

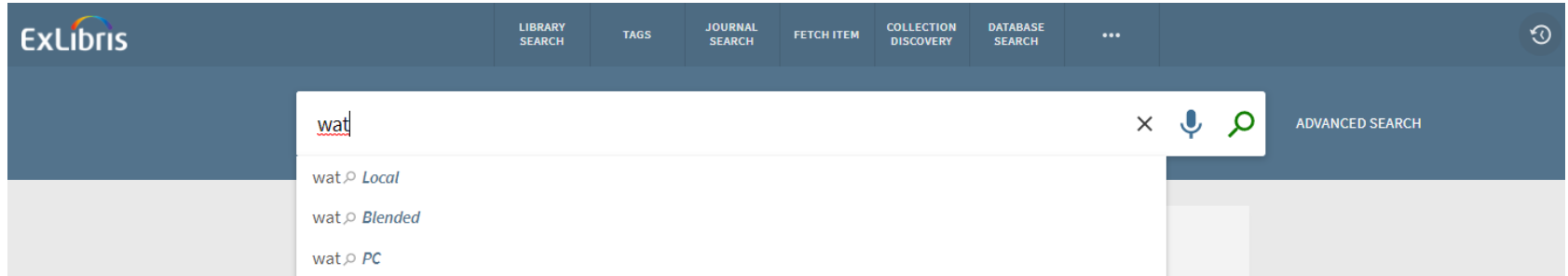
How to add a search profile for only electronic materials— Using Primo BO



Introduction

- Institutions may want to help users to easily find materials with electronic delivery as a default (whether books, journals, articles, images)
- This presentation explains how to add a default search scope for electronic materials to appear above the existing search scopes the patron has today

Here is the Primo search box now



Steps Needed

1. Define new search scope
2. Use the new search scope within the view
3. Add the search scope to the data using Normalization rules

Define new search scope

1. Create new scope value
 - a. Go to FE & Delivery > Scope Values
 - b. Create a new scope value
e.g. code: *ElectronicOnly* , name it *Electronic*
 - a. Deploy your changes

Create a new scope value

Owner: Shared by other Institutions

Scope Value Code: Scope Value Name: Type:

Use Scope for: Search Restricted Search Restricted Delivery

Use the new search scope within the view

2. Associate the new scope value within the view under dedicated search scope and tab:

- Go to FE & Delivery -> Views List
- Select your view and click on Edit
- Continue to the **Search Scope List** page
- Add new search scope in the 'Search Scope List' page

Add Search Scope

Search Scope Name:	<input type="text" value="ElectronicOnly"/>	Description	<input type="text" value="Electronic Only"/>	<input type="button" value="Add"/>
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Use the new search scope within the view

- Click edit on the new search scope and check the new search scope value (and select PC if needed)

e.g. check the new scope value named Electronic

> **Edit Search Scope**

Scope: Interface Language:

General Attributes for Search ScopeElectronicOnly

Scope Name : Search Scope Description :

Display Text:

Search Scope Values

Type	Name
<input checked="" type="checkbox"/>	other Electronic
<input type="checkbox"/>	other av_test
<input type="checkbox"/>	Institution Primo Institution Scope
<input type="checkbox"/>	other Blue Bay Digitool

- Click Save & continue

Use the new search scope within the view

- Go to Tabs configuration
- Create a new tab

Create a New Tab

Tab Code: Description:

- Add to the new Tab the new scope e.g. ElectronicOnly

Edit View Attributes
View: BC_VIEW Interface Language: English

General Attributes of ElectronicTest Tab

Tab Name:
Description:
ToolTip:
Display Find in Database:

Scopes for ElectronicTest Tab

No.	scope Name
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Add a New Scope

Scope Name:

- Click Save And Continue
- Set the order of the new tab in the Tabs List for View using the arrows
- Deploy your changes to the view

Add the search scope to the data using Normalization rules

3. Define normalization rule that sets the new scope value to online access electronic material
 - Go to Local Data > Normalization Rules
 - Select the Normalization Rules set to edit and select PNX search section
 - Edit the **search:searchscope** rule

This rule will add the new scope value you created e.g. **ElectronicOnly** as a constant to the search/searchscope under the conditions of Electronic Materials using the pre-calculated delivery/delcategory field (AlmaE ,AlmaD, online resource)

- Note: use OR among the conditions of this rule as shown in the next slide

Add the search scope to the data using Normalization rules

Rule group: search_searchscope

Type: **Constant** Value: **ElectronicOnly** Enabled

Conditions logic: **Or**

Condition 1 - Logic: True

Condition 1 - Source: Type: PNX Value: **delivery/delcategory** Success If: Match Any

Condition1 - Routines: General Parameter: Routine: Check string equals string Parameter: **Alma-E**

Condition 2 - Logic: True

Condition 2 - Source: Type: PNX Value: delivery/delcategory Success If: Match Any

Condition2 - Routines: General Parameter: Routine: Check string equals string Parameter: **Alma-D**

Condition 3 - Logic: True

Condition 3 - Source: Type: PNX Value: delivery/delcategory Success If: Match Any

Condition3 - Routines: General Parameter: Routine: Check string equals string Parameter: **Online Resource**

Transformations: Transformation: Copy As Is Parameter: Behavior: Action: **ADD**

Add the search scope to the data using Normalization rules

- Save your changes and deploy the normalization rules set
- Run update pipe to renormalize the data
- Run indexing

Refresh the Primo View

