

## Notes from the Primo VE – Become an Expert Discussion Section on “Search Configuration” February 11, 2021

### Search Configuration

RVC: Now we know what the opposite of boost is -- "deboost", in Alma-ese!

### EBSCO API

PRK: Can we talk about the problems with the Ebsco API...are libraries moving away from Ebsco content because of this issue? Could a library that's maintaining several Ebsco databases in Primo VE give me a sense of how big a deal this is, really?

TIU: Moved away from having Everything be the default search - now using "Books" for the default and directing people to go directly to EBSCO rather than using the EBSCO API search in PVE

Denise from CARLI: Some libraries don't provide the EBSCO API search at all. It's not like searching the native EBSCOhost interface. It doesn't dedupe records in Primo VE. Alma/Primo VE and EBSCO don't interact fully with one another.

JOL: Turned on EBSCO API in the everything search and it was a disaster. Found it was messing up the results from other databases that included access points to EBSCO. Plus, facets were not behaving properly. They have it on as a separate search but don't use it often and EBSCO gets indexed via other sources.

Denise: If there's a full text option from EBSCO, there should be a link to it.

JOL: Still seems to get failed article searching. Was working better in Fall than it is now; very inconsistent

Jessica from CARLI: JOL's experience including the EBSCO API in an Everything search is not unique. CARLI's documentation on the EBSCO API <https://www.carli.illinois.edu/products-services/i-share/alma/EBSCO-API> outlines Ex Libris documentation that “It is not recommended to blend third-party indexes [like the EBSCO API] with local and Primo Central searches in the library's default scope since this may impact the end users experience in the areas of facets and relevancy between the different indexes. In addition, slow responses from the external index will impact the response time for all results.”

DAC: Did user testing in summer with EBSCO API listed. Some users see that and think all the articles are there, because that is what they are used to. So they were not using the combined search (with CDI). Not sure what really to do--it's simply not a good situation.

JOL: General information about the EBSCO API: in the Alma configuration setting you have to type in each individual code for the databases and if one of those codes isn't correct or you no longer have access to one of the databases then the whole thing will fail. Need to keep that database list up-to-date - if one is wrong it will return no results.

Gail: Is there a list of database codes? Yes: [https://connect.ebsco.com/s/article/EBSCOhost-Database-Short-Names-List?language=en\\_US](https://connect.ebsco.com/s/article/EBSCOhost-Database-Short-Names-List?language=en_US)

MIL: not all EBSCO databases are compatible with the Alma EBSCO API either

## Deduping CDI Records

DPU: The Ex Libris trainer said that **CDI records could be deduped** (against other CDI records). Is that right? And if so where's the relevant configuration for that?

Jessica: Controlled by Ex Libris and not any relevant configuration that an individual library can control.

Denise: Ex Libris tries to group together useful metadata. See this documentation on Match and Merge in CDI:

[https://knowledge.exlibrisgroup.com/Primo/Content\\_Corner/Central\\_Discovery\\_Index/Documentation\\_and\\_Training/Documentation\\_and\\_Training\\_\(English\)/CDI\\_-\\_The\\_Central\\_Discovery\\_Index/060Match\\_and\\_Merge\\_in\\_CDI](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/060Match_and_Merge_in_CDI)

## Resource Recommender

DPU: We haven't gotten there yet but hoping we can implement the database/resource recommendation option that was mentioned last week (Feb. 4) so that key databases (EBSCO and otherwise) can be presented at the top of the results when people are searching specific keywords. Services can recommend resources based on tags you add in Alma. Documentation:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/120Other\\_Configurations/010Resource\\_Recommender\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/010Resource_Recommender_for_Primo_VE)

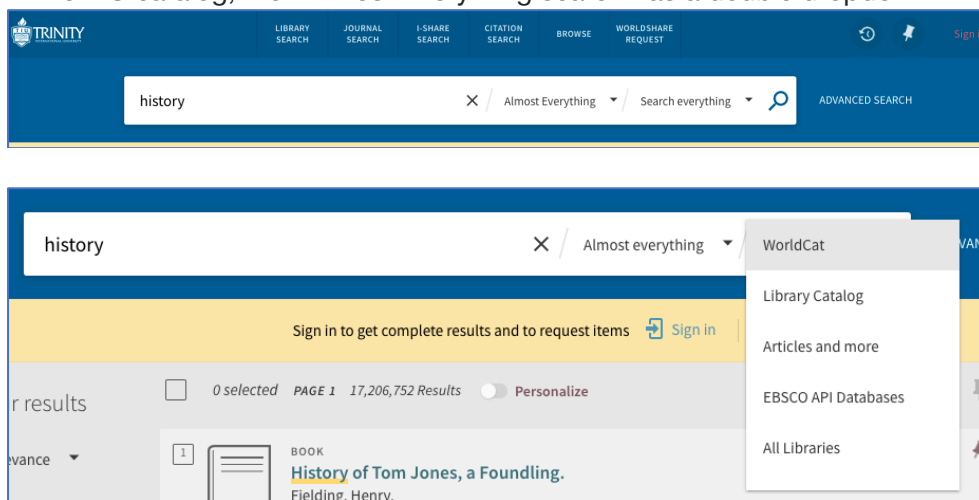
LEW used it in Summon, it was a hit or miss feature.

UIS played around with it and it looks pretty easy to configure.

## Double Dropdown in Simple Search box

TIU: I was wondering if there is a way to eliminate the double dropdown for an "everything" search. She talked about how you could list each of those items separately to get rid of the double dropdown. So I wasn't sure if that meant that an "everything" search would always have the double dropdown by necessity or if there is another fix.

