

Primo August 2017 Release:  
**Birthday of Mother Teresa**

In 1979, received the Nobel Peace  
Prize *“for work undertaken in  
the struggle to overcome  
poverty and distress”*



## Auto Complete Configuration Guide



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Document released: August 2017

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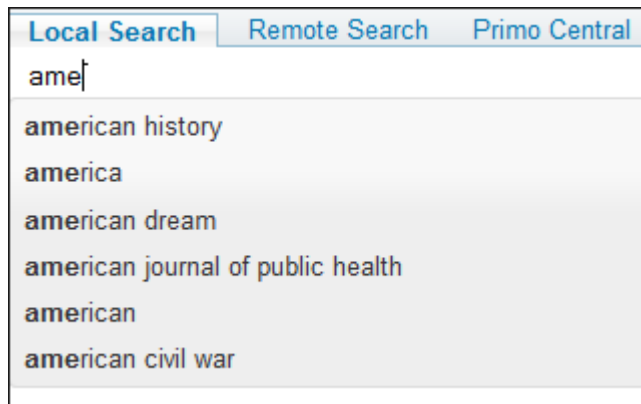
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## Introduction

The Auto Complete feature provides cloud customers with context-based suggestions that are based on top local Primo and Primo Central queries, as well as data from your local Primo institution and the Primo Central index. For more information, see [Auto Complete Indexing and Searching](#).

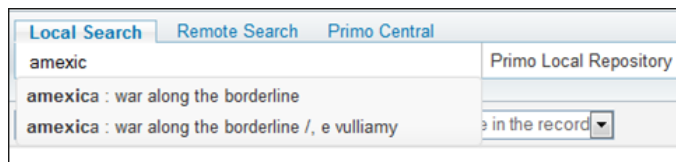
If the Auto Complete feature is enabled for a search scope, the Primo Front End requests suggestions from the Auto Complete service as users type in their queries, and then displays the suggestions under the search box. For example:



The screenshot shows a search interface with three tabs: 'Local Search' (selected), 'Remote Search', and 'Primo Central'. Below the tabs is a search input field containing the text 'ame'. A dropdown menu displays a list of suggestions: 'american history', 'america', 'american dream', 'american journal of public health', 'american', and 'american civil war'.

### Auto Complete Suggestions

The suggestions become more refined as the users enter more text. For example:



The screenshot shows the same search interface with the search input field now containing 'amexic'. The dropdown menu displays more refined suggestions: 'amexica : war along the borderline' and 'amexica : war along the borderline / , e vulliamy'. To the right of the suggestions, there is a section titled 'Primo Local Repository' with a dropdown menu labeled 'in the record'.

### Auto Complete Suggestions Refined

To configure the Auto Complete feature, see [Back Office Configuration](#).

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## Auto Complete Indexing and Searching

The data harvested from customers is stored in dedicated servers per region in the Ex Libris cloud. The data includes top queries from Primo searches (local and central). It also includes data from customers and Primo Central. The data from customers (authors, titles and subjects) is indexed per the institution – which means that all PNX records in which the search/searchscope field contains the institution code are included. The data from Primo Central (subjects and journal titles) is indexed separately.

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### Note

Auto Complete suggestions are available only to cloud customers.

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The Auto Complete index and service use standard Primo search engine technology and many features such as normalization of characters, typographical error correction, and highlighting. The service ranks suggestions using Primo's ranking algorithm. Additional boosting is provided if suggestions match top queries in Primo and Wikipedia. Primo will try to offer context-based suggestions, which means that only part of the data in the Auto Complete index is used to provide suggestions as follows:

Context-Based Suggestions

| Search Scope  | What will be searched in the Autocomplete index?                                |
|---|---|
| Primo Local scope (any scope)                       | Top queries<br>Data from the institution of the view                            |
| Primo Central                                       | Top queries<br>Data from Primo Central  |
| Primo Local + Primo Central                         | Top queries<br>Data from the institution of the view<br>Data from Primo Central |
| Remote Search (MetaLib)                             | Top queries<br>Data from Primo Central  |
| Deep-Search (such as EBSCO, WorldCat, and so forth) | Top queries<br>Data from Primo Central  |

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## Back Office Configuration

Before you can use the Auto Complete functionality, you must register your institution with the Auto Complete service. After registration, you can enable the service for all search scopes (per view) and then disable the service for specific search scopes if not needed.

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## Registering Your Institution

Registering a Primo institution with the Auto Complete service enables Primo to generate content from the local Primo index, which includes all titles, subjects, and authors from records that belong to the registered institution (based on the institution scope).

After registration, Primo automatically generates the Auto Complete content at the end of each scheduled indexing and asynchronously uploads the content to the relevant region's Auto Complete index in the Ex Libris cloud. The generation itself takes only a few minutes.

If Auto Complete is activated in the Front End before the data has been indexed, suggestions will be based on top queries and Primo Central data only. After indexing, it may take up to two days to receive suggestions that are based on local content.

