

Creating New Titles Collection(s) in Alma/Primo

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Roles you need

- **Designs Analytics** (to create the analysis)
- Any Sort of **Manager/Administrator** Role (to create sets and run jobs)
- **Collection Inventory Operator** *and* **Collection Inventory Operator Extended** (to create, populate, and edit the collection)
- **Discovery Administrator** or **Discovery Operator - Limited** (to configure Primo to show Collection Discovery)

Process

1. Creating the Analysis

*I've saved a copy of this analysis in **Shared Folders > Community > Reports > Consortia > CARLI > Member Library Submissions > New Titles MMSID List**. (Make sure you do a Save As to your own institution's folder before making edits!) But if you'd like to create the report for yourself, follow the instructions below.*

- From the Alma Production Menu, go to **Analytics > Design Analytics**.
- In Analytics, choose **Create > Analysis**.
- In the Subject Area, choose **Titles**.
- **Title your analysis** something like "New Titles MMSID List" and save it in your institution's shared folder (Shared Folders > [Your Institution Name] > Reports).
- **Choose the following criteria** by dragging the name of the criterion from the Subject Areas box into the Selected Columns box:
 - Bibliographic Details > **MMS Id**
 - Bibliographic Details > **Creation Date**
 - Bibliographic Details > **Begin Publication Date**
 - Bibliographic Details > **Material Type**
 - Bibliographic Details > **Suppressed from Discovery**

- o Title Measures > **Num of Physical Actives (Active)** or Title Measures > **Num of Portfolios (Active)** (*see below for more info*)
- To **filter criteria**, click on the **gear icon** beside the name of each criterion and select Filter. To use SQL in a filter (as noted below), check the **Convert this filter to SQL** box and click OK.
- Apply the following filters to the criteria:
 - o **MMS Id:** (none)
 - o **Creation Date:** (copy and paste this SQL code) "**Bibliographic Details**".**"Creation Date" >= TIMESTAMPADD(SQL_TSI_DAY, -365, CURRENT_DATE)**
 - *This will give you titles purchased in the past year (i.e., 365 days). To make it longer or shorter, change the 365 above to the number of days you'd prefer – but make sure that it's still negative.*
 - o **Begin Publication Date:** (copy and paste this SQL code) "**Bibliographic Details**".**"Begin Publication Date" >= "Title Creation Date". "Title Creation Year"**
 - *This filter, in conjunction with the Creation Date filter, will give you only the titles that were published this year.*
 - o **Material Type:** is equal to/is in **Book**
 - *If you'd like to include other types of media in your collection, click on the magnifying glass icon beside the Value text box and select the appropriate material type(s).*
 - o **Suppressed From Discovery:** is equal to/is in **No**
 - o **Num of Physical Items (Active):** (copy and paste this SQL code) "**Title Measures**".**"Num of Physical Items (Active)"+"Title Measures". "Num of Portfolios (Active)" >= 1**
 - *If you'd like to create separate lists of print titles and electronic titles, create two analyses with all the previous filters, but use these filters instead of the one above:*
 - *IN THE PRINT TITLES ANALYSIS: Num of Physical Items (Active): is greater than or equal to 1*
 - *IN THE ELECTRONIC TITLES ANALYSIS: Num of Portfolios (Active): is greater than or equal to 1*
- **Delete all the criteria except MMS Id** from the Selected Columns box by clicking on each **gear icon** and selecting **Delete**.
 - o *The filters will remain, and this will give you a clean MMS Id list to use when you're creating your set.*
- Click on the **Results** option at the top of the screen, and it will give you a list of all the MMS Ids of new titles in your collection.
- **Export this list** to a spreadsheet by clicking the **Export icon** (second from the left, right beside the print icon) and choosing **Data > Excel**.
 - o *You have the option of creating a set based on an analysis, but at least in my experience, it takes a lot longer to load the analytics list than it does to simply upload the Excel file.*

