

# **Making Hidden Treasures Visible with Primo Discovery Collections**

Trevor Hough, Metadata & Discovery Coordinator

Ceilan Hunter-Green, Metadata & Discovery Manager



# Outline

---

- Who we are
- The basics: What is a Discovery Collection?
- Making and managing Discovery Collections
- Customising Discovery Collections



# University of Leeds

---

- In Leeds, West Yorkshire
- Established as Leeds School of Medicine in 1831 and Yorkshire College of Science in 1874 which merged in 1884. Formally established as University of Leeds in 1904
- Eleventh largest university in the UK
- Part of the Russell Group of research-intensive UK universities
- Over 39,000 students from 170 different countries and over 9,000 staff of 100 different nationalities



# University of Leeds Libraries

---

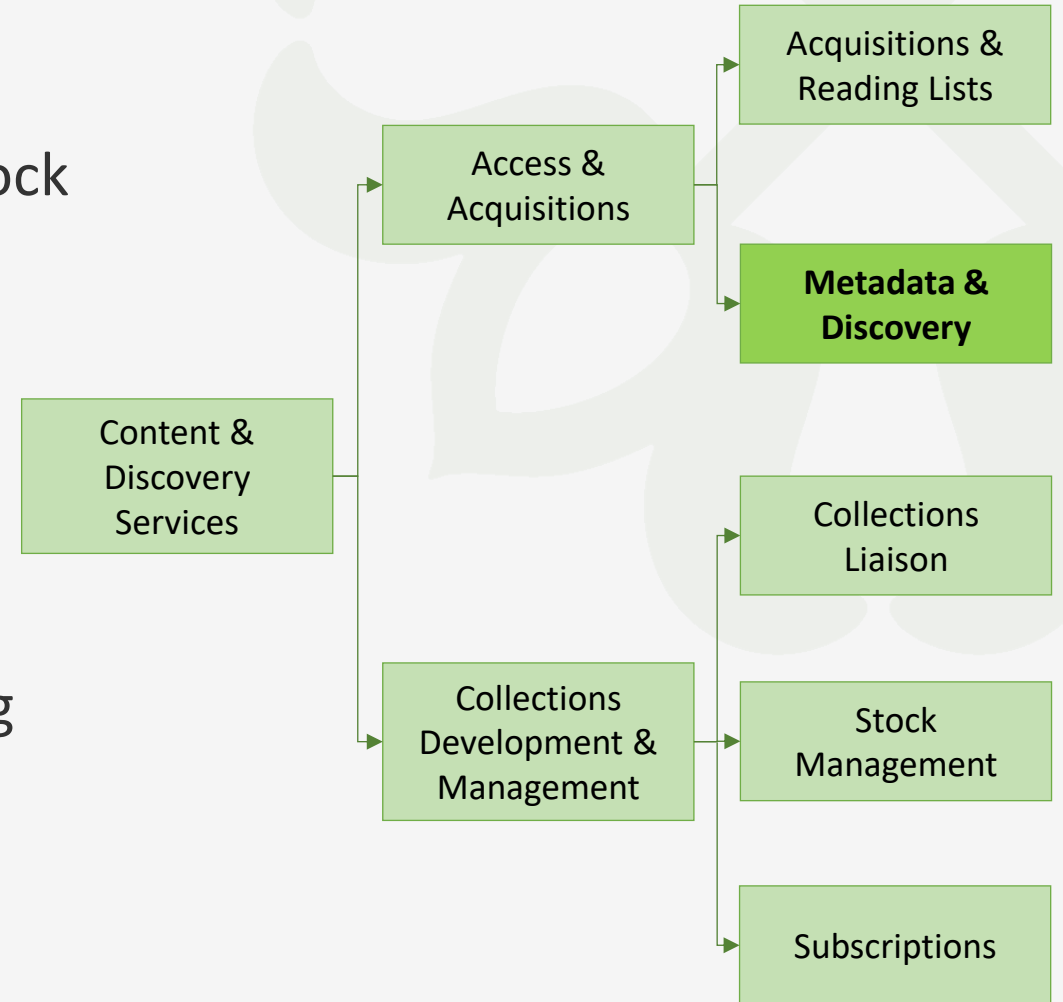
- Five libraries with 2.7 million items
- Over 2.5 million annual visits
- White Rose Research open access repositories for papers, theses and data from WR universities (Leeds, York, and Sheffield)
- Five designated collections deemed internationally important
- Migrated to Alma in 2019
- Primo VE and a Premium Sandbox



# University of Leeds Metadata & Discovery team

---

- Fourteen staff members
- Work alongside Acquisitions & Reading Lists, Stock Management, Collections Liaisons and Subscriptions teams under Content & Discovery Services banner
- Remit includes:
  - Print and e-book cataloguing
  - Special Collections monograph cataloguing
  - E-resource access, authentication and maintenance
  - Discovery experience development



# Alma permissions needed to work with Collections

---

- The following roles can work with collections:
  - **Collection Inventory Operator:** Create and edit sub-collections and move sub-collections between parent collections
  - **Collection Inventory Operator Extended** together with **Collection Inventory Operator:** Create, edit, and delete top level collections and promote a sub-collection to be a top-level collection. Create, edit, and delete sub-collection and move sub-collections between parent collections
  - **Digital Inventory Operator:** Add/remove titles to/from a collection and move a title between collections.
- To configure discovery options (Configuration Menu > Discovery) for Primo VE, you must be assigned the role **Discovery - Admin**.

