

### ***An Introductory Note***

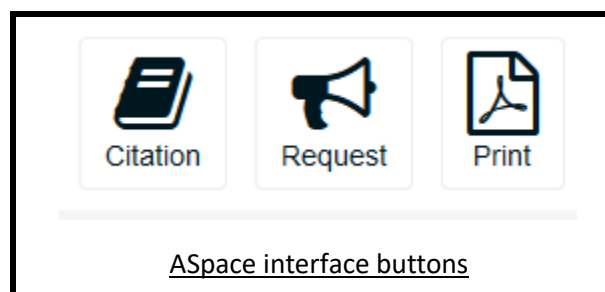
- Generally, the following is an account of the configuration undertaken at CSU Fullerton
- Other CSU's needs and preferences may vary, so this documentation may not fully apply to everyone

### ***Brief Overview Summary***

- The ArchivesSpace (ASpace) harvesting method is OAI
- The primary Alma functionality requiring configuration is a *Discovery Import Profile*
- Imported records *can* be transformed via Normalization Rules
- For these reasons, most campuses will benefit from collaboration between both Systems/Discovery/Programming and Cataloging/Metadata experts, along with liaison with your University Archives/Special Collections colleagues to discuss discovery and access preferences, etc.

### ***The CSUF Goal***

- To continue supporting discovery of ASpace records in Primo VE, following our successfully configured Primo pipe in 2018
- For typical users, these records serve chiefly as a bridge to the external ASpace catalog
- Access via requests, therefore, is designed to be provided by ASpace



### ***ASpace OAI Configuration***

- Undertaken by the CSUF Library programmer, David Palmquist
- Documentation: <https://archivesspace.github.io/tech-docs/customization/configuration.html>

### ***Some Initial Words of Reassurance?***

- The Discovery Import Profile configuration includes an OAI Test function (see below), which enables you to view both harvested source and DC records in Alma before activating the Discovery Import Profile
- Also, though of course not ideal and best avoided, imperfect imports do not tend to cause too much trouble. Alma has a dedicated Job 'Delete External Data Sources' which kindly cleans up messes.
  - The process does create Ghost Records, but these tend to flush within a few hours

## Alma Configuration Step One – firewall compliance

- Ensure both the ASpace OAI Base URL (e.g. <http://archives.fullerton.edu:8082/oai>) and Alma IP ranges are approved by IT regarding campus-wide firewalls - [Ex Libris Alma IP range documentation](#)

## Alma Configuration Step Two - Discovery Import Profile Configuration

- [Ex Libris documentation 'hub'](#)
- Alma: Discovery > Loading External Data Sources > Discovery Import Profiles
- There are three tabs: Profile Details; Normalization; and Delivery

### Import Profile Details

Profile Details

Normalization

Delivery

### Profile Details Tab

Profile Details

Profile name \*

Profile description

Data Source Code \*  Data Source Label \*

Originating system \*  File name patterns

Import Protocol

Physical source format

Source format  Target format

Status

Share with Network

**Note** – this is a demo Discovery Import Profile, the Status would be **Active** for a functional Profile

If you'd like to Schedule OAI harvesting from ASpace, this section will enable you to do so:

Scheduling

Scheduler status  Active  Inactive

Scheduler \*

## OAI Details

OAI Details

OAI Base URL \*

Authentication

Repository Name  Earliest Date Stamp

Granularity  Admin EMail/s

Metadata Prefix

Set

Identifier Prefix

Harvest Start Date

Encode Date

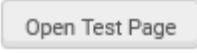
Click 'Connect and Edit' to set these field values

These are the available values for the 'Metadata Prefix' field:

Metadata Prefix	<input type="text" value="Look-up or select"/>
Set	<input type="text" value="oai_mods"/>
Identifier Prefix	<input type="text" value="oai_marc"/>
Harvest Start Date	<input type="text" value="oai_dc"/>
Encode Date	<input type="text" value="oai_ead"/>
	<input type="text" value="oai_dcterms"/>

And these are the available values for the 'Set' field. This determines the type of record you'd like to import:

Scheduler *	<input type="text" value="collection (collection)"/>
	<input type="text" value="file (file)"/>
	<input type="text" value="fonds (fonds)"/>
	<input type="text" value="item (item)"/>
	<input type="text" value="otherlevel (otherlevel)"/>
	<input type="text" value="recordgrp (recordgrp)"/>
	<input type="text" value="series (series)"/>
	<input type="text" value="subfonds (subfonds)"/>
	<input type="text" value="subgrp (subgrp)"/>
	<input type="text" value="subseries (subseries)"/>
	<input type="text" value="Look-up or select"/>

- The Open Test Page button  launches the 'OAI Test' which temporarily harvests single records and allows you to view them in Alma.
  - You can select between 'Test by ID' (requires known ID's, of course)
  - Test First Record
  - Test Random Record

## OAI Test

Test By ID  
 Test First Record  
 Test Random Record

Record Identifier	
Status	<b>PASSED</b>
Source Record	<pre>&lt;record&gt;   &lt;header&gt;     &lt;identifier&gt;oai:archivesspace//repositories/5/archival_objects/5308&lt;/identifier&gt;     &lt;datestamp&gt;2021-07-20T22:10:52Z&lt;/datestamp&gt;</pre>
DC Record	<pre>&lt;?xml version="1.0" encoding="UTF-16"?&gt;&lt;record xmlns:dc="http://purl.org/dc/elements/1.1/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"&gt;   &lt;dc:publisher&gt;University Archives and Special Collections&lt;/dc:publisher&gt;   &lt;dc:publisher&gt;California State University, Fullerton&lt;/dc:publisher&gt;</pre>

