Primo Scopes

Jean Cabaup | Training Consultant
Mike Pruzan | Senior Knowledge Management Specialist

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
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

Local and Remote Resources

- Primo Front End
  - Local Resources
    - Your ILS
    - Local digital repositories
  - Remote Resources
    - Primo Central
    - EBSCO, WorldCat
Local Resources

Local Data Source → Data Extracted → Data Harvested → Data Normalized Enriched → Data written to Primo Database (Persistence) → Data DEDUPed FRBRed → Index Created

Hotswap Run
DidUMean Generated

Primo Front End

Remote Resources – Primo Central

Primo Central (Remote Resources)

Primo

Primo

Primo
**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

---

**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
## 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

## Front End – DEMO

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

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

---

**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
Normalization Rules – Search Scope – DEMO

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

Normalization Rules – Scope – DEMO

Primo Back Office > Advanced Configuration > Full Normalization Rules Configuration
PNX Section: Search   PNX Fields: Scope
**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 > Ongoing Configuration > Pipe Configuration > Scope Values Configuration

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