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**

    - 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:
    - **MMS Id**: (none)
    - **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.*
    - **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.*
    - **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).*
    - **Suppressed From Discovery**: is equal to/is in **No**
    - **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**.
    - *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**.
    - *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*

    - Library: whatever library you'd like this collection to be "housed" in
    - 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.
    - *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.*
    - Click the Sub-collections tab.
    - 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:
    - Click the Title List tab.
    - Click Add Titles from Set.
        - *You have the ability to add individual titles by clicking **Add Title.***
    - Choose the Name of the set you just created and click Add Set Titles.
    - 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:
    - 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.*
    - Choose Discovery > Configure Views.
    - Click the action menu beside your Default View and select Edit.
    - Toggle the Collection Discovery option to Active.
    - Edit the Collection Discovery description by clicking Edit in the action menu, changing the description, and clicking Save.
    - 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.

    - *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.
    - *Since these are officially jobs, they'll take a few minutes to complete.*
    - *Your collections will repopulate in Primo at the next refresh (again, a few minutes).*