



Primo Scopes

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ExLibris
a ProQuest Company



Agenda

- Local and Remote Resources
- Scopes in the Front End
- Scopes in the PNX
- Scopes in the Normalization Rules
- Scopes in the Scope Values
- Exercise

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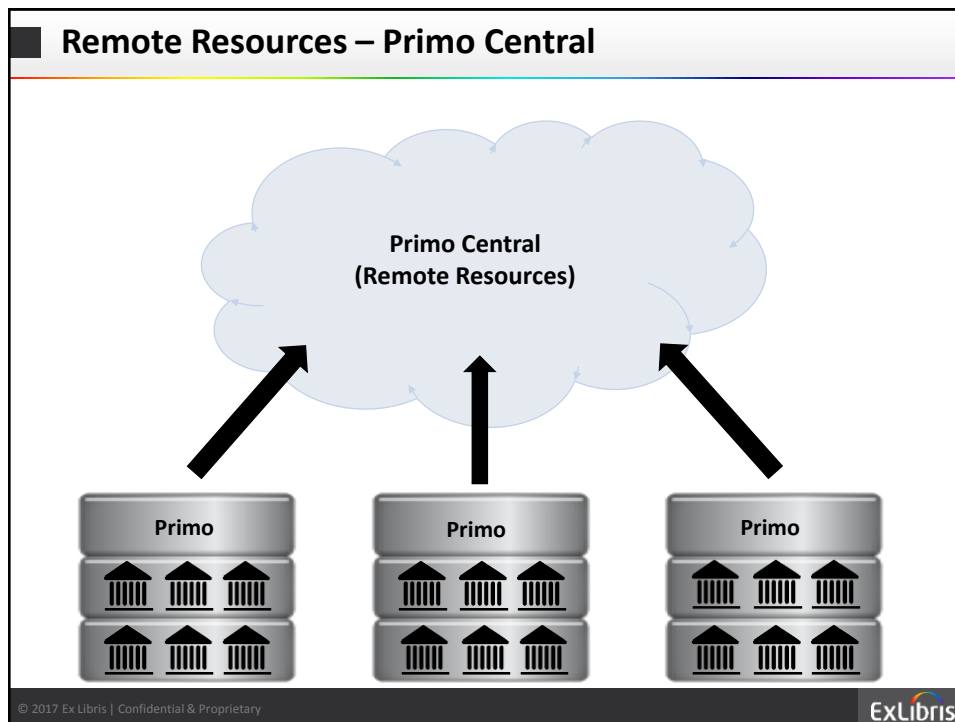
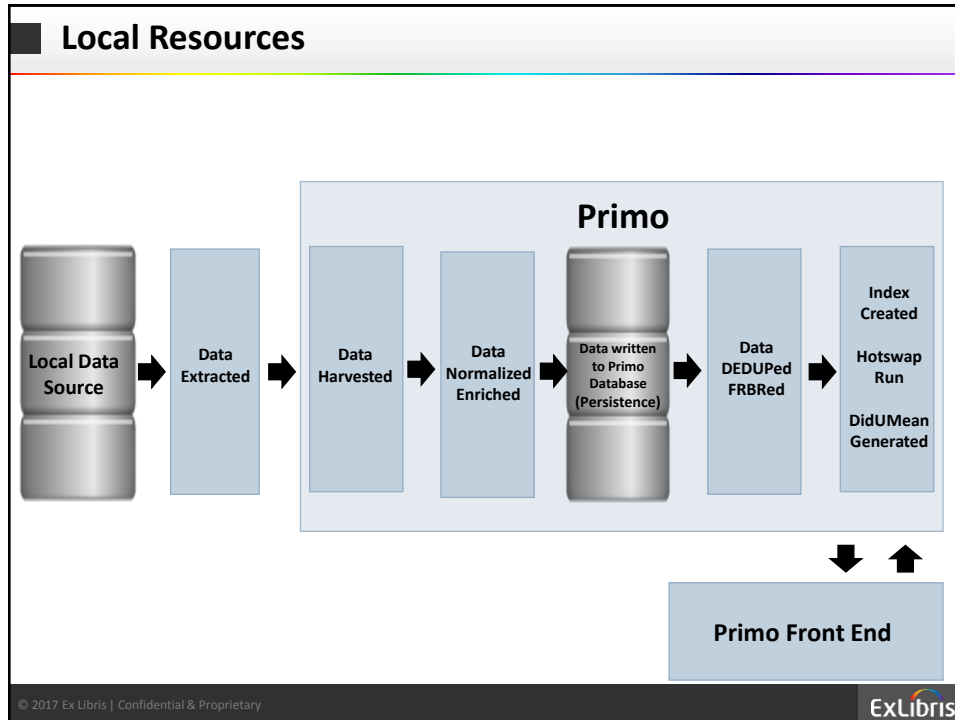
Local and Remote Resources



