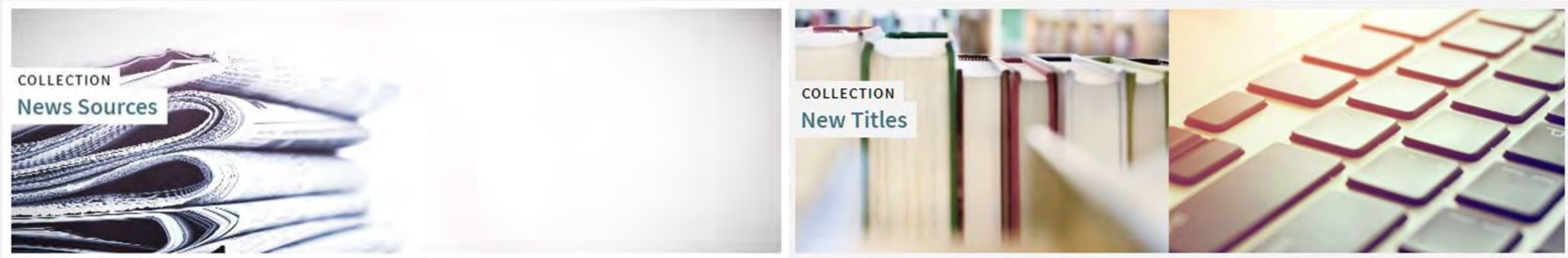


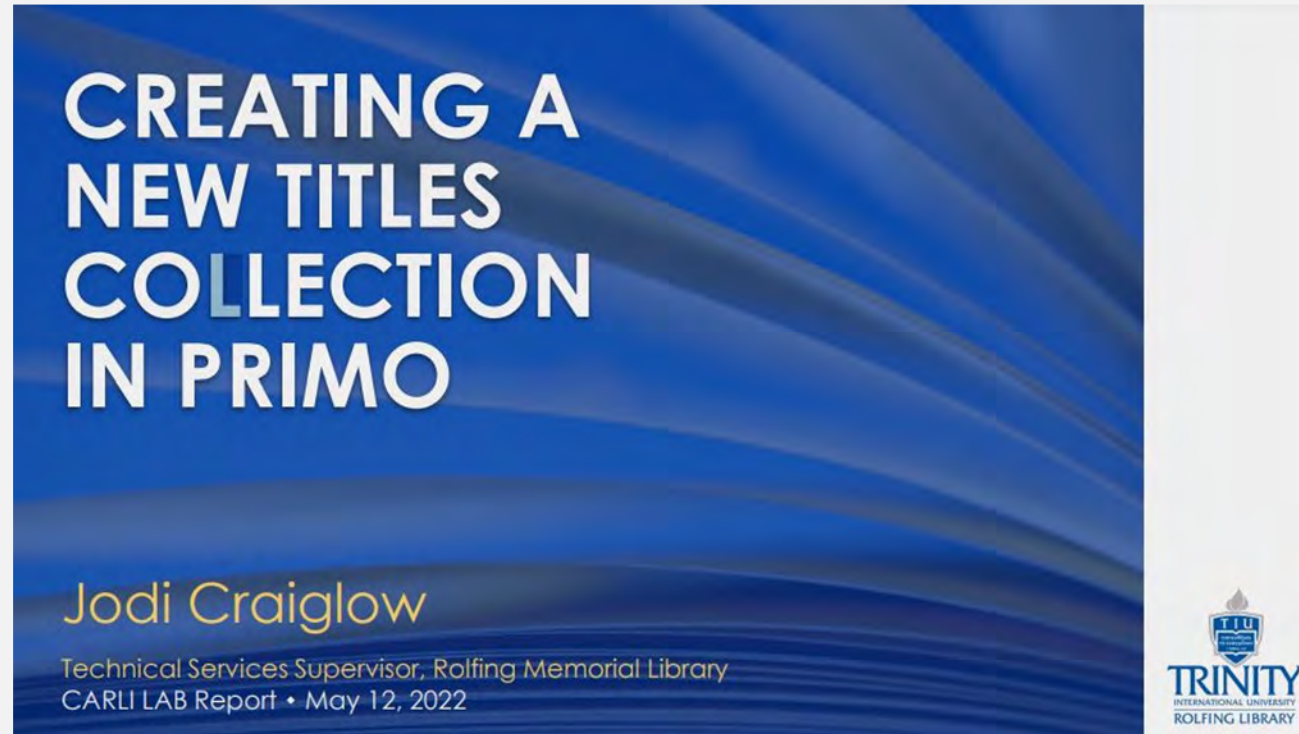
Collection Discovery



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Give credit where credit is due!

