



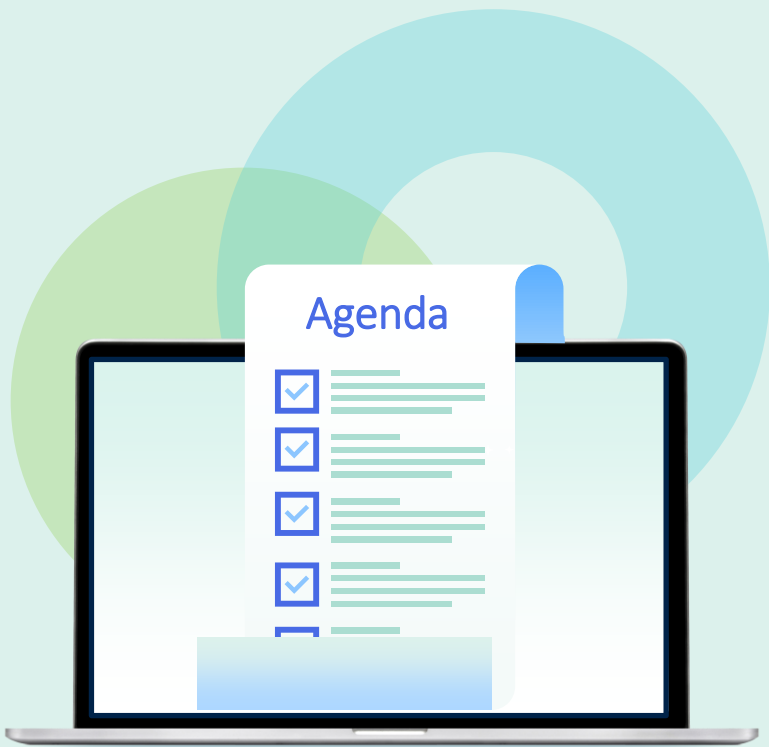
# Creating Custom Search Scopes and Making Them Available in Primo VE

Jenny Draeger — Senior Team Lead, Customer Education

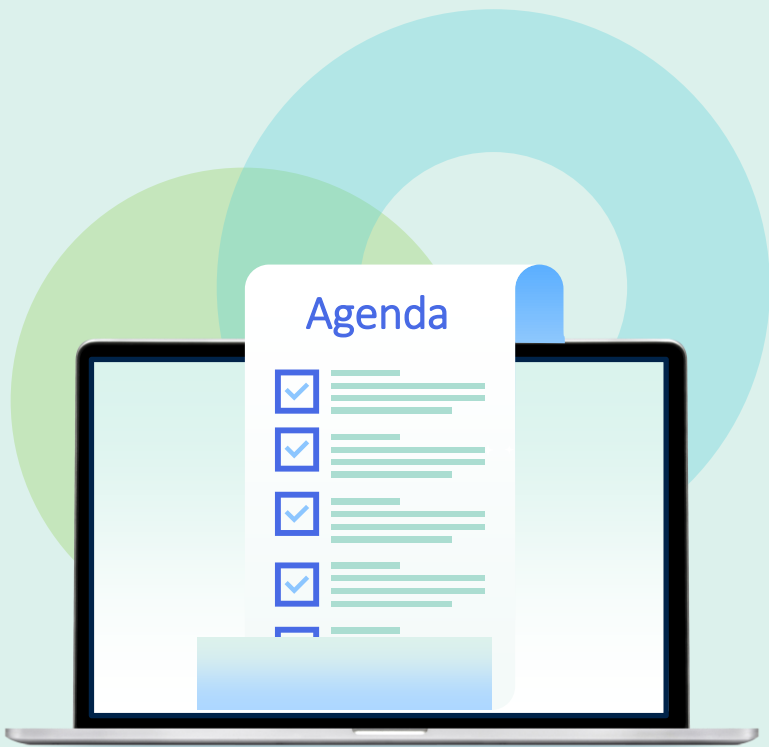
Chris Dixon — Technical Support Analyst

EX LIBRIS  
*Knowledge Days*

ExLibris®  
Part of Clarivate



- Search Profiles
- Search Profile Slots
- Search Scopes
- Create a Custom Search Scope
  - Local Data
  - CDI
- Create a Search Profile
- Create a Search Profile Slot



