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# Creating Custom Search Scopes and Making Them Available in Primo VE

Presented by:

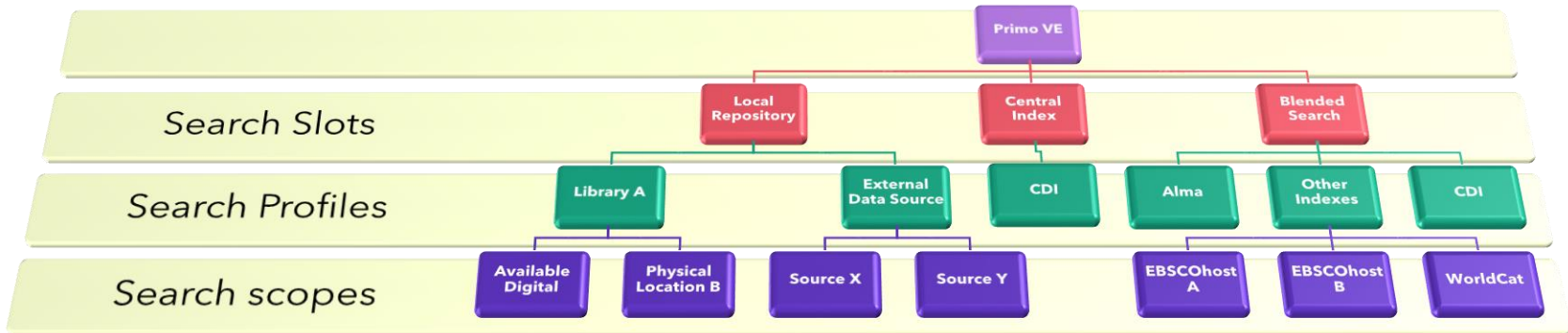
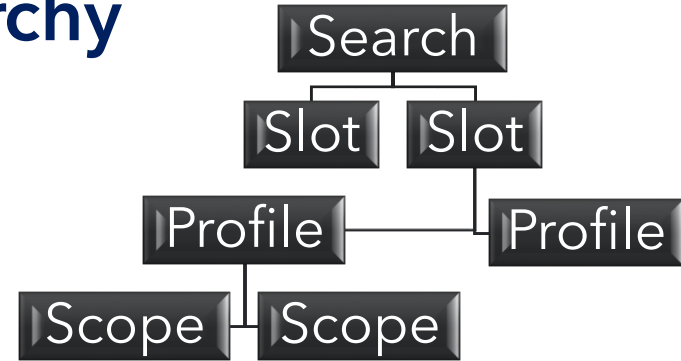
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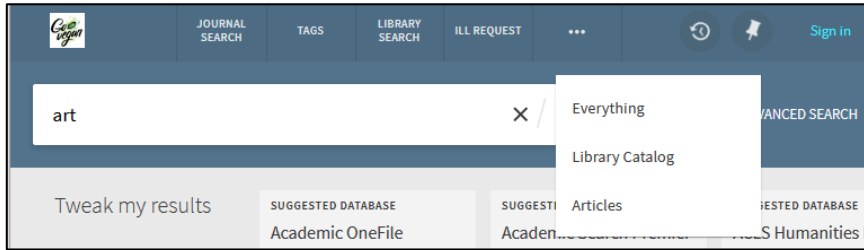
# Agenda

- ❖ Terminology and Hierarchy
- ❖ Remote Search Indexes
- ❖ Search Scopes
- ❖ Search Profiles
- ❖ Search Slots

# Search Configuration Hierarchy



# Pre-defined Slots & Profiles














View Configuration

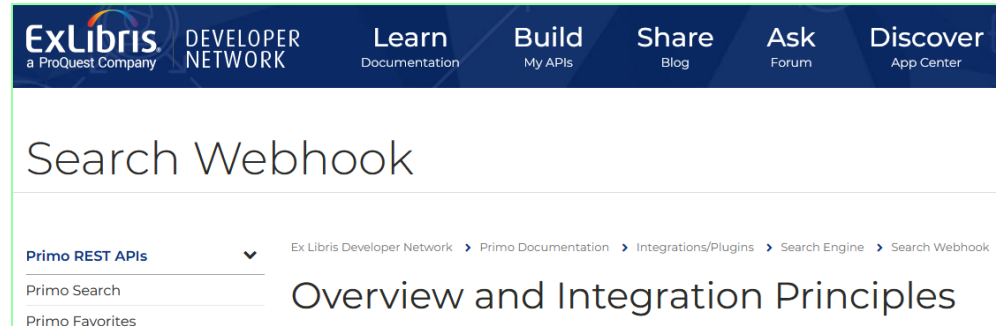
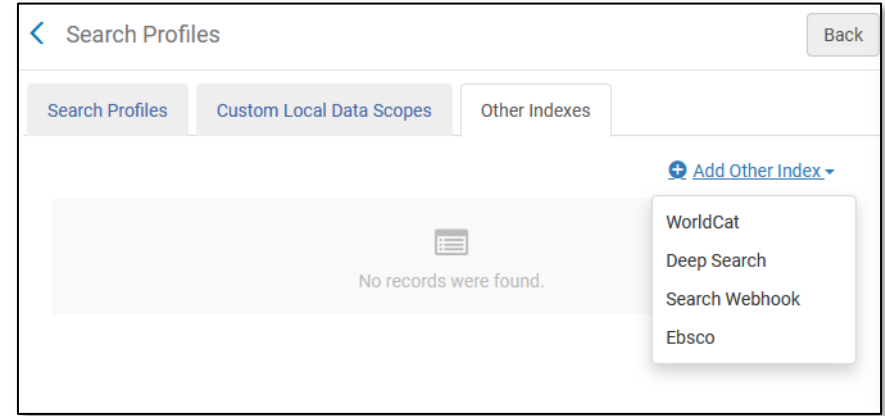
General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display