- Jodi Craiglow's CARLI Lab Report on creating a new titles collection



https://www.carli.illinois.edu/sites/files/files/20220512_Creating_New_Titles_Collection_in_Primo_Craiglow.pdf

Collection levels

- “Top-level” collections display on the main “Collection Lobby” page
 - They can contain “sub-level” collections and/or titles
-
- “Sub-level” collections display within a “top-level” collection
 - They contain titles

Activating the collections feature

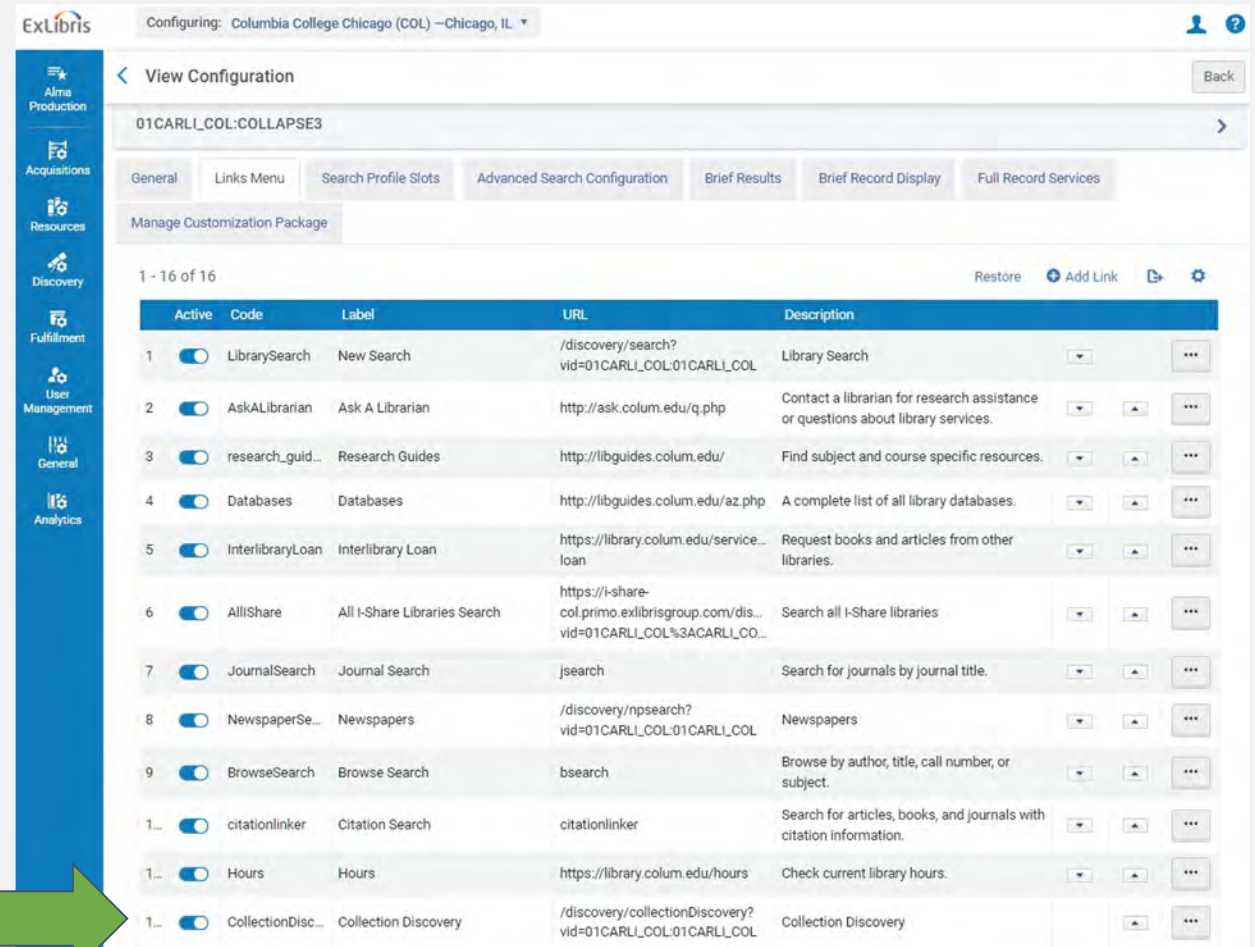
*Configuration -> Discovery -> Display Configuration -> Configure Views -> **Enable Collection Discovery Features***

The screenshot shows the ExLibris configuration interface for Columbia College Chicago (COL) in Chicago, IL. The page is titled 'View Configuration' and is for the configuration '01CARLI_COL:CARLI_COL'. The left sidebar contains navigation options: Alma Production, Acquisitions, Resources, Discovery, Fulfillment, User Management, General, and Analytics. The main content area is divided into several sections:

