Primo VE Administration  
External Data Sources

Hello! Primo VE allows you to import records from external sources so users can find them in your local catalog. You can import records in generic XML, Dublin Core, and MARC21 formats.

In this session you will learn about the Normalization Rules, to add enhancements to the data and improve searching and/or faceting in Primo VE, if necessary; how to configure and run Discovery Import profiles, which is the process of loading records from external sources, and how to delete records that have been loaded into Primo VE.

Please note, that these records are loaded directly into Primo VE, and cannot be searched and/or viewed using Alma’s repository search. You will only be able to see them in Discovery.

The import process for Primo VE uses Alma import profiles and normalization rules to import generic XML, MARC 21, and/or Dublin Core records. To import these records you often first need to create normalization rules to copy and transform the data in the source records and store the normalized data in Primo VE using an expanded Dublin Core schema or MARC21. This adds additional fields that let you map resource types and other information for use in Primo VE. Please note, that depending on your data, this step may not be needed.

After you create the normalization rules, you need to add them to a Normalization Process. Then, during import, Alma will run your selected normalization process to properly format the imported records. To see existing normalization rules for Discovery or create a new one you’ll go to Alma Configuration > Discovery > Loading External Data Sources > Normalization rules for External Data Sources. This loads the MD Editor.

Next you’ll test the normalization rules and processes prior to loading the records by using a sample record from your external source, not Alma. When you’re happy with the results, you’ll create a Discovery import profile and import your external records.

Make sure you are on the Rules tab, and you can check to see if there is an existing rule under Normalization (Discovery) that can be modified or used as the basis for your new rule. For this example, we’ll use an existing normalization rule. Please note, that only rules saved in the Shared folder will be available to be used for Normalization Rules. If you make any changes and/or want to test the rule, click the Save and test using external record button on the bottom right of the page. For more information about creating Normalization rules for Discovery, please visit the Knowledge Center.

Please note, that only rules saved in the Shared folder will be available to used for Normalization processes.

Next you need to create the Normalization Process Task. This process groups normalization rules files together so that they can be assigned to import profiles for further normalization of an external source’s records. To start this task, still in Configuration, you’ll go to Discovery > Loading External Data Sources > Normalization Process Task.

On the Process List page you can see any tasks that have already been defined at your institution. You can see there is already a Normalization for Discovery process task for Dublin Core. For this example, you’ll make one for XML data sources. Click Add Process.

The Business Entity refers to the type of bibliographic records that are provided by the external data source. For Dublin Core and generic XML you’ll select Discovery BIB Records, and Bibliographic title for MARC21 data sources. Since you’re creating a process for XML you’ll leave it as Discover BIB Records. The Type is the format type of the normalization rules that you need to process the import records. In this case you’ll select Discovery generic XML normalization. Then click Next.

On the next step you’ll give your process a name and description. Both of these fields are required, as denoted by the red asterisk. The status is whether or not you want this process to be active upon completion. Click Next when you’re done.

On the third page you’ll add the tasks for the process. Click Add Tasks. Check the box for the task(s) you want to add. If you want to add more than one click Add, otherwise click Add and Close. Click the row action tool and select Remove if you want to delete a task from the list. When you’re ready, click Next.

On the final step you’ll select the name of a shared normalization rule file that you want to run. Please note, Private normalization rule files cannot be added here. When you’re done click Save. And here is your new normalization rule process.

Use the toggle to activate it when you’re ready. For additional options, click the row action tool. From this menu you can View, Edit, Copy, or Delete the process.

Now that you have your process task set up, you need to add an Import profile in order to define the external data source, apply normalization rules, configure delivery links, and schedule the execution of the import profile job.

To define an Import profile for Discovery, either in Alma Configuration or from the main Alma dashboard, you’ll go to Discovery > Loading External Data Sources > Discovery Import Profiles. This page lists all the import profiles that have been configured at your institution, as well as the Network, and the Community. Please note, that you will only see the Network tab if you are part of a consortia environment. You need to create an Import profile for your institution, so you’ll click Add New Profile.

Make sure Discovery has been selected, then click Next. On the Profile Details page, the only required fields are a Profile name, Data Source Code, Data Source Label, and the Originating system. For more information about each of these fields, please visit the Knowledge Center.

For this example, let’s say you also need to set the Source format as Generic XML. When you select XML as the Source format, the File splitter parameters section will display. You are required to enter the Root element tag, Record elements tag, and the XPath to the identifier tag. For further information about the File splitter parameters or the parameters for other source formats, please visit the Knowledge Center. Once you’ve added all of your information, Click Next.

In the third step, you’ll select the Normalization processes that you want to use. For this example you’ll choose the process you created earlier. Click Next.

On the final step you’ll define the types of delivery that will be available.

Link to Resource will be listed in the View it section on the Full Display, and records with this type display as Available online on the Brief Results page, and are included with the Available online facet.

Link to Request will appear in the Links section of the Full Display page, and Check holdings status on the Brief Results page, and are included with the Held by library facet.

Link to Thumbnail displays the thumbnails for the resource type images.

There are two options for linking for each type, either by defining a template for linking or a static link to the source record.

If you select Static URL from Source, you’ll select the type of Dublin Core tag; and then you would fill in the standard link label that you would use for all records. Static links are good if you know that the data consistently has a link to the source records in one of the fields.

However, if you do not have a one unique, consistent data field that can be referred to, you’ll select the Template option. For this example, you only want to use the identifier that starts with http. In the Link to Resource section, you’ll enter $$LinkingParameter1 for the Template you want this link to use and then give it a link Label. Scroll down to the Linking Parameters section.

Open the row action tool for LinkingParameter1, and select Edit. In the pop-up, you’ll select the Source Tag dcterms:identifier. Next you need to determine when to use the source tag. Select Matching string using a regular expression, then type in a regular expression that can identify whether or not a field starts with http. We do not need to add normalization for this example, click Save when you’re done.

You can see LinkingParameter1 has now been defined. Repeat this process for any additional links you want to add. When you’re finished, click Save. Your Import Profile has now been added.

To run this profile you’ll click the row action tool and select Run. You’ll be prompted to upload your XML file. Once it has been added, you’ll click Submit. You are then taken to the Job History screen, where you can see that your job is being processed. Click Refresh to see if it has finished.

Finally, if needed, you can remove records that were loaded directly into Primo VE with a Discovery Import Profile. You’ll go back to Alma, then go to Admin > Manage Jobs and Sets > Run a Job.

The Run a Job page will default to a list of all jobs available to be run, so you’ll filter the type to Discovery Management. Select the radio button for Delete External Data Sources, then click Next. In the Data Source drop-down, select the profile name that was used to import the records you want to remove. If more than one profile was used to import the same records, choose the last one that was used. Click Next. Lastly, confirm the data source information and then click Submit.

Your job has now been submitted and the records from the selected Import Profile will be removed from Primo VE.

You now know the process of loading records from external sources, how to manage the necessary Normalization Rules, configure and run Discovery Import Profiles, and how to delete records that were loaded into Primo VE using a Discovery Import File.

Thanks for watching!