1 - 6 of 6

	Active	Code	Name	Description	Search Profiles
1	<input checked="" type="checkbox"/>	Everything	Everything	Local data and Central Index	MyInst_and_CI
2	<input checked="" type="checkbox"/>	LibraryCatalog	Library Catalog	Local data only	MyInstitution
3	<input checked="" type="checkbox"/>	CentralIndex	Articles	Central Index only	CentralIndex

# Other Indexes

	Manage display and local fields	<b>Publishing</b>
	Local Resource Types	Publishing Profiles
	Manage Tags	<b>Other</b>
	Hypertext Linking Definitions	Mapping Tables
	Thumbnail configuration	Resource Recommender Configuration
	Labels	Central Index and proxy set-up
	Multi-lingual Configuration	Primo Deep-Link Re-Direct Configuration
	<b>GetIt Configuration</b>	Suppress Dedup/FRBR
	Digitization Request	Dedup and FRBR Test Utility
	Hold and Booking Request	Customer Settings
	Purchase Request	URL Mapping
	Resource Sharing Request	Citations Styles
	Items Display configuration	Local Fields using Search and Facet
	Holdings Display Labels	Normalization Rules
	Holdings Display Configuration	Primo VE Deep Search Configuration
	Primo View to Libraries	Exclude Process Types from Discovery
	Library Card Configurations	Indexing



# EbscoHost API

- No support for 'starts with'
  - No support for Language prefilter
  - No record counts for facet values
  - Only facets supported by EBSCOhost will display
- Configure EBSCO index scopes in separate Search Profiles - not blended with local or CDI scopes



# Local Custom Scopes

Search Profiles

Custom Local Data Scopes

1 - 10 of 10

+ Add a Custom Scope

	Other Index code	Other index name	Description	
1	abc	abc	-	...
2	all_no_CR	all_no_CR	-	...

Define a Custom Scope

Cancel Save

Scope Details

Code \*

Name \*

Description

Scope Conditions

+ Add a Condition

No conditions have been defined

Up to three conditions can be defined

Search Index

Look-up or select

- Metadata : Creator
- Inventory : Is Part of collection/sub-collection
- Inventory : Available Electronic
- Metadata : Full Text
- Inventory : Location
- Inventory
- Local Fields
- Metadata

# Local Custom Scopes

- The available fields for **MARC21** are: 009, 09X, 490, 5XX, 69X, 9XX
- The available fields for **UNIMARC** are: 3XX, 6X9, 69X, 9XX

Define a Local Field

Field to edit \* local\_field\_01

Display label \* Technical Reports

Local field details

Enable field for search

Use the parallel Local Field 01/50 from the Dublin Core record

Enable field for facet

Use full text links for indexing

Use Translations

MARC21 Fields

1 - 1 of 1

+ Add MARC21 Fields

MARC21 Field
1 500



# Scope conditions

1 AND 2 OR 3  $\Rightarrow$  (1 AND 2) OR 3

1 OR 2 AND 3  $\Rightarrow$  1 OR (2 AND 3)

# Search Profiles

Define a Custom Search Profile Cancel Save

Search Profile Details

Code \*

Display Name \*

Description

List of Scopes included in the Search Profile + Add Scope

No scopes have been selected

Select Scope Type \*

- Look-up or select
- My Campuses
- My Libraries
- Custom (Local data)
- Other Indexes
- My Entire Institution
- Central Index

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Search Profiles Back

Search Profiles Custom Local Data Scopes Other Indexes

+ Add a Search Profile 🔗 ⚙️

Code	Display Name	Search type	Description	
1 CentralIndex	Articles and more	Central Index	All records within your Central Index profile	...
2 CourseReserves	Course Reserves	Local Data	All records linked to an active course	...
3 CS_Uptown	uptown	Local Data	-	...

