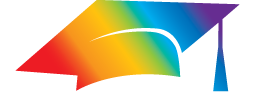
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**Primo Administration**

**Local Search Scopes**Hands-on Exercise

**Learning Objectives**

To learn how scope values and scopes are configured in Primo, and how to identify search scopes in the PNX.

By the end of this exercise, you will be able to:

* Access and view the scope values in the Scope Values Configuration
* Access and view the search/search scopes normalization rules
* Access and view the search scopes in the PNX
* Access and view scopes in the Views Wizard

**Requirements**

To complete this exercise, you will need to have a Super Admin or Admin level password to your configured Primo Sandbox Environment.

Your Primo Sandbox will need to have the following configurations for this exercise:

* Your Institution created
* Data source for your ILS created
* Normalization rule configured for your catalog data
* Pipe created and run at least once for your library catalog data
* View created for your institution
* Access to the Front End of your view and data visible

**General Instructions**

This exercise accompanies the **Primo Administration: Local Search Scopes** training session. For help with the exercise, go to the training’s launch page where you can review the presentation, download the presentation **Handout**, and find links to **Recommended Articles** in the Knowledge Center.

Please use your library’s **Primo Sandbox Environment** to complete this exercise. Note that you will not be making changes to your Sandbox Environment, only viewing default settings and configurations that have already been made.

**The Activity**

|  |  |
| --- | --- |
| **View the Scope Values** | |
| 1. **Log into your Primo Back Office** | |
| 1. **Access the scope values configuration by going to *Local Data > Data Sources*** |  |
| 1. **There will be at least one scope in this list – the institution scope. This scope contains all of the records that have been loaded into Primo for your institution. Note the values in the code and name columns.**   **If your institution has chosen to configure additional scope values, they will also appear here.** |  |
| **View the search/searchscope Normalization Rule** | |
| 1. **Go to the Normalization Rule sets by going to *Local > Normalization Sets*** |  |
| 1. ***Edit* the normalization rule for your library catalog data** |  |
| 1. **Go to the *Search* section of the PNX** |  |
| 1. **Scroll down to the search:searchscope field and click *Edit***   **This is the PNX section and field that writes the values needed to form the scope.** |  |
| **View the search/searchscope field in the PNX of a record** | |
| 1. **Open the PNX Viewer by going to *Publishing > PNX Viewer*** 2. **Type in your ILS’s data source code with an asterisk and click Go** |  |
| 1. **Click on any of the *View PNX* buttons to see the PNX for a record.** |  |
| 1. **Go to the *Search* Section** 2. **Note the values in the *search/searchscope* section.**   **One of these values should match the scope value that you just saw in the Scope Values Configuration Page.**  **The normalization rule ensures that the search scope value is written in the PNX so that Primo can identify it as being in that scope.** |  |
| **View the scope values in the Views Wizard** | |
| 1. **Open the Views List by going to *FE & Delivery > Views List*** |  |
| 1. **Click Edit to see your institutions view** |  |
| 1. ***Without making any changes*, click *Save & Continue* at the bottom of the screen** |  |
| 1. **Click on Edit to edit one of the scopes.** |  |
| 1. **Depending on how many scope values you have configured, you may have one or more Scope Values listed.**   **There should be at least one institution scope value that matches the scope value name in the Scope Values Configuration page.**  **The Views Wizard allows us to configure the scopes in the user interface search – selecting the scope value here ensures that this scope will search all of the records that contain this scope value in their PNX.** |  |
| 1. **To leave the Views Wizard without making any changes to it, click on *Primo Home* link.** |  |