In the TIU catalog, their Almost Everything search has a double dropdown:



Jessica: No, the Everything search does not always have a double dropdown, and yes, you can get rid of it. You have to have configured the Search Profile Slot to do this by assigning multiple Search Profiles.

Go to Alma Configuration > Discovery > Display Configuration > Configure Views > edit the view > Search Profile Slots tab. Any slot that has multiple search profiles assigned to it will cause the double dropdown to appear.

View Configuration Back

01CARLI\_TIU:CARLITEST >

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services

Manage Customization Package

1 - 10 of 10 + Add a Slot

Active	Code	Name	Description	Search Profiles			
<input checked="" type="checkbox"/>	Everything	TIU Books & Articles	Local data and Central Index	MyInst_and_CI,EBSCO_API			...
<input checked="" type="checkbox"/>	LibraryCatalog	TIU Books Only	Local data only	MyInstitution		▲	...
<input checked="" type="checkbox"/>	NewDiscoveryN...	I-Share	All physical/print, electronic, and digital records in this IZ; all physical/print records in the CARLI NZ; all physical/print records in any other I-Share institution's IZ whether or not records are linked to NZ	NewDiscoveryNetwork		▲	...
<input checked="" type="checkbox"/>	WORLDCAT_API	Libraries Worldwide	WorldCat API	WORLDCAT_API		▲	...
<input checked="" type="checkbox"/>	ArticleSearch	Articles	Central Index and EBSCO	CentralIndex,EBSCO_API		▲	...
<input checked="" type="checkbox"/>	CourseReserves	Course Reserves	Resources related to courses	CourseReserves		▲	...
<input checked="" type="checkbox"/>	Todos	Almost everything	WorldCat, Library Catalog, Central Index, EBSCO, IShare, Discovery Network	WORLDCAT_API,MyInstitution,CentralIndex,EB...		▲	...

As demonstrated in the Ex Libris webinar, you may want the double dropdown to appear if you wanted to have a Search Profile Slot for All Libraries and then a second dropdown for each Library, but generally speaking, most Search Profile Slots will have a single Search Profile in them.

Next, we can look at the Alma Configuration > Discovery > Search Configuration > Search Profiles definitions to see what each of the profiles is searching. You can have ONE Search Profile that searches multiple different scopes that you want to search, and then set up ONE Search Profile Slot to search that ONE Search Profile.

Search Profiles Back

Search Profiles Custom Local Data Scopes Other Indexes

+ Add a Search Profile

Code	Display Name	Search type	Description	
1 CentralIndex	Articles and more	Central Index	All records within your Central Index profile	...
2 CourseReserves	Course Reserves	Local Data	All records linked to an active course	...
3 DiscoveryNetwork	All Libraries	Local Data	All records within the Discovery Network	...
4 DN_and_CI	Search Everything	Blended	All records within the Discovery Network and your Central Index profile	...
5 EBSCO_API	EBSCO API Databases	Other Index	EBSCO API Databases	...
6 MyInst_and_CI	Search everything	Blended	Blended - All records belonging to your institution and your Central Index profile	...
7 MyInstitution	Library Catalog	Local Data	All records belonging to your institution	...
8 NewDiscoveryNetwork	All I-Share Libraries	Local Data	Scoped to search all records in this IZ; and all physical/print and electronic records in the CARLI NZ; and all physical/print records in any other I-Share institution's IZ whether or not records are linked to NZ	...
9 WORLDCAT_API	WorldCat	Other Index	WorldCat	...

For example, the out-of-the-box “MyInst\_and\_CI” Search Profile pictured above combines the local results with the CDI results at the Search Profile level, then a Search Profile Slot that uses that Search Profile will return both results.

Similarly, the “NewDiscoveryNetwork” Search Profile that Ex Libris created for I-Share libraries combines the local results with the full network results at the Search Profile level; then a Search Profile Slot for I-Share uses that Search Profile.

Reminder: As mentioned above, Ex Libris and therefore CARLI recommend against using the WorldCat API and/or EBSCO API in any blended Search Profiles or in Search Profile Slots because it “may impact the end users experience in the areas of facets and relevancy between the different indexes” and may cause slow response times.

GRN: So there is no true "Everything" search that actual searches everything?

CARLI: Not that include the WorldCat and EBSCO APIs, no, you shouldn't add those, but you can make an Everything with local results, CDI results, and I-Share results.

How to add I-Share results to the Everything search: <https://www.carli.illinois.edu/products-services/i-share/discovery-interface/searcheverything>

Jessica: When Alma/Primo VE are set up by Ex Libris, it's set up from the point of view of a single institution, so they are not thinking "consortially" when they labeled it "Everything".

Denise: Lots of places change the name of the Everything search to something more descriptive since it's not actually searching everything (Books and More, Search Starter, etc).

GRN: What have people named their "Everything" search? Or any [search profile/slot] customizations you've made.

- NLU: Everything @ NLU
- NCC: Articles, Books & More (theirs does also include I-Share results)
- JOL: "Everything" worked better for them. We tried some other variations as well during our testing where we used the word "Resource" and still ultimately came back to "Everything" as the least confusing. But that may just be our population and the terminology they understand.
- DPU: Everything at DePaul
- LEW: Kept "Everything" as the name because they were trying to create consistency between what they had in Summon and what they were moving to. They changed other labels to indicate that the results would be the same from their old catalog
- DAC: All Library Resources
- LLCC: use "Everything at LLCC" that searches my institution and the CI. We also have "LLCC Books & More" that searches my institution.

Jessica; feel free to go to everyone else's Primo VEs to see what they are calling things: <https://i-share.carli.illinois.edu/> You can't see what the slot is searching, but can at least see the names and what they are presenting to users.

Jessica: Anything different you want in these discussion sections?

General consensus: They are helpful and should continue.