2. Creating the Set(s)

- From the Alma Production Menu, go to **Admin > Manage Sets**.
- Click **Add Set > Itemized**.
- Type in a **set name**.
 - *I usually use something like "New Titles [Date]", but you can use whatever you want*
- Choose **Set Content Type > All Titles**.
- Choose **Private > No** if you'd like other staff at your library to see/use it; choose **Private > Yes** if you'd like to keep it to yourself.
- Leave the other options at default:
 - **Status > Active**
 - **Content Origin > Institution only**
- **Upload the spreadsheet** you just exported from Analytics and hit **Save**.
 - *If you get an **error message** at this point, you'll need to do some data scrubbing of your Excel file because Alma doesn't understand numbers stored as text. A quick hack (it takes longer to describe than to execute) to get your MMS Ids in a readable format:*
 - *Open up your spreadsheet file.*
 - *In the cell beside the first MMS Id number, type =concatenate(A2) (where A2 is the cell containing the first MMS Id number) and press **Enter**.*
 - *Press the **left arrow key** once (to get into that number square), and then hit **Ctrl+down arrow** (to get to the bottom of the list).*
 - *Press the **right arrow key** once (to get back into the second column), and then press **Shift+Ctrl+up arrow** (to highlight all the empty cells beside the filled MMS Id cells).*
 - *Press **Ctrl+d** (to fill the formula down the rest of the cells).*
 - *Press **Ctrl+c** (to copy the cells you just filled).*
 - ***Right click** on the first MMS Id number cell, and then select **Paste Values only** (to get those pesky numbers in the right format).*
 - ***Select all of Column B** (click the column header) and press the **Delete key**.*
 - ***Save** and close your file.*
- You'll get a confirmation message saying the job was started.

3. Creating a Collection

- In the Alma Production Menu, go to **Resources > Manage Collections**.
- Pick **Add Top-Level Collection**.
- Add the following information to the Collection information and hit **Save**:
 - **Record Format:** MARC21 Bibliographic
 - **Title:** a name that's discoverable/searchable in Primo
 - **Name:** what you want to call this collection
 - *I use the same Title and Name for my collections, to cut down on confusion – but use whatever naming conventions you'd like*

- o **Library:** whatever library you'd like this collection to be "housed" in
- o **Thumbnail Upload:** an image that will serve as the "cover graphic" for your collection
 - *Alma will kick you back an error message if it's not a jpg, png, or gif, or if it's over 100k in size – a word to the wise: of these three file types, jpg is the smallest*
 - *If you don't choose a graphic, Alma will use its default image (which, to be honest, isn't very visually appealing)*
- In the Collection Resource Editor, you have the option to create Sub-collections.
 - o *We've split out our list out by print titles and electronic titles, because unfortunately you can't facet a collection – but for that, you'll need separate sets for electronic and print titles.*
 - o Click the **Sub-collections** tab.
 - o Click **Add Sub-collection** and enter the same information as above (with a new sub-collection Title and Name).
- To add titles to the collection/sub-collection:
 - o Click the **Title List** tab.
 - o Click **Add Titles from Set**.
 - *You have the ability to add individual titles by clicking **Add Title**.*
 - o Choose the **Name** of the set you just created and click **Add Set Titles**.
 - o You'll get a confirmation message saying the job was started.

4. Finding the Collection in Primo

- Simply type the name of the collection in your **Primo search bar**, and you'll see it returned in the results list.
- To turn on Collection discovery in your Primo instance:
 - o In the Alma Production Menu, go to **Configuration**.
 - *Please be very, VERY careful when you're in the configuration menu. You can break your library very easily here.*
 - o Choose **Discovery > Configure Views**.
 - o Click the **action menu** beside your **Default View** and select **Edit**.
 - o Toggle the **Collection Discovery** option to **Active**.
 - o Edit the Collection Discovery description by clicking **Edit** in the **action menu**, changing the description, and clicking **Save**.
 - o Click **Back** to save your change.
- You'll now have a "Collection Discovery" option in the top Primo menu bar.

5. Changing out Titles in the Collection

- Because the New Titles MMS Id List analysis is **dynamic**, a new list will generate every day when Analytics updates.
- At an interval of your choosing, **export (and scrub) the Excel file** of MMS Ids and **create a new set** using the instructions above.

- o *Unfortunately, Alma doesn't let you update existing itemized lists using file uploads. So once you've used a New Titles set to populate your collection, feel free to delete it.*
- In the **Title List** tab of your collection, select **Remove All Titles** and you'll get a confirmation message telling you the job has started.
- Populate your fresh list by clicking **Add Titles from Set** and using the instructions above.
 - o *Since these are officially jobs, they'll take a few minutes to complete.*
 - o *Your collections will repopulate in Primo at the next refresh (again, a few minutes).*