- **Search Profiles**
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# Search Profiles

- Define groups of records that meet specific conditions
- Out-of-the-box search profiles

Search Profile	Records included in Search Profile
Central Index	Collections from the CDI
Course Reserves	Records linked to an active course
MyInst_and_CI	All resources in institution and CDI
MyInstitution	All resources in institution
DiscoveryNetwork*	All resources in your institution and other member institutions in the network
DN_and_CI*	All resources in your institution, other member institutions, and the CDI

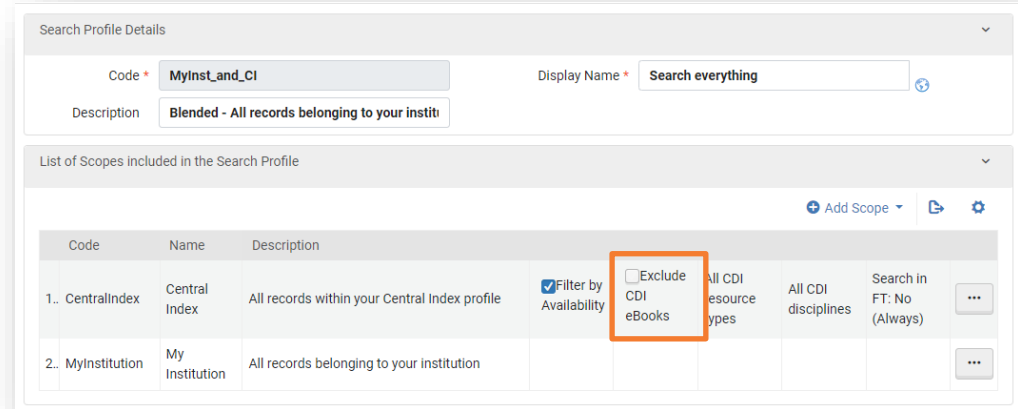
\*If part of a collaborative network

# Blended Search Profiles

## Exclude CDI eBooks—

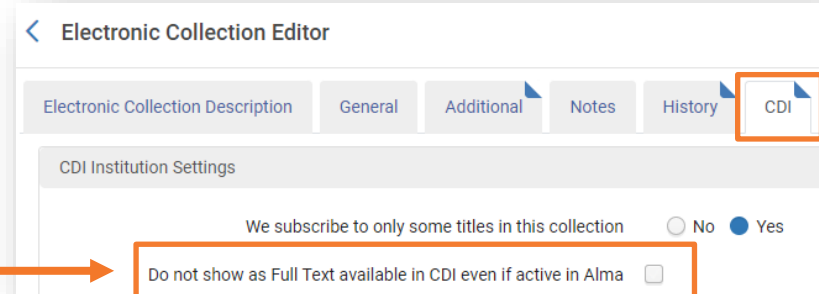
### Excluded from search results

- CDI books for all collections that have portfolios in Alma



### Included in search results

- Local eBook records in Primo VE local index
- Chapter level records from the CDI (Do not show... option in the Electronic Collection Editor is unchecked/disabled)



# Search Profiles That Include the Central Index

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

Filter by Availability—display only CDI records that have full text

- Filtered search is the default in Primo VE
- Users can switch to expanded search

## FT Search Configuration

- Yes, Always—search queries check for full-text matches in CDI
- Yes, Per end-user selection—users have option to override setting
- No, Always—search queries never check for matches in CDI (default)
- No, Per end-user selection—users have option to override setting

