

How to Add Archives West as an External Data Source in Primo VE

March 2022

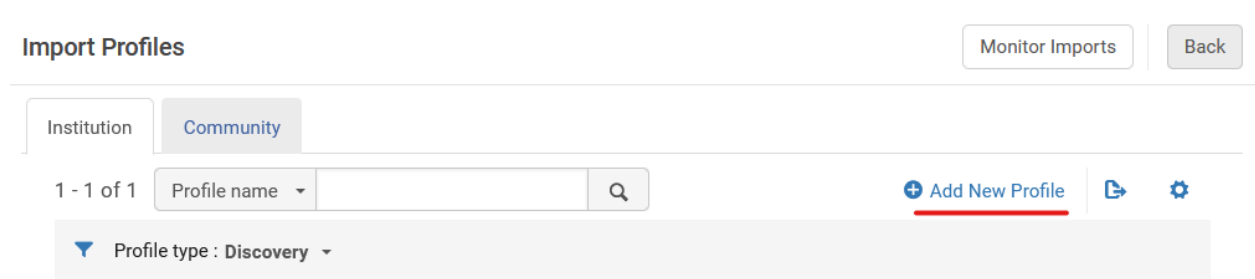
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As of February 2022, records from Archives West can be harvested into discovery systems through the [OAI-PMH protocol](#).

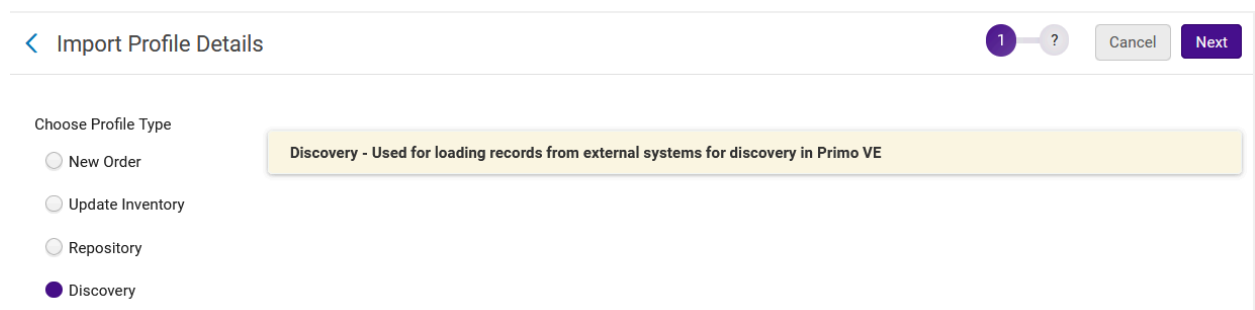
In Primo VE, a user with the “Discovery - Admin” role can set up and schedule the harvesting job in [Discovery Import Profiles](#).

1. Create an import profile.

Navigate to Configuration Menu > Discovery > Loading External Data Sources > Discovery Import Profiles and click “Add New Profile.”



Select the “Discovery” profile type and click Next to create the profile.



2. Set up the Profile Details.

Enter a profile name, description, data source code and label of your choosing. Then select the following options in the dropdowns.

Field	Value
Originating system	Other
Import Protocol	OAI
Physical source format	XML
Source format	Dublin Core

Uncheck the “Share with Network” checkbox. This option shares all harvested records with other Alliance institutions.

< Import Profile Details
1 2 3 4
Save Draft Cancel Next

Profile Details

Profile name * Archives West

Profile description Finding aids from Archives West.

Data Source Code * archiveswest

Data Source Label * Archives West

Originating system * Other

File name patterns

Import Protocol OAI

Physical source format XML

Source format Dublin Core

Target format Dublin Core

Status Active

Share with Network ☐

3. Set up Scheduling.

To schedule the harvesting job to keep records up to date, set the Scheduler status to “Active” and select your preferred times. Options will include 4 times per day, daily, weekly, or monthly.

Scheduling

Scheduler status ☒ Active ☐ Inactive

Scheduler * Every Saturday at 01:00

Email Notifications

Click “Email Notifications” if you wish to set up subscribers who will receive emails when harvesting jobs have completed.

4. Set up OAI-PMH.

In the OAI Details section, enter <https://archiveswest.orbiscascade.org/oai.php> in the OAI Base URL field. Leave the “Authentication” box unchecked.