- Define View:** Code is '01CARLI_COL:CARLI_COL', Name is 'CARLI_COL', and Description is 'Main public view'.
- General Attributes:** This section is expanded and contains various settings:
 - Time-out URL: <https://library.colum.edu/>
 - Timeout (in minutes) for signed in users: 15
 - Side bar (Tweak my results) position: On the left
 - Select as Default View:
 - Enable Collection Discovery Features: (highlighted by a green arrow)
 - Newspapers Search Filter By Availability:
 - Related records display:
 - Enable Edit My Library Card:
 - Enable recent scopes search:
 - Display Unpaywall Links:
 - Timeout (in minutes) for guest users: 15
 - Default Language: English
 - Auto Complete Enabled:
 - Enable the 'Personalize Your Results' service:
 - Display link to Newspapers Search:
 - Highlight reference entry on top:
 - Use Voice Search:
 - Use UI supported languages:
 - Set focus on search box:
 - Enable QR On Top:
 - Display Quick Links:

Activating the collections feature

Configuration -> Discovery -> Display Configuration -> Configure Views
-> [Your default view] -> Edit -> Links Menu -> **CollectionDiscovery**



ExLibris Configuring: Columbia College Chicago (COL) — Chicago, IL

View Configuration

01CARLI_COL:COLLAPSE3

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

Manage Customization Package

1 - 16 of 16 Restore Add Link

Active	Code	Label	URL	Description		
<input checked="" type="checkbox"/>	LibrarySearch	New Search	/discovery/search?vid=01CARLI_COL:01CARLI_COL	Library Search		...
<input checked="" type="checkbox"/>	AskALibrarian	Ask A Librarian	http://ask.colum.edu/q.php	Contact a librarian for research assistance or questions about library services.		...
<input checked="" type="checkbox"/>	research_guid...	Research Guides	http://libguides.colum.edu/	Find subject and course specific resources.		...
<input checked="" type="checkbox"/>	Databases	Databases	http://libguides.colum.edu/az.php	A complete list of all library databases.		...
<input checked="" type="checkbox"/>	InterlibraryLoan	Interlibrary Loan	https://library.colum.edu/service...loan	Request books and articles from other libraries.		...
<input checked="" type="checkbox"/>	AlliShare	All I-Share Libraries Search	https://i-share-col.primo.exlibrisgroup.com/dis...vid=01CARLI_COL%3ACARLI_CO...	Search all I-Share libraries		...
<input checked="" type="checkbox"/>	JournalSearch	Journal Search	jsearch	Search for journals by journal title.		...
<input checked="" type="checkbox"/>	NewspaperSe...	Newspapers	/discovery/npsearch?vid=01CARLI_COL:01CARLI_COL	Newspapers		...
<input checked="" type="checkbox"/>	BrowseSearch	Browse Search	bsearch	Browse by author, title, call number, or subject.		...
<input checked="" type="checkbox"/>	citationlinker	Citation Search	citationlinker	Search for articles, books, and journals with citation information.		...
<input checked="" type="checkbox"/>	Hours	Hours	https://library.colum.edu/hours	Check current library hours.		...
<input checked="" type="checkbox"/>	CollectionDisc...	Collection Discovery	/discovery/collectionDiscovery?vid=01CARLI_COL:01CARLI_COL	Collection Discovery		...