# Search Profiles that include the Central Index

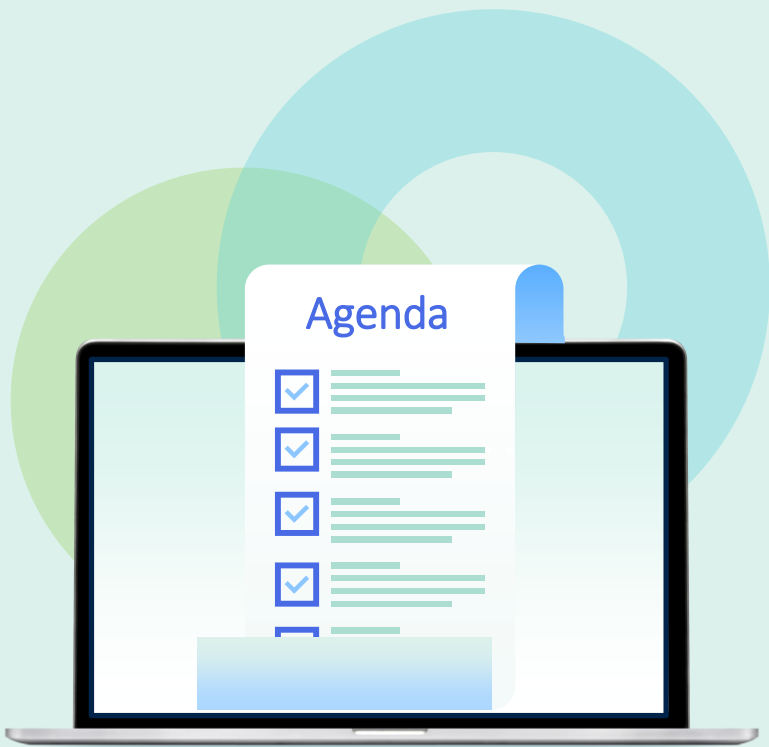
Code	Name	Description	<input checked="" type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks	All CDI resource types	All CDI disciplines	Search in FT: No (Always)	...
1	CentralIndex	Central Index	All records within your Central Index profile					

## Resource Type selection

- All –no limit on specific resource types
- Selected resource types
  - Limit search to resource types defined in search profile
  - Maximum of five resource types

## Discipline selection

- All—no limit to specific disciplines
- Selected CDI disciplines
  - Limit search to disciplines defined in the search profile
  - Maximum of five disciplines



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# Search Profile Slots

*Discovery > Display Configuration > Configure Views >  
Edit > Search Profile Slots tab*

- Appear in Primo VE
- Default Search Profile Slots are assigned when a new view is created

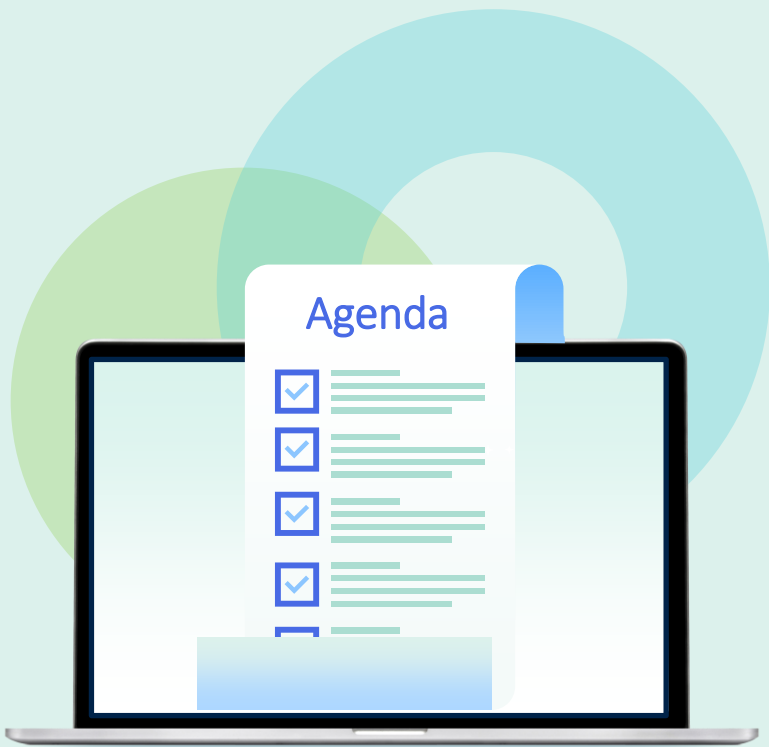
The screenshot displays the 'Search Profile Slots' configuration page in the ExLibris interface. The page has a navigation bar with tabs: General, Links Menu, Search Profile Slots (selected), Advanced Search Configuration, Brief Results, Brief Record Display, and Full Record Ser. Below the navigation bar is a 'Manage Customization Package' section. A table lists 5 search profiles, with the first three highlighted by an orange box. To the right, a preview of the search results for the 'science' slot is shown, also with an orange box highlighting the results.