Click “Connect and Edit.” More fields will appear below.

The screenshot shows the 'OAI Details' form. The 'OAI Base URL' field is filled with 'https://archiveswest.orbiscascade.org/oai.php'. The 'Authentication' checkbox is unchecked. The 'Connect and Edit' button is visible. The 'Repository Name' field is filled with 'Archives West'. The 'Earliest Date Stamp' field is filled with '02/07/2006 24:00'. The 'Granularity' field is filled with 'YYYY-MM-DD'. The 'Admin Email/s' field is filled with 'webmaster@orbiscascade.org'. The 'Metadata Prefix' field is filled with 'oai_dc'. The 'Set' dropdown menu is open, showing 'All Sets'. The 'Identifier Prefix' field is empty. The 'Harvest Start Date' field is filled with '02/07/2006 24:00'. The 'Encode Date' checkbox is unchecked. The 'Open Test Page' button is visible.

Click the “Set” dropdown to select a specific Archives West repository to harvest. If you want to harvest more than one set, but not all sets, you’ll need to set up a separate Discovery Import Profile for each one.

The screenshot shows the 'OAI Details' form with the 'Set' dropdown menu open. The dropdown menu lists the following sets: 'All Sets', 'Boise State University Library, Special Collections a', 'Central Oregon Community College (orbec)', 'Central Washington University, Archives and Specia', 'Confederated Tribes of the Siletz, Tribal Cultural Co', 'Eastern Washington University (wachene)', 'Everett Public Library, Northwest Room (wae)', 'George Fox University Archives (orngf)', 'Lane Community College Archives (orel)', and 'Lewis & Clark College, Special Collections and Arch'. The 'Look-up or select' search bar is visible at the bottom of the dropdown menu.

Click “Open Test Page” to make sure the import is working and see a sample record.

OAI Test

☐ Test By ID

☒ Test First Record

☐ Test Random Record

Test

Record Identifier

Status PASSED

Source Record<record xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"><header><identifier>80444/xv42037</identifier>

DC Record<?xml version="1.0" encoding="UTF-16"?><record xmlns:dc="http://purl.org/dc/elements/1.1/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"><dc:identifier>https://archiveswest.orbiscascade.org/ark:/80444/xv42037</dc:identifier>

Close

At the top of the page, click “Save Draft” to save your profile to come back to later, or “Next” to move on to Normalization Rules.

5. Set up Normalization.

The Archives West OAI-PMH records use [Generic Dublin Core](#) fields that will map to Primo fields by default. To use the default mappings, leave the Normalization section blank and click “Next.”

Primo	Dublin Core	EAD Path
Publisher	dc:publisher	Name from repository editor
Title	dc:title	archdesc/did/unittitle
Author	dc:creator	archdesc/did/origination/persname
Description	dc:description	archdesc/did/abstract
Format	dc:format	archdesc/did/physdesc/extent
Creation Date	dc:date	archdesc/did/unitdate
Language	dc:language	archdesc/did/langmaterial/language
Subjects	dc:subject	archdesc//controlaccess/subject[@source="lcsb"]

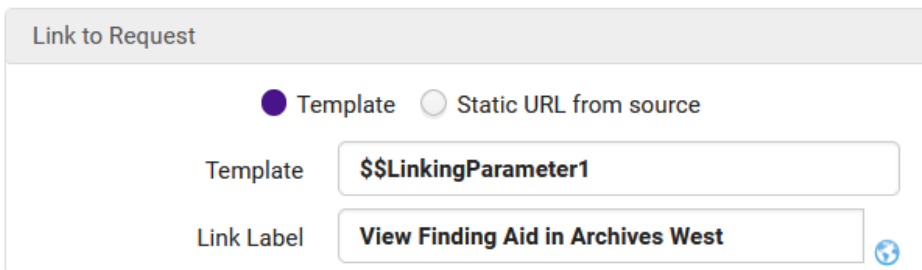
If you'd like to customize the display of Archives West records in your Primo VE instance, see [Configuring Normalization Rules for External Resources \(Primo VE\)](#).

6. Set up Delivery Links.

In the final Delivery tab, leave the “Link to Resource” section blank. Configuring a link here would treat Archives West records as electronic resources, and Primo would display them as “Full text available.”

Optionally add a custom thumbnail for Archives West records under “Link to Thumbnail [sic].”

