link to Video (15 Minutes):
https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Primo_VE_Certification/06_External_Resources%3A>Loading_Data

Related Documentation:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/045Loading_Records_from_External_Sources_into_Primo_VE

https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Rules#Normalization_Rules

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/045Loading_Records_from_External_Sources_into_Primo_VE/Using_the_Mapping_Table_to_Map_Resource_Types

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/045Loading_Records_from_External_Sources_into_Primo_VE/Configuring_Import_Profiles_for_Primo_VE

Libguides and OAI Harvesting:
https://ask.springshare.com/libguides/faq/804

https://developers.exlibrisgroup.com/blog/Adding-Springshare-Libguide-Discovery-to-Primo-VE/

OAI Harvesting:
https://www.openarchives.org/OAI/openarchivesprotocol.html

Content dm OAI harvesting (used for NY Heritage):
https://help.oclc.org/Metadata_Services/CONTENTdm/CONTENTdm_Administration/Server_Administration/020Harvesting (note that SUNY is discussing configuration and information needed for NY heritage harvesting with NY Heritage administrators).

Related Videos (2 Hours):
Recent video of Lynn Configuring OAI Harvesting and Import Profile for SUNY New Paltz Dspace Collection (about 1 hour): https://public.3.basecamp.com/p/skmE68Pf8jjUj4rNWqYFZGT

Video of Lynn Configuring OAI Harvesting and Import Profile for Buffalo’s Digital Commons (about 1 hour):
https://public.3.basecamp.com/p/wD4sNHoeXpop5ExCpeZ7hEV6
Normalization Rules

- Almost all use of external resources will be Dublin Core, so it’s a good idea to focus on the Dublin Core Normalization Rules.
- The example of the video is a good one that you may use when you import your data from your institutional repository. You may want to take a Dublin core field such as a dc.type and then set a Primo resource type.
- There are 3 possible conditions that the training covers quite well, which means that there’s a lot of potential to manipulate data, and have a high level of precision on what’s changed. It’s good to know all of these scenarios so that you can set up appropriate norm. rules at the outset so you don’t need to/want to review data after 1-2 test imports.
- Possible actions also provide a wide range of ability to move, remove, or manipulate data.
Testing Normalization Rules

- To test normalization rules, you’ll need to upload a test record from the external data source.
- You can test either normalization rules or a normalization process.
- As with Alma, you can see the source record and the product of the normalization side by side.

Normalization Process Tasks

- In general, the process is pretty straightforward with a relatively intuitive wizard. However, Step 3 is a bit confusing in that you need to add “placeholders” — DC Import DroolNormalizations that you will use to then add the normalization rules.
- You would then add the specific normalization rules you have created, or are available to you.
Discovery Import Profiles

- In the Discovery Import Profiles, there are some fields that aren’t well explained, and really are just for your own use to organize and label for you to understand what this import profile is for:
  - Data Source Code: this doesn’t have any meaning outside of the one you want to create—so think about whether you want to use some standardization. For example, you may have 5 import profiles for 5 different Dspace or Institutional Repository collections, so you’d want to make sure you could easily tell which is which.
  - Data Source Label: Used for display, and can be translated, so you can use this how you want, but know that it will be displayed to users, so treat it as such.
- When you get to test a Discovery Import Profile, you will see that, as with almost any configuration in Alma, once you select different configuration, many other options are displayed. The trainer only mentions OAI harvesting or scheduling imports, as she’s demonstrating Uploading a file. But, once you select that you will be harvesting records, you need to provide further information, and schedule whether you will harvest only new records, and define a frequency of harvest.
- Link Label: this will likely be very useful for anyone who is going to be harvesting from an institutional repository, as links are typically in identifiers, of which there are many. Using regular expression to find the link in the identifier field is a very useful tool.

Institutional Repository (DSpace) Import Profile Details

OAI Details for Dspace for SUNY Dspace/Digital Repository (Note that this is initial documentation for testing, and we will be providing step-by-step documentation soon):
Once you provide the OAI Base URL, you can then view the sets (collections/communities) available to you. Here’s the root OA Base URL for the SUNY Digital Repository:

https://dspace.sunyconnect.suny.edu/oai/request

The process for configuring OAI-PMH harvesting for Dspace is similar to what you’ll use for other external sources such as libguides, Contentdm/NY Heritage, or others. It’s a great way to get regular updates, and using normalization rules and processes manipulate that data to display in the best way in Primo VE.

More step-by-step documentation will be forthcoming, but the information in the videos and the documentation linked to should allow campuses to begin working on testing this if you’re willing to work through some steps yourself.