Active	Code	Name	Description	Search Profiles
<input checked="" type="checkbox"/>	Everything	Everything	Local data and Central Index	MyInst_and_CI
<input checked="" type="checkbox"/>	LibraryCatalog	Library Catalog	Local data only	MyInstitution
<input checked="" type="checkbox"/>	CentralIndex	Articles	Central Index only	CentralIndex
<input type="checkbox"/>	Research	Research	Research Resources	Research
<input type="checkbox"/>	CourseReserves	Course Reserves	Resources related to courses	CourseReserves

1 - 5 of 5 [+ Add a Slot](#)

science

- science  Everything
- science  Library Catalog
- science  Articles



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# Search Scopes

- Building block(s) of a Search Profile

Search Profile Details

Code \*  Display Name \*

Description

List of Scopes included in the Search Profile

Code	Name	Description
1	CentralIndex	Central Index All records within your Central Index profile
2	MyInstitution	My Institution All records belonging to your institution

Search Profile Details

Code \*  Display Name \*

Description

List of Scopes included in the Search Profile

Code	Name	Description
1	MyInstitution	My Institution All records belonging to your institution

# Types of Search Scopes

## Out-of-the-box Search Scopes

- Campuses
- Libraries
- My Entire Institution
- Central Index

## Other Indexes—must be configured

- Third party (WorldCat, EBSCO)
- Automated Fulfillment Network (AFN)

## Custom (local data)—must be configured



# Custom (Local Data) Search Scopes

- Do not include CDI records
- Physical, electronic, and digital inventory managed in Alma
- Records loaded from an external source into Primo VE

## For Consortia

- Physical, electronic, digital inventory from the entire network

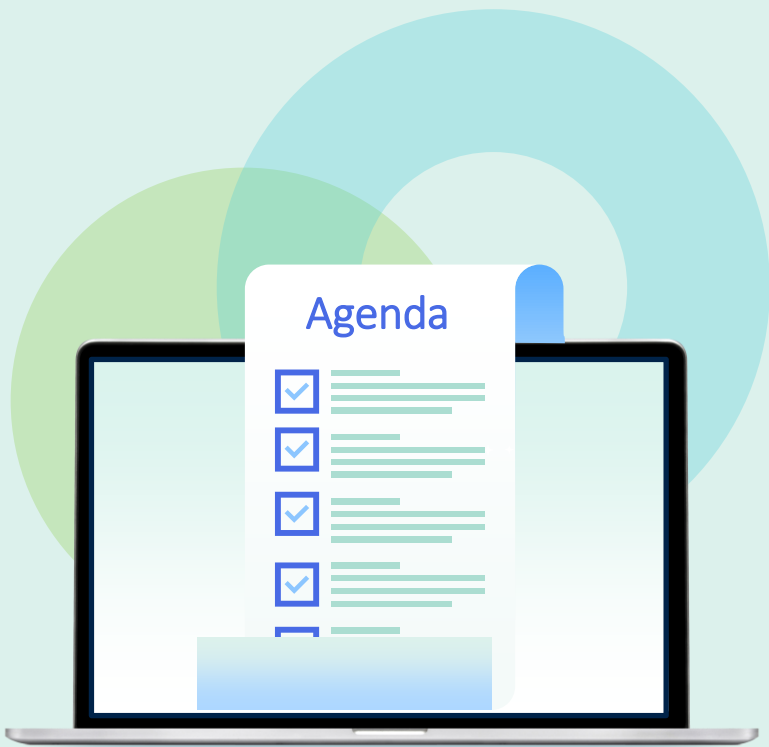


# Examples of Custom Scopes

- Books
- Journals
- Electronic Resources
- Materials in a particular library or collection
- Records imported from external digital asset manager

Any other ideas?