### Normalization Tab

- Here you can select previously-configured Norm Rules that you'd like to apply to your harvested records in order to transform them
- **Norm Rules** are created in the Alma Metadata Editor, and must be associated with a Normalization Process (if this sounds mysterious, your cataloging/metadata expert colleague will know all about this)
- We'll take a look at this in a moment, but our single Norm Rule is designed to enable the creation of a **Local Resource Type**

### Delivery Tab

- The meaning of 'delivery', in this context, is basically user discovery and access (i.e. resource delivery to the user)
- CSUF, as mentioned above, want our OneSearch records to redirect users out to ASpace via an access URL in VE's *Additional Services* section. So, we have configured the *Link To Request* functionality
- If we analyze the OAI Test, we can see that dc:identifier will do nicely! However, the harvested records contain **two** dc:identifier fields

<dc:identifier> [http://archives.fullerton.edu/repositories/5/archival\\_objects/5302](http://archives.fullerton.edu/repositories/5/archival_objects/5302) </dc:identifier> and  
 <dc:identifier> oai:archivesspace//repositories/5/archival\_objects/5303 </dc:identifier>

```

<?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:publisher>University Archives and Special Collections</dc:publisher>
  <dc:publisher>California State University, Fullerton</dc:publisher>
  <dc:identifier>http://archives.fullerton.edu/repositories/5/archival_objects
/5303</dc:identifier>
  <dc:creator>Dick, Philip K. (Philip Kindred), 1928 - 1982</dc:creator>
  <dc:creator>Philip K. Dick Society</dc:creator>
  <dc:title>Holy Quarrell. 36 leaves (copy), May 1966</dc:title>
  <dc:date>1959 -- 1985</dc:date>
  <dc:format>16 boxes</dc:format>
  <dc:language>eng</dc:language>
  <dc:description>Correspondence, manuscripts, and documents relating to the life
and works of Science Fiction author Philip K. Dick gifted to the Pollak Library from
various sources.</dc:description>
  <dc:identifier xml:lang="eng">oai:archivesspace//repositories/5/archival_objects
/5303</dc:identifier>
</record>

```

- To solve this potential problem, we have configured a LinkingParameter, which both specifies a Source Tag from which to harvest the access URL, *and* specifies a matching string using regex. All this, therefore, ensures that the access url is populated from the dc:identifier field containing the http:// address, rather than the oai: address

**Link to Request**

Template
  Static URL from source

Template:

Link Label:

## Edit LinkingParameter1

Source Tag \*  ✕ ☰ ↻

Use source tag:

Matching String:

Normalization source tag:

- The 'Link Label' field is self-explanatory, and creates an access link in VE that looks like this:

### Additional Services

[To Request - Connect to CSUF ArchivesSpace](#) 🔗 >

### Alma Configuration Step 3 (optional) – Normalization Rules

- As noted above, we created a Normalization Rule and corresponding Normalization Process to enable the creation of a [Local Resource Type](#), which is much-loved by our UA&SC colleagues for the information seeking assistance it gives to our users
- Let's take a quick look at the Norm Rule **CSUF set dc:source for ArchivesSpace**

```
rule "CSUF set dc:source for ArchivesSpace"
```

```
when
```

```
TRUE
```

```
then
```

```
set "University Archives (ArchivesSpace)" in "dc"."source"
```

```
end
```

- This will simply add a dc:source field to each record passing through the Discovery Import Profile, along with a value "University Archives (ArchivesSpace)"
- Do remember that in order to be invoked by a Discovery Import Profile, a Norm Rule has to be associated with a Normalization Process – ExL documentation: [Norm Rules](#) and [Norm Processes](#)

### Alma Configuration Step 4 (optional) – Local Resource Type

Rationale: VE possesses the OOTB resource types 'Archival Materials' and 'Archival Material/Manuscripts'. Useful, but even better for our users (and our UA&SC colleagues) would be a local resource type **University Archives (CSUF)**. The aim is to only assign this local resource type to records imported from ASpace.

Alma Configuration > Discovery > Display Configuration > Local Resource Types

- As we've seen, our Norm Rule & Norm Process created a dc tag and data value that is 100% unique to imported ASpace records
- This therefore creates a simple condition upon which to assign our Local Resource Type:

[Edit Local Resource Type](#)

General

Code *	<input type="text" value="UA"/>	Active	<input checked="" type="checkbox"/>
Display Singular Label *	<input type="text" value="University Archives (CSUF)"/>	Display Plural Label *	<input type="text" value="University Archives (CSUF)"/>
RIS type	<input type="text" value="Manuscript"/>	Genre	<input type="text" value="Unknown"/>
Metadata format	<input type="text" value="Patent"/>		

Mapping from MARC records

No records were found.

Mapping from Dublin Core

1 - 1 of 1

Logic	Dublin Core tag	Value in Dublin Core
1 -	dc:source	University Archives (ArchivesSpace)

- Now, when conducting information seeking tasks in OneSearch, Library users can isolate CSUF archival holdings via a simple, one-step process

**Resource Type** ^

- Books (14,149)
- Video (959)
- University Archives (CSUF) (713)**
- DVDs (192)
- Journals (191)

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