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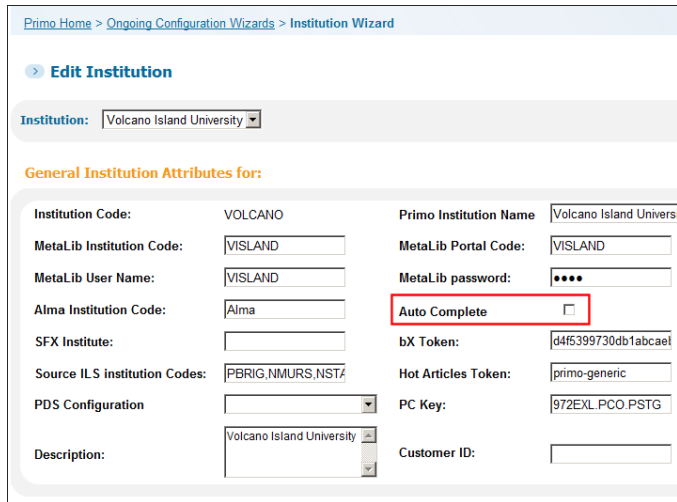
### Note

The system will re-harvest the local index whenever new/updated records cause a 10 percent change in the index. Re-indexing from scratch will also trigger a re-harvest.

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## To register an institution for the Autocomplete service:

1. On the **Primo Home > Ongoing Configuration Wizards > Institution Wizard** page, click **Edit** next to the institution that you want to register for the Auto Complete service.  
The Edit Institution page opens.



Primo Home > Ongoing Configuration Wizards > Institution Wizard

> **Edit Institution**

Institution: Volcano Island University

General Institution Attributes for:

|                               |                           |                        |                           |
|-------------------------------|---------------------------|------------------------|---------------------------|
| Institution Code:             | VOLCANO                   | Primo Institution Name | Volcano Island University |
| MetaLib Institution Code:     | VISLAND                   | MetaLib Portal Code:   | VISLAND                   |
| MetaLib User Name:            | VISLAND                   | MetaLib password:      | ****                      |
| Alma Institution Code:        | Alma                      | Auto Complete          | <input type="checkbox"/>  |
| SFX Institute:                |                           | bX Token:              | d4f5399730db1abcae1       |
| Source ILS institution Codes: | PBRIG,NMURS,NST           | Hot Articles Token:    | primo-generic             |
| PDS Configuration             |                           | PC Key:                | 972EXL_PCO_PSTG           |
| Description:                  | Volcano Island University | Customer ID:           |                           |

### Auto Complete - Edit Institution Page

2. Select the **Auto Complete** check box.
3. Save your changes to the institution.
4. Deploy your changes to the Front End.

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## Enabling the Auto Complete Service for a View

After you have registered your institution with the Auto Complete service, you must enable the service per view in the Views Wizard. This option enables the service for all search scopes. If you would like to disable the service for a specific search scope, see [Disabling Auto Complete Service for a Search Scope](#).

## To enable the Auto Complete service for a view:

1. On the **Primo Home > Ongoing Configuration Wizards > Views Wizard** page, click **Edit** next to the view for which you want to enable the Auto Complete service.  
The Edit View Attributes page opens.

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

> **Edit View Attributes**

View : Auto1

General View Attributes of Auto1 View (Volcano Island University):

|                     |  |   |
|---------------------|--|---|
| General Attributes  | View Name:*                                    | <span>Auto1</span>  |
|                     | Code :*  | <span>Auto1</span>  |
|                     | Is Template                                    | <input type="radio"/> Yes <input checked="" type="radio"/> No |
|                     | Description:                                   | <input type="text"/>  |
|                     | Enable My Library Card                         | <input checked="" type="checkbox"/>                           |
|                     | Invoke automatic search when tabs are switched | <input checked="" type="checkbox"/>                           |
|                     | Enable the "Personalize Your Results" service  | <input checked="" type="checkbox"/>                           |
|                     | Display "Personalize Your Results" pop-up page | <input checked="" type="checkbox"/>                           |
|                     | <b>Enable Auto Complete</b>                    | <input type="checkbox"/>                                      |
|                     | Default Institution                            | <span>By IP</span>  |
| Session timeout URL | <input type="text"/>                           |   |
| Appearance          | Layout Set:                                    | <span>customized layout</span>                                |

#### Auto Complete - Edit View Attributes Page

2. Select the **Enable Auto Complete** check box.
3. Save your changes to the view.
4. Deploy your changes to the Front End.

## Disabling the Auto Complete Service for a Search Scope

Once the Auto Complete service is enabled per view, it is enabled for all search scopes. In scopes with very limited data (for example, a course reserves scope), it may be necessary to deactivate the service per search scope if it is likely that suggestions will result in searches with no results.

#### To disable the Auto Complete service for a search scope:

1. On the [Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#) page, click **Edit** next to the view you want to configure.
2. Click **Save & Continue**.  
The Search Scope List page opens.
3. Click **Edit** next to the search scope for which you want to disable the Auto Complete service.  
The Edit Search Scope page opens.

Primo Home > Ongoing Configuration Wizards > Views Wizard

> Edit Search Scope

Scope: volcano Interface Language: English

General Attributes for Search Scope volcano

Scope Name : volcano Search Scope Description : Volcano Island University

General:  
Display Text: Volcano Island University Enable Auto Complete: ☒

Search Scope Values

| Type                                 | Name                           |
|--------------------------------------|--------------------------------|
| <input type="checkbox"/> Institution | Primo Institution Scope        |
| <input type="checkbox"/> library     | Volcano Campus Learning Center |

#### Auto Complete - Edit Institution Page

4. Clear the **Enable Auto Complete** check box.
5. Save your changes to the view.
6. Deploy your changes to the Front End.