Section 2: Search Profiles

Link to Video (10 Minutes):
http://exl-edu.com/02_Primo/Primo%20VE%20Certification/02-PRIMO-VE-DSC-Search_Profiles/

Related Documentation:

- Configuring Search Profiles for Primo VE:
  https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/010Configuring_Search_Profiles_for_Primo_VE

This video is pretty straightforward, so not much commentary is provided.

Search Profiles and Scopes

- **Search Profiles**
  - Group of records used to search
  - Used in Configure Views to display search options
  - Must contain at least one scope

- **Scopes**
  - Group of records that meets specific conditions (i.e. belong to a specific library, from a specific data source, etc.)
  - Must be included in Search Profiles to appear in UX
  - Can be used in one or more Search Profiles

Search Profiles

- The easiest way to think of this is that search profiles are the larger container that the views configuration in Primo uses to group together a variety of scopes into a single search.
- Adding a Search Profile is quite simple, especially if you already have the scopes you need set up (although I understand that this is a chicken vs. egg issue).
- To create a Search Profile, just go to Search Profile, and then add the different search scopes you’d like to use to create the search profile. The screenshot below is from the Define a Custom Search Profile screen.
You can pick whatever scopes you’d like to use for the search profile, and they can be a blend of custom scopes, scopes from your institution, and those externally managed such as the central index (your selection of resources from the Primo Central Index you’d like to search), or others.

Scopes

- Much like a lot of things in Alma/Primo, the scopes are configured to be reusable in a variety of search profiles (or just one search profile if you’re not highly customizing Alma/Primo).
- The thought is that many libraries will want to create a lot of search profiles that have blends of different scopes, so making scopes reusable within search profiles cuts down on configuration time, although it makes these concepts initially a little more confusing.
- Scopes can be those by default based on a variety of different search sources or queries, or you can create your own using “Custom Local Data Scopes” to build your own scopes.
- The custom data scopes are pretty well demonstrated in the video, and basically walk through the process of creating a scope based on metadata available in Alma.
- There are 3 different conditions by which you can create a custom scope:
  - Inventory
  - Local Fields
  - Metadata
- If you’re wondering what these different conditions are, don’t worry too much as the “Define a Custom Scope” gives you drop downs to choose from, and uses a wizard to walk you through the process.
- The screenshot below of “Define a Custom Scope” from Search Profiles Customization shows the fields you can choose from, and you can choose three conditions per scope:
And then you can also add operators (searches) within those fields for either inventory or metadata:

![Search Index and Metadata Fields](image)

- For Inventory:
  - Has Course
  - Is part of any collection
  - Is part of collection/sub-collection
  - Location
  - Physical Availability – Campus
  - Physical Availability – Library

- For Metadata:
  - Additional title
  - Alternative title
  - Creation Date
  - Creator
  - Description
  - Full Text
  - General
  - Genre

![Operator Selection](image)
If you don’t have any local fields defined, you won’t get these options when you try to create a custom local scope.

To really understand this, I would practice creating 1-2 custom local data scopes, and then add them to a search profile. If you don’t like either, just delete them.