Creating and managing collections

Resources -> Manage Inventory -> Manage Collections

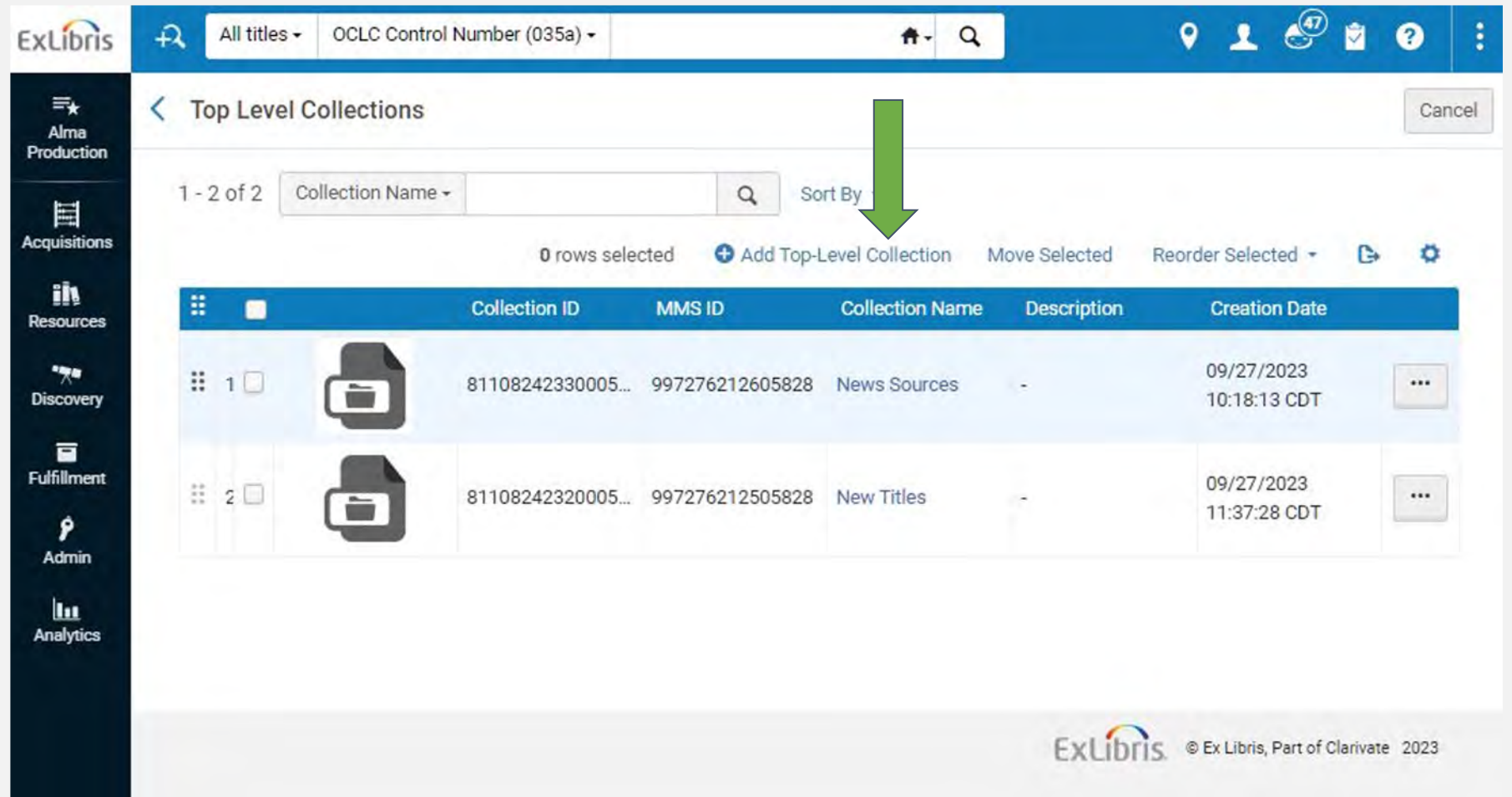
The screenshot displays the ExLibris Alma Production interface. The top navigation bar includes the ExLibris logo, a search icon, and a search field containing 'All titles' and 'OCLC Control Number (035a)'. The left sidebar contains a vertical menu with the following items: Alma Production, Acquisitions, Resources (highlighted in blue), Discovery, Fulfillment, Admin, and Analytics. The main content area lists various functions under the 'Resources' section. A green arrow points to the 'Manage Collections' option, which is located under the 'Manage Inventory' sub-section.

ExLibris + 🔍 All titles ▾ OCLC Control Number (035a) ▾

- Cataloging**
 - Open Metadata Editor
 - Search Resources
 - Browse Bibliographic Headings
 - Browse Authority Headings
 - Browse Shelf Listing
 - Authority Control Task List
 - Reminders
- Create Inventory**
 - Add Local Electronic Collection
 - Add Local Portfolio
 - Add Physical Item
 - Add Digital Representation
- Manage Inventory**
 - Manage Collections** ←
 - Community Zone Updates Task List
 - Manage Electronic Resource Activation
 - Network Harvesting Report List
 - My Electronic Resources by Provider
 - Shelf Report

Creating a new collection

“Add Top-Level Collection”



The screenshot displays the ExLibris interface for managing collections. The top navigation bar includes the ExLibris logo, search filters (All titles, OCLC Control Number (035a)), and user icons. The main content area is titled 'Top Level Collections' and features a search bar, a 'Sort By' dropdown, and a table of existing collections. A green arrow points to the '+ Add Top-Level Collection' button.

0 rows selected + Add Top-Level Collection Move Selected Reorder Selected

	Collection ID	MMS ID	Collection Name	Description	Creation Date
1	81108242330005...	997276212605828	News Sources	-	09/27/2023 10:18:13 CDT
2	81108242320005...	997276212505828	New Titles	-	09/27/2023 11:37:28 CDT

ExLibris © Ex Libris, Part of Clarivate 2023

Creating a new collection

- Required: Title, Name, Library



ExLibris

All titles - OCLC Control Number (035a)