Primo Front End

Local Resources
Your ILS
Local digital repositories

Remote Resources
Primo Central
EBSCO, WorldCat



Local and Remote Resources Summary

Local Resources

- Your data is transformed into PNX via the publishing process
- Can customize normalization process
- PNX viewable in web browser and PNX viewer

Primo Central

- Records are also in PNX
- Records are processed at a global level (i.e. not customizable)
- PNX viewable in web browser



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Front End Scopes – DEMO

Scopes

- Scopes – records grouped for searching
- Local resource scopes can be configured in scope values, normalization rules, and views wizard
- Remote resource scopes are only configurable by data source (i.e. Primo Central, EBSCO API, MetaLib Quicksets)
- Common scopes
 - By Source (local and remote)
 - By Library (local only)
 - By Collection (local only)
- Less common (local resources)
 - Restricted search scopes – can only be searched by authorized users
 - Restricted delivery scopes – everyone can search and retrieve results, but can only be accessed by authorized users

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Front End – DEMO

Tabs

- Tabs – mechanism for displaying scopes
- Configured solely in the views wizard

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PNX – DEMO

Where to see the PNX

- Front End (add &showPnx=true to the end of the URL)
- PNX Viewer in Primo Back Office
 - After comparing source record, right click and 'View Source'/'View Frame Source' to see full code

Primo Front End > Open record in its own tab > add &showPnx=true to URL
Primo Back Office > PNX Viewer

PNX – Search Scope – DEMO

Search : Search Scope

- Indicates this record is included in this scope, and it's available to everyone for searching

Search : Restricted Search Scope

- Indicates this record is included in a restricted search scope
- Additional configuration needed in Restricted Search

Search : Scope

- Used in creating search scopes and restricted search scopes
- Section will include both search and restricted search scopes

Primo Back Office > Advanced Configuration > Full Normalization Rules Configuration
PNX Section: Search PNX Field: Search Scope

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Normalization Rules – Search Scope – DEMO

Rule group search_searchscope

Type Value

Source PNX Control/sourced ☒ Enabled

Conditions No conditions Specified

Transformations

Transformation Copy As Is Parameter

Behavior

Action ADD

Rule group search_searchscope

Type Value

Source PNX Delivery/institution ☒ Enabled

Conditions No conditions Specified

Transformations

Transformation Copy As Is Parameter

Behavior

Action ADD

```
<search>
<searchscope>TRAIN_ALMA</searchscope>
<searchscope>TRAIN_ALMA_DS</searchscope>
<scope>TRAIN_ALMA</scope>
<scope>TRAIN_ALMA_DS</scope>
</search>
```

Primo Back Office > Advanced Configuration > Full Normalization Rules Configuration
PNX Section: Search PNX Field: Search Scope

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Normalization Rules – Scope – DEMO

Type XPath

PNX search/researchscope ☒ Enabled

Transformation Parameter

Copy As Is

Type XPath

PNX search/searchscope ☒ Enabled

Transformation Parameter

Copy As Is

```
<search>
<searchscope>TRAIN_ALMA</searchscope>
<searchscope>TRAIN_ALMA_DS</searchscope>
<scope>TRAIN_ALMA</scope>
<scope>TRAIN_ALMA_DS</scope>
</search>
```

Primo Back Office > Advanced Configuration > Full Normalization Rules Configuration
PNX Section: Search PNX Fields: Scope

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Scope Values – DEMO

Show scope value configuration

Types of Search scopes

- Institution
- Library
- Collection
- Other

Restricted Scopes

- Restricted Search – can only be searched by authorized users
- Restricted Delivery – everyone can search and retrieve results, but can only be accessed by authorized users
- Additional configuration needed in the Restrictions and Delivery Configuration Wizard

Primo Back Office > Ongoing Configuration > Pipe Configuration > Scope Values Configuration

Scope Values – DEMO

Scope Values

Primo Back Office [About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Pipe Configuration Wizard](#) > [Scope Values Configuration](#)

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

Hello primoadmin

> **Scope Values List**

Owner: Use Scope for:

Scope Values List

Owner	Code	Name	Description	Type	Search	Restricted Search	Restricted Delivery	
University of Primo	ALMA_OR	Alma Course Reserve		collection	<input checked="" type="checkbox"/>			Edit Delete
University of Primo	TRAIN_ALMA	Train Alma Source Scope	Train Alma Source Scope descriptio...	instituti...	<input checked="" type="checkbox"/>			Edit Delete

Create a new scope value

Owner:

Scope Value Code: Scope Value Name: Type:

Use Scope for: ☐ Search ☐ Restricted Search ☐ Restricted Delivery [Create](#)

[Cancel & Go back](#) [Deploy](#)

To Data Sources and Pipes Wizards

Primo Back Office > Ongoing Configuration > Pipe Configuration > Scope Values Configuration

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Exercise #5

Identify the scopes used in a record

- Conduct a search in the Primo UX
- Note the citations' source in full display
- Go to PNX record
- See scope values in PNX

See handout for step-by-step instructions