# Search Slots

View Configuration Back

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services Manage Customization Package

1 - 6 of 6 + Add a Slot

Active	Code	Name	Description	Search Profiles		
<input checked="" type="checkbox"/>	Everything	Everything	Local data and Central Index	MyInst_Land_CI	▼	⋮
<input checked="" type="checkbox"/>	LibraryCatalog	Library Catalog	Local data only	Myinstitution	▼	⬆ ⋮
<input checked="" type="checkbox"/>	CentralIndex	Articles	Central Index only	CentralIndex		⬆ ⋮

← Edit Profile Slot Cancel Save

TR\_INTEGRATION\_INST:GoVE ▼

View Name Go Primo VE Slot code -

Define Slot ▼

Code \*  Name \*  ⊕

Description  Tooltip  ⊕

Select Search Profiles for slot ▼

1 - 12 of 12 ⊕

Activ	Code	Name	Description	Profile Type	
1 <input type="checkbox"/>	external_...	External Records	-	Local Data	⋮
2 <input type="checkbox"/>	Test	Lib_test	-	Blended	⋮

# Restricted Search Groups

Restricted Search Groups

1 - 2 of 2 [+ Add Restricted Search Group](#) [🔗](#) [⚙️](#)

Code	Name	Description	Definition	
1 all_records	All Records	-	And "MDA test" Contains Keywords "*"	...
2 test	test	-	"Additional title" Contains Keywords "test"	...

Restricted Search Group Definition [Cancel](#) [Save](#)

Details

Code \*  Name \*

Description

Restricted Search Conditions [Clear Conditions](#) [+ Add a Condition](#) [⚙️](#)

Logic	Search Index	Operator	Value	
1 -	Available Digital	Exists	-	...

Allowed users [+ Add Rule](#) [🔗](#) [⚙️](#)

Filter : All

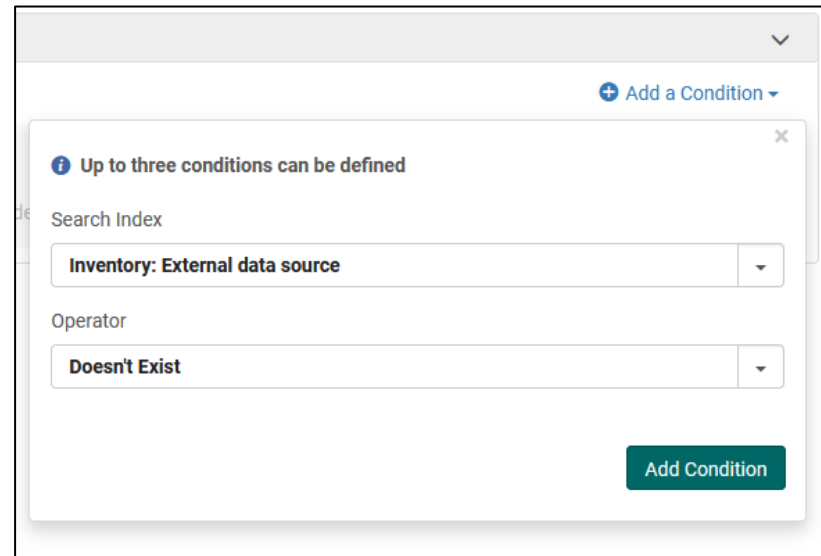
Enabled	Rule Name	Description	Updated By	Update Date	
1 <input checked="" type="checkbox"/>	MyGroup	-	Staff, Ex Libris	26-Oct-2020	...

# MyInstitution OTB search profile

**Q:** We have a local data scope for an external data source we imported to Primo VE. When we try adding it to the pre-defined MyInstitution profile, we get this message: My Entire Institution and Local Data scope/s cannot be included together in the same Search Profile.

# Alma scope

**Q:** How can we have a search profile containing our Alma repository but without imported data sources?



The screenshot shows a configuration window for search conditions. At the top right, there is a link to '+ Add a Condition'. Below this, a message states 'Up to three conditions can be defined'. The configuration is set for 'Search Index' with the value 'Inventory: External data source' and the 'Operator' set to 'Doesn't Exist'. A green 'Add Condition' button is located at the bottom right of the configuration area.

# CDI scope

**Q:** How do I determine whether CDI records with no available full text initially appear in the search results?

+

Add Scope ▾

Select Scope Type \*

Central Index ▾

Filter by Availability

Add Add and Close

Search Profile Details ▾

Code \* MyInst\_and\_CI Display Name \* Search everything

Description Blended - All records belonging to your instit

List of Scopes Included in the Search Profile

+ Add Scope ▾

Code	Name	Description	<input checked="" type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks	All CDI resource types	All CDI disciplines	Search in FT: No (Always)	...
1. CentralIndex	Central Index	All records within your Central Index profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All CDI resource types	All CDI disciplines	Search in FT: No (Always)	...
2. MyInstitution	My Institution	All records belonging to your institution	<input type="checkbox"/>	<input type="checkbox"/>				...