Home Search

Alma Production

Acquisitions

Resources

Discovery

Fulfillment

Admin

Analytics

Add New Collection

Save and continue Cancel Save

Top Level Collection

Bibliographic Record Information

Record Format: MARC21 Bibliographic

Title *

Suppress from Discovery

General Information

Name *

Description

Library *

External System

External ID

Logical Collection

Thumbnail Upload

Place at/before: Bottom

Forms

Record Format: MARC21 Bibliograph

Deposit

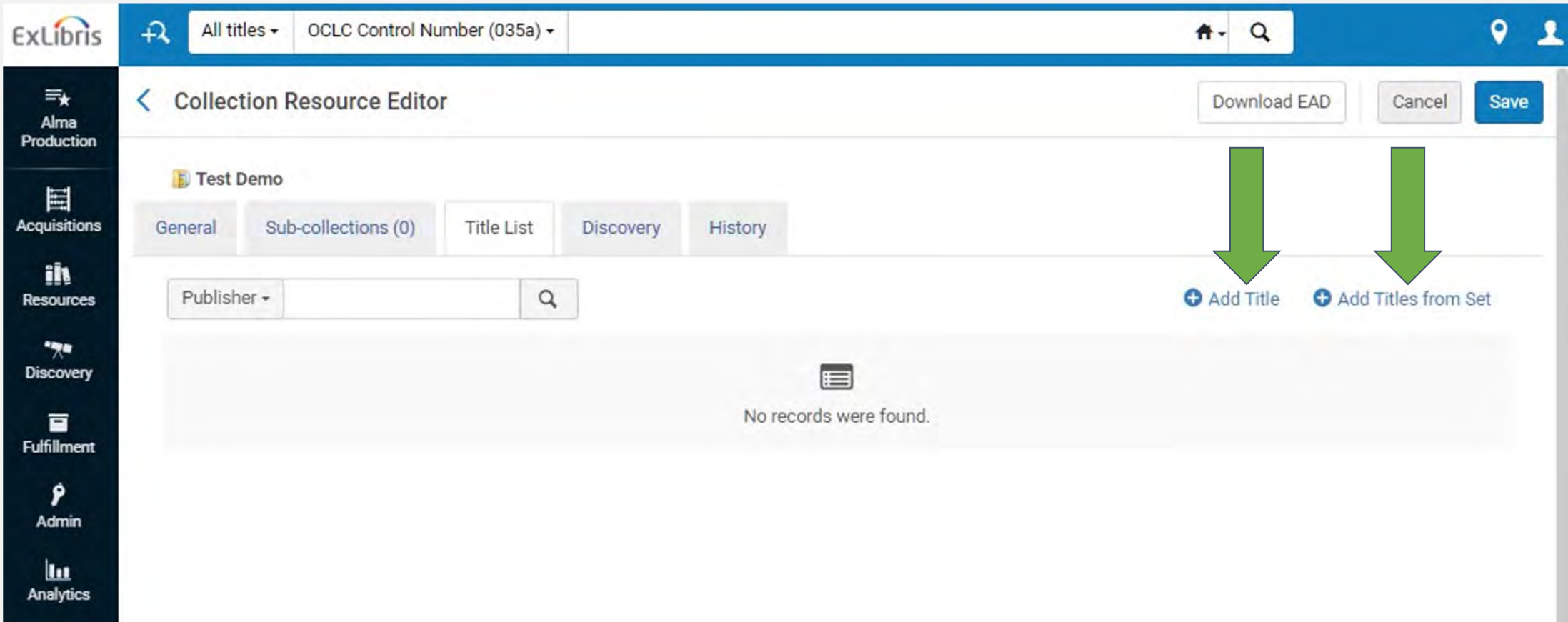
Staff-Mediated Deposit

Add Representation

ExLibris © Ex Libris, Part of Cleivate 2023

Adding titles to a collection

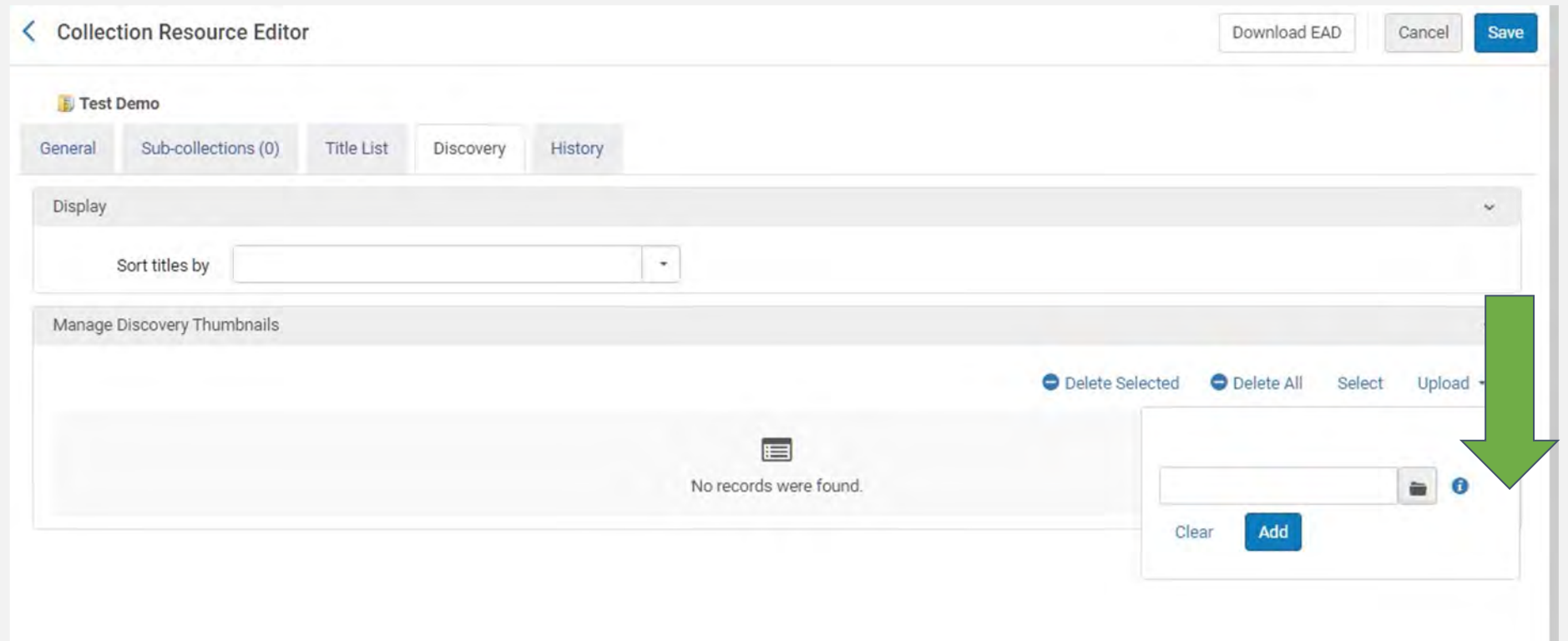
- Add individual titles or an entire set



The screenshot displays the ExLibris Collection Resource Editor interface. At the top, the ExLibris logo is on the left, and a search bar contains "All titles" and "OCLC Control Number (035a)". A navigation menu on the left lists Alma Production, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main area is titled "Collection Resource Editor" and shows a "Test Demo" collection. Below the title, there are tabs for "General", "Sub-collections (0)", "Title List", "Discovery", and "History". A search bar for "Publisher" is visible. On the right side, there are buttons for "Download EAD", "Cancel", and "Save". Two green arrows point to the "Add Title" and "Add Titles from Set" buttons, which are highlighted in blue. The main content area displays "No records were found."