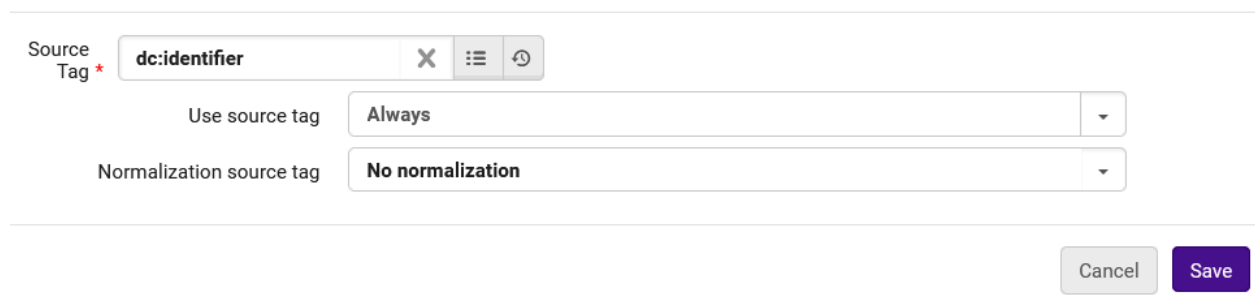
In “Link to Request,” leave “Template” selected. Enter “\$\$LinkingParameter1” into the Template field, and your preferred label in the Link Label field.



The screenshot shows the 'Link to Request' configuration form. At the top, there's a header 'Link to Request'. Below it, there are two radio buttons: 'Template' (selected) and 'Static URL from source'. Under the 'Template' section, there are two input fields. The first is labeled 'Template' and contains the text '\$\$LinkingParameter1'. The second is labeled 'Link Label' and contains the text 'View Finding Aid in Archives West'. To the right of the 'Link Label' field is a small globe icon.

Finally, under Linking Parameters, click the ellipsis button in the “LinkingParameter1” row and set the source tag to dc:identifier. Set “Use source tag” to “Always” and “Normalization source tag” to “No normalization.”

Edit LinkingParameter1



The screenshot shows the 'Edit LinkingParameter1' form. At the top, there's a 'Source Tag' field with a red asterisk, containing the text 'dc:identifier'. To the right of this field are three icons: a close button (X), a list icon (three horizontal lines), and a refresh icon (circular arrow). Below the 'Source Tag' field, there are two dropdown menus. The first is labeled 'Use source tag' and has 'Always' selected. The second is labeled 'Normalization source tag' and has 'No normalization' selected. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

At the top of the page, click “Save” to complete your discovery import profile.

7. Map the Dublin Core resource type to the Discovery resource type.

The value in dc:type for all Archives West records is archival_materials. This is an out-of-the-box resource type in Primo VE, but if it's not configured in your Dublin Core Type to

Discovery Type Mapping table, the default type of “Other” will override it. See [Using the Mapping Table to Map Resource Types](#).

Navigate to Configuration Menu > Discovery > Loading External Data Sources > Dublin Core Type to Discovery Type Mapping. If there is no entry for “archival_materials,” add a new row for it and save the table.

22	archival_materials	archival_materials
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8. Add the data source to your view.

Under Configuration > Discovery > Search Configuration > Search Profiles, open the Custom Local Data Scopes tab and create a custom scope. In the Scope Conditions section, add a condition for “Inventory: External data source” equal to the data source you set up in the discovery import profile.

[< Define a Custom Scope](#)CancelSave

Scope Details

Code *
archiveswest

Name *
Archives West

Description

Scope Population
☒ My Institution
☐ Entire Network

Scope Conditions

Clear Conditions

+ Add a Condition

-	External data source	Equals	Archives West	-
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In the Search Profiles tab, add your new scope to an existing profile or create a new one specifically for Archives West.

List of Scopes included in the Search Profile

Code	Name	Description
1	DiscoveryNetwo...	All Libraries
		All records within the Discovery Network

Select Scope Type *

Custom (Local data)

Select Custom Scope *

Archives West (archiveswest)

Add

Add and Close

If you create a new profile, add it to a new or existing slot for your view(s) under Configuration > Discovery > Display Configuration > Configure Views.

