Primo VE Administration
Search Configuration

Hello! Search allows users to find what they are looking for in Discovery based on their search terms and any other selected facets. As an administrator, you are able to configure the options that are displayed in the user interface.

When a user performs a search in Discovery, they can select a slot to search within. And if there is more than one profile configured for it, they can select a Search Profile. Each of these Search Profiles are a group of search scopes.

In this session you will learn how to configure search scopes, profiles, and slots; how to configure both basic and advanced search, and how to configure facets and sort.

Scopes are groups of records that meet specific conditions, such as a specific resource type or library, a location in a library, or available electronic inventory. Search Profiles are the containers for one or more scopes and are used to search in Primo VE and must contain at least one scope. These Search Profiles can then be grouped together in a Slot.

In Primo VE Search Profiles are displayed as slots when a patron searches for an item, which they can select to search within. For example, if you search for “information technology” you can choose to search in a particular slot. In this case you’ll select Alma University & Central Index. When the results page loads, you can see the scope menu to the right of your search terms in the persistent search bar.

To configure each, in Alma, of these you’ll go to Discovery > Search Configuration > Search Profiles. This will bring you to the page of Search Profiles already configured in your system. The Search Profiles tab lists all the profiles configured at your institution. Custom Local Data Scopes allow you to create scopes that limit searches in the local database to specific library metadata, such as resource type or availability.

This is useful if you have a special collection that does not have its own library. You can create a special collections scope, and then list them with a Search Profile. And the Other Indexes tab allows you to limit searches to third-party search indexes. After an index has been defined, you can add it to a Search Profile.

By default, Primo VE is preconfigured with several profiles including: All catalog records, Central Index records, a profile that includes all records at your institution and the Central Discovery Index, and Course Reserves.

If you want to edit an existing profile, you can click the row action tool and select Edit. However, please note, that we recommend that you do NOT edit an existing out-of-the-box profile. In this case you need to create a new profile, so you’ll click Add a Search Profile. You are only required to add a Code and Display Name. The globe icon allows you to assign translated display names for this profile.

Now you’ll add your scopes. Click Add Scope. In the Select Scope Type drop-down you’ll see a list of available campuses and libraries. If you had created a new scope in the Custom Local Data Scopes tab you would be able to find it under Custom (Local Data). In this case you’ll select My Libraries, since you’re creating a scope for the Science Library at your institution. Next, you’ll select the Science Library from the second drop down menu. If you want to continue adding libraries, click Add, otherwise click Add and Close. Click Save when you’re done. And here’s your new Search Profile.

Next, let’s look at how basic and Advanced Search options are configured. Start by navigating to Discovery > Display Configuration > Configure Views. Open the row action tool of the View you want to edit and select Edit.

Basic Search options are configured in the Search Profile Slots tab. This lists all the slots that will display when a user enters a search term in the search box. You can toggle whether they are active or not and change the order in which they display by using the arrows. For more information about how to configure Slots, please watch the View Configuration session in the Knowledge Center.

Now you’ll click the Advanced Search Configuration tab to configure the Advanced Search options. Here you can see each of the sections of the Advanced Search menu that are displayed and their contents.

Within each you can toggle individual fields off and rearrange them by using the arrows. If there is a row action tool you have the options to Edit or Delete. The Enable For Basic Search checkbox will add prefilters to the basic search under the persistent search bar. Any changes you make here are saved automatically.

If a section appears to not be editable click Customize at the top right of the section, and then scroll back down. As you can see the Languages can now be edited.

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How results can be faceted and sorted is configured under the Brief Results tab. Facets can be toggled on and off, and you can change their order by using the arrows.

Values to display is how many of that type will be shown without expanding the facet, and the Sort Type determines how items within a facet will be sorted. Use the drop-down arrows to make changes to either of these.

Now you know how to configure search scopes, profiles, and slots; as well as how to configure both basic and advanced search, and how to configure facets and sort. Thanks for watching!