Adding thumbnail images

Edit collection -> Discovery tab -> Manage Discovery Thumbnails -> Upload



(Can add up to 20 images, four will display in collection banner)

Queries to find new titles

Jodi Craiglow's:

The screenshot displays the 'New Titles MMSID List' query interface. The left-hand navigation pane shows the following structure:

- Subject Areas
 - Titles
 - Title Measures
 - Usage Measures
 - Usage Measures - Last Y
 - Title Details
 - Bibliographic Details
 - Bibliographic IDs
 - Title Creation Date
 - Title Modification Date
 - LC Classifications
 - Dewey Classifications
- Catalog
 - My Folders
 - Shared Folders

The main area shows the following configuration:

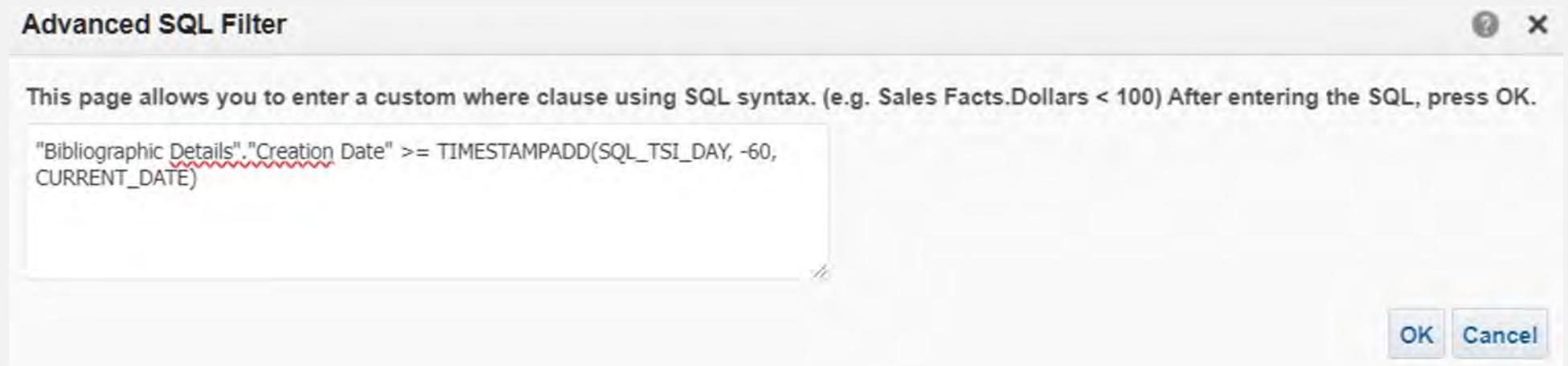
- Selected Columns:** Bibliographic Details, MMS Id
- Filters:**
 - "Bibliographic Details"."Creation Date" >= TIMESTAMPADD(SQL_TSI_DAY, -60, CURRENT_DATE)
 - AND "Bibliographic Details"."Begin Publication Date" >= "Title Creation Date"."Title Creation Year"
 - AND Material Type is equal to / is in Book
 - AND Suppressed From Discovery is equal to / is in No
 - AND "Title Measures"."Num of Physical Items (Active)"+"Title Measures"."Num of Portfolios (Active)" >= 1