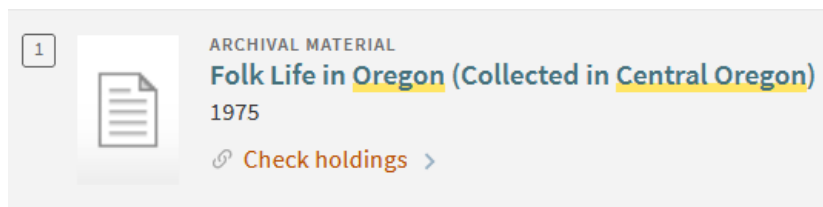
9. Run the import profile.

When your configurations are in place, navigate back to the Discovery Import Profiles and select “Run” in the ellipsis menu to harvest your records.

The initial job will set the Harvest Start Date of the profile to the job’s ending time, so subsequent jobs will harvest new or modified finding aids only. If you need to overwrite existing records, edit the profile and delete the Harvest Start Date before reloading.

10. Optionally add a customization to make links more noticeable.

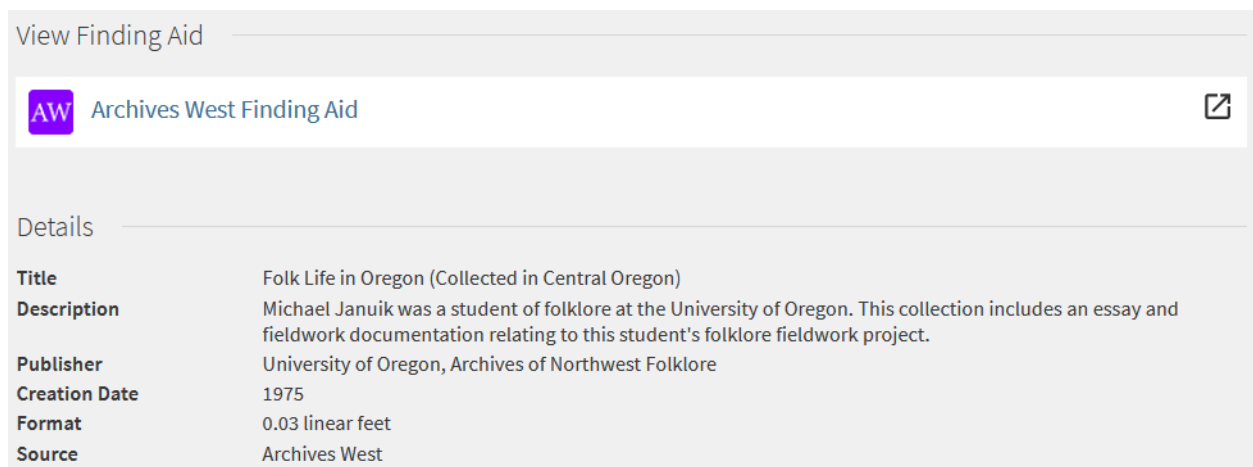
With these configurations, Archives West finding aids will display as physical resources with a “Check holdings” calculated availability label in brief search results.



The links to the finding aids will be in the Links section of full records, with other 856 entries.



To make this link more noticeable to patrons, you can add a customization to your local package to create a large button above the Details section of a full record.



The following code will accomplish this. Replace {VIEW CODE} in the image source URL with your view code, and place this image file in your package under /img: [aw-logo.png](#)

```
app.component('prmActionListAfter', {
  controller: function($scope) {
    this.isAW = false;
    this.url = '';
    this.$onInit = function() {
      var sourceId =
        $scope.$parent.$ctrl.item.pnx.control.originalsourceid.toString();
      if (sourceId.substring(0,8) == '80444/xv') {
        this.isAW = true;
        this.url = 'https://archiveswest.orbiscascade.org/ark:/' +
          sourceId;
      }
    }
  },
  template: '<div id="aw-link" ng-if="$ctrl.isAW"><div
    class="layout-align-center-center layout-row"><h4 class="section-title
    md-title light-text">View Finding Aid</h4><md-divider flex=""
    class="md-primoExplore-theme flex"></md-divider></div><a
    href="{{ $ctrl.url }}" target="_blank"> Archives West Finding Aid</span><md-icon
    md-svg-icon="primo-ui:open-in-new" role="presentation"
    class="md-primoExplore-theme" /></a></div>'
});
```

After adding this code within the anonymous function in custom.js, zip and upload your package to your view. See [Make Changes to Your Local Package in Primo VE](#) and other examples in the [Primo VE Toolkit](#).