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# Custom Local Data Search Scopes

*Discovery > Search Configuration > Search Profiles >  
Custom Local Data Scopes tab*

The screenshot shows the 'Search Profiles' interface. At the top, there is a 'Back' button. Below it, there are three tabs: 'Search Profiles', 'Custom Local Data Scopes' (which is highlighted with an orange border), and 'Other Indexes'. The main content area shows '1 - 2 of 2' items. On the right side of this area, there is a button labeled '+ Add a Custom Scope' (highlighted with an orange border) and two icons: a document icon and a gear icon. Below this is a table with the following data:

	Other Index code	Other index name	Description	
1	EXTERNAL	External Records	-	...
2	MAPS_CHINA	Chinese Maps	Collection of Chinese maps	...



# Specialized Search Scopes for CDI

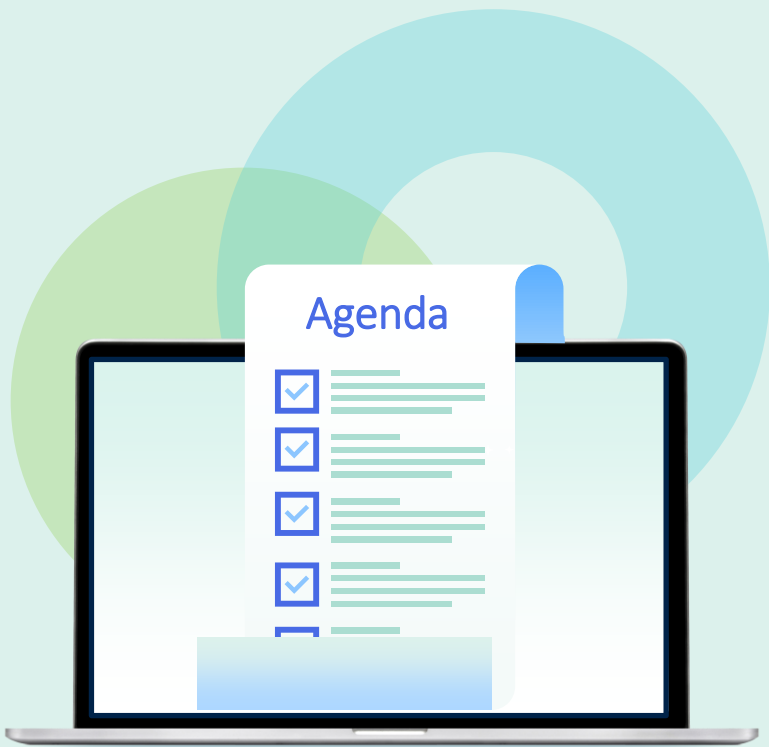
*Discovery > Search Configuration > Search Profiles >  
Search Profiles tab*

Search Profiles

Search Profiles Custom Local Data Scopes Other Indexes

+ Add a Search Profile

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



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# Create a Search Profile

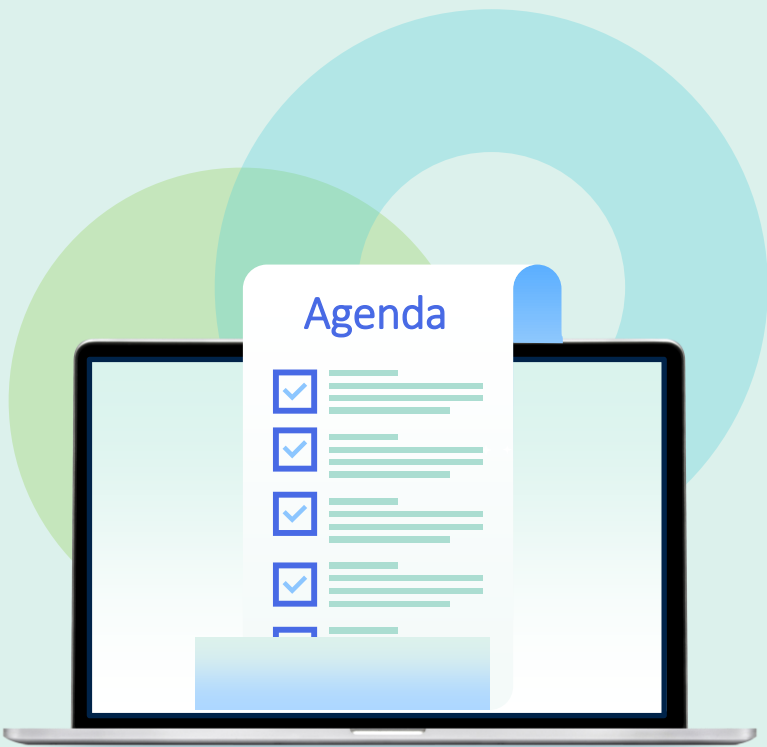
*Discovery > Search Configuration > Search Profiles >  
Search Profiles tab*