*Shared Folders -> Community -> Reports -> Consortia -> CARLI -> Member Library Submissions -> **New Titles MMSID List***

Queries to find new titles

- Change query based on your institution's needs and workflow
(remember to first make a copy of the query in your own folder!)

- Adjust timeframe for new titles by changing the SQL filter of "Creation Date". Currently including the last 60 days up to the current date (-60)



Queries to find new titles

- Example query for new physical titles at Columbia:

The screenshot displays a library catalog interface titled "New Titles - Physical (Adjusted for Columbia)". The interface includes a navigation menu on the left with sections for "Subject Areas" and "Catalog". The "Subject Areas" section is expanded to show "Physical Items", which includes sub-sections like "Physical Item Details", "Holding Details", "Item Creation Date", "Item Modification Date", "Item Receiving Date", "Library Unit", "Location", "Temporary Location", "Bibliographic Details", "LC Classifications", "Dewey Classifications", "Other Classifications", "PO Line", "PO Line Approver", and "PO Line Creation Date". The "Catalog" section includes "List All" and "My Folders".

The main content area shows the query configuration:

- Selected Columns:** Bibliographic Details, MMS Id
- Filters:**
 - "Bibliographic Details"."Creation Date" >= TIMESTAMPADD(SQL_TSI_DAY, -60, CURRENT_DATE)
 - AND Suppressed From Discovery is equal to / is in No
 - AND Process Type is equal to / is in Loan; Hold Shelf; None
 - AND Barcode is not null
 - AND Permanent Call Number is not equal to / is not in Unknown

Queries to find new titles

- Example query for new electronic titles at Columbia:

The screenshot displays a library catalog interface titled "New Titles - Electronic (Adjusted for Columbia)". The interface includes a navigation bar with options like "DV", "Home", "Catalog", "Favorites", "Dashboards", "Create", and "Open". Below the navigation bar, there are tabs for "Criteria", "Results", "Prompts", and "Advanced".

The left sidebar shows a tree view of "Subject Areas" and "Catalog". Under "Subject Areas", the "E-Inventory" folder is expanded, showing various sub-folders such as "Portfolio", "Portfolio Activation Date", "Portfolio Creation Date", "Portfolio Modification Date", "Portfolio Library Unit", "Portfolio License", "Portfolio PO Line", "Portfolio PO Line Approval", "Portfolio PO Line Creation", "Portfolio URL Information", "Portfolio Details for Cons", "Electronic Collection", and "Electronic Collection".

The main content area is divided into three sections:

- Selected Columns:** Shows "Bibliographic Details" and "MMS Id".
- Filters:** Contains a complex query string: `"Bibliographic Details"."Creation Date" >= TIMESTAMPADD(SQL_TSI_DAY, -60, CURRENT_DATE)` followed by several AND conditions: `AND Suppressed From Discovery is equal to / is in No`, `AND No. of Available Portfolio is greater than or equal to 1`, `AND Portfolio Linked To CZ is equal to / is in No`, `AND Electronic Collection Public Name is not equal to / is not in Alexander Street Press; Gale Business; Insights; Gale Directory Library; Gale Literature Criticism; Gale Literature Resource Center; Gale Literature; Dictionary of Literary Biography; Gale Virtual Reference Library; Gale eBooks`, and `AND Material Type is equal to / is in Book; Music; Visual material`.

At the bottom left, there is a "List" dropdown menu set to "All" and a "My Folders" section with "My Folders" and "Shared Folders" options.

Adding new titles to a collection

1. Export analysis and use MMS to create set

Admin -> Manage Jobs and Sets -> Manage Sets -> Create Itemized Set

2. Add set to collection

Resources -> Manage Inventory -> Manage Collections -> Edit collection -> Title List -> Add Titles from Set

3. Reindex the set

Admin -> Manage Jobs and Sets -> Run a Job -> Recalculate Local Resource Types

Updating the collection

- Issue with reindexing?