Search Profiles

Search Profiles Custom Local Data Scopes Other Indexes

+ Add a Search Profile

Code	Display Name	Search type	Description	
1. AFN	AFN	Other Index	-	...
2. CentralIndex	Articles and more	Central Index	All records within your Central Index profile	...
3. CourseReserves	Course Reserves	Local Data	All records linked to an active course	...
4. GRAD	Graduate Library	Local Data	-	...
5. LAW	Law Library	Local Data	-	...



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# Create a Search Profile Slot

*Discovery > Display Configuration > Configure Views > Edit > Search Profile Slots tab*

View Code TRAINING\_2\_INST:SCIENCE

View Name Science Library

General Links Menu **Search Profile Slots** Advanced Search Configuration Brief Results

Brief Record Display Full Record Services Manage Customization Package

1 - 5 of 5 + Add a Slot

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"/>	LibraryCat...	Library Catalog	Local data only	MyInstitution	...
3	<input checked="" type="checkbox"/>	CentralIndex	Articles	Central Index only	CentralIndex	...



# Resources

# Documentation and Resources

- [Configuring Search Profiles for Primo VE](#)



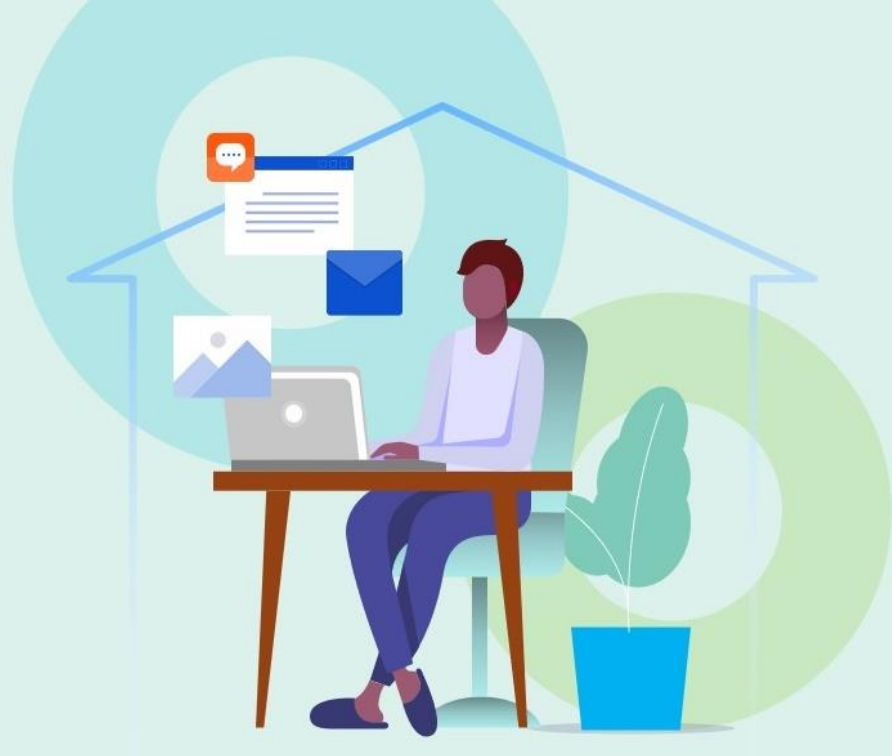
The survey for this session can be accessed via the QR code or URL

# Thank you!

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*Knowledge Days*



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