1. *Resources -> Manage Inventory -> Manage Collections -> Edit collection -> Title list -> Export list*

2. *Resources -> Manage Inventory -> Manage Collections -> Edit collection -> Title list -> Remove all*

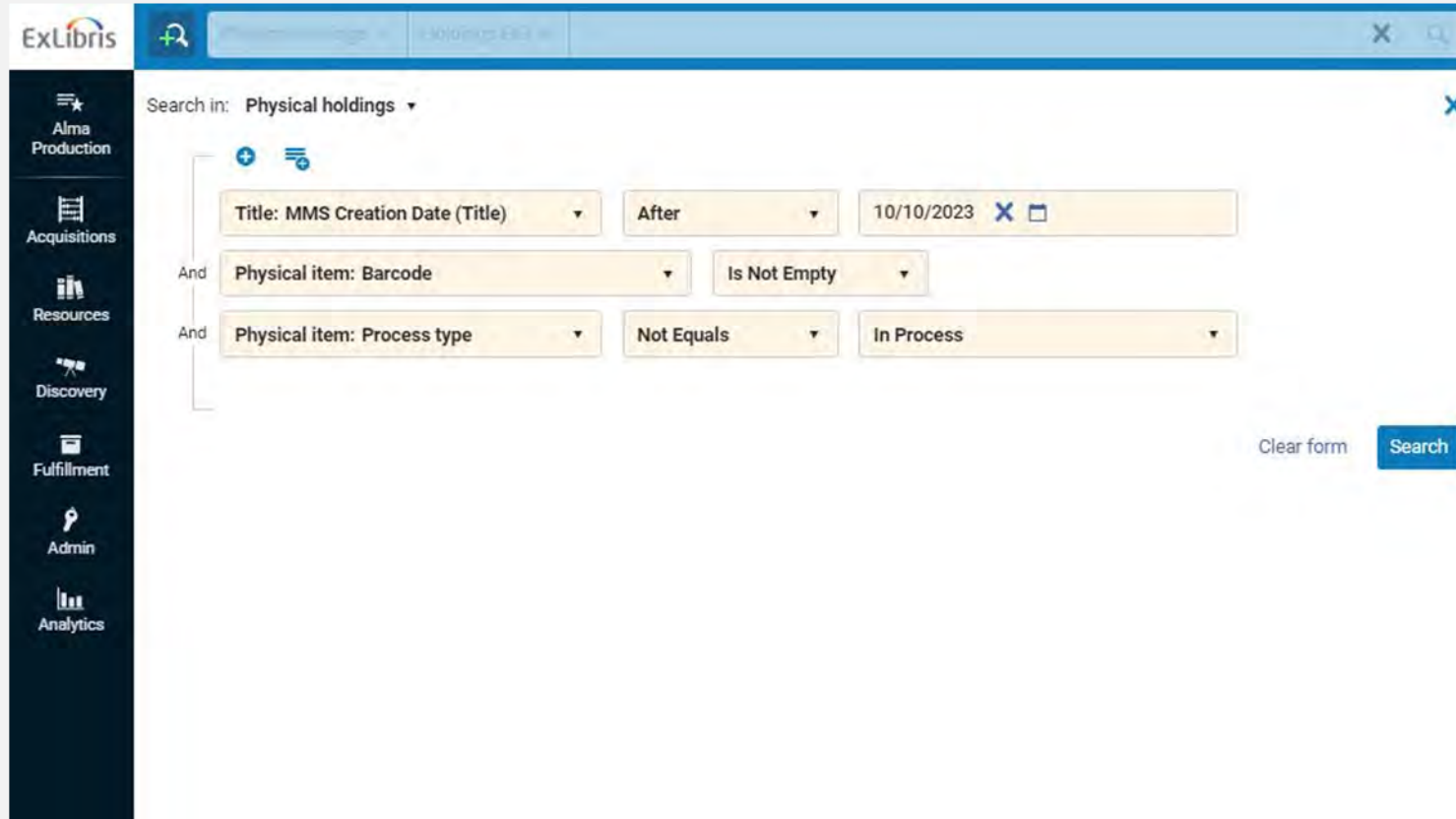
3. Run the “Recalculate Local Resource Types” job on the set of removed titles (see step 3 on prior slide)

4. Add new titles to the collection (see steps 1-2 on prior slide)

5. Run the Recalculate Local Resource Types job on the updated set

New titles with a logical collection

- Could use a logical set and logical collection:



The screenshot shows the ExLibris search interface. The search scope is set to "Physical holdings". The search criteria are defined by three conditions connected by "And" operators:

- Condition 1: Title: MMS Creation Date (Title) After 10/10/2023
- Condition 2: Physical item: Barcode Is Not Empty
- Condition 3: Physical item: Process type Not Equals In Process

The interface includes a "Clear form" button and a "Search" button.

- Would still need to manually update the “MMS Creation Date” search on a schedule

Questions?

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