# What is a Discovery Collection?

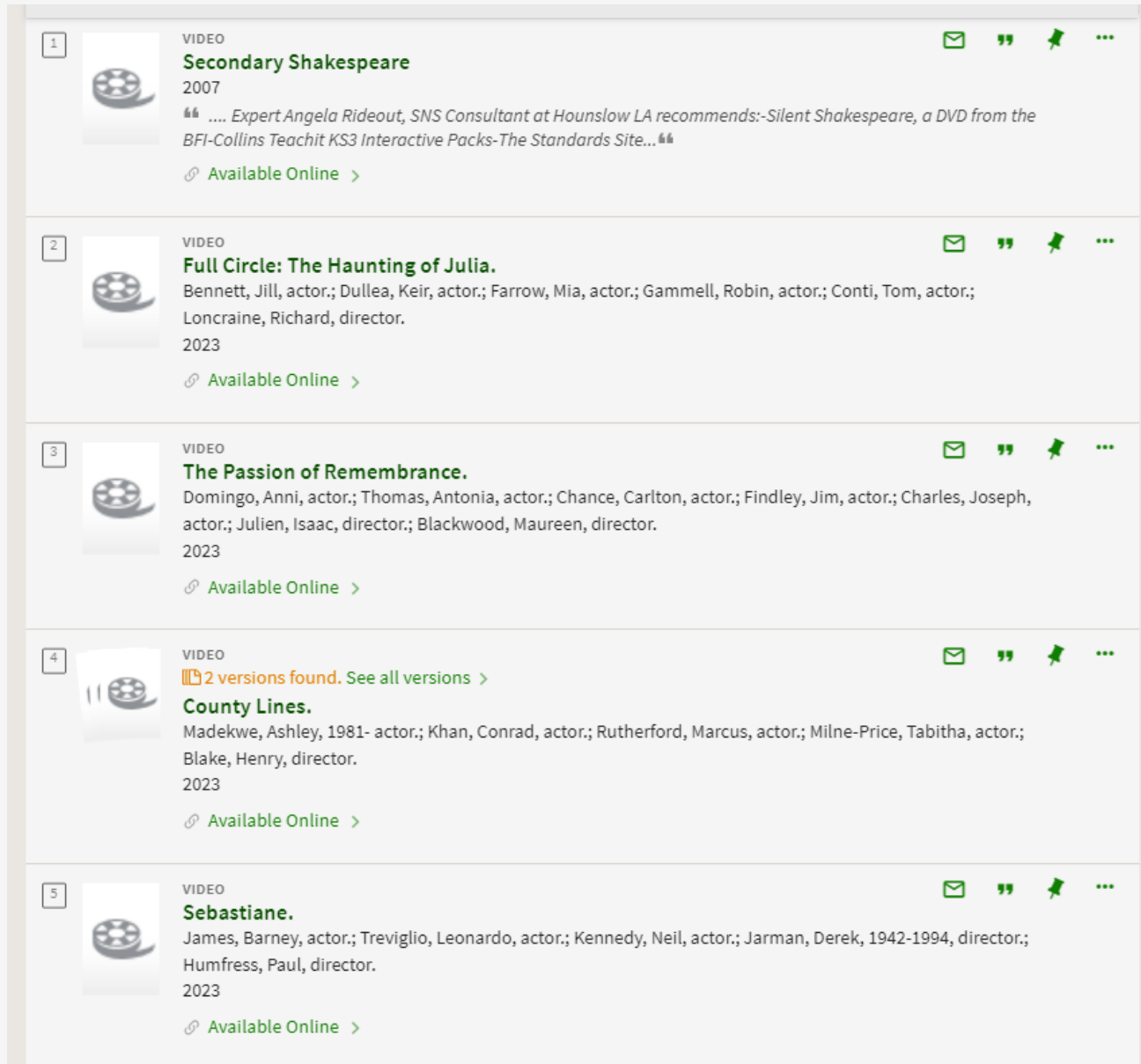
A way to group material on Primo for easier browsing, promotion of a University initiative, or to celebrate an aspect of our library collection.

The image shows a screenshot of the Primo system interface. On the left, a navigation sidebar is visible with categories: Alma, Resources, Admin, Acquisitions, Fulfillment, and Discovery. The 'Discovery' category is selected, and a sub-menu is open, listing various functions. The 'Manage Collections' option is circled in red. To the right of the sidebar, a 'View Configuration' window is open, showing a table of configuration items. The table has columns for 'Active', 'Code', and 'Label'. The row with 'CollectionDiscovery' is circled in red. Below the configuration window, there are three examples of discovery collections: 'Social Justice Jam 2024: Spaces for Change', 'Library of Things (Makerspace)', and 'British Film Institute streaming video'. Each example shows a collection title, a logo, and a list of items.

Active	Code	Label
<input type="checkbox"/>	NewSearch	New S
<input type="checkbox"/>	SearchHelp	Search
<input type="checkbox"/>	Blankill	Docum
<input checked="" type="checkbox"/>	CollectionDiscovery	Collect
<input type="checkbox"/>	ContactTheLibrary	Contact
<input type="checkbox"/>	SuggestPurchase	Suggest

- 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
- Manage Inventory
  - ★ Manage Collections**
  - Community Zone Updates Task List
  - ★ Manage Electronic Resource Activation
  - My Electronic Resources by Provider
  - Shelf Report
- Import
  - ★ Import
  - Upload Single Record From File
  - ★ Monitor and View Imports
  - Resolve Import Issues
  - Manage Import Profiles
- Advanced Tools
  - Overlap and Collection Analysis
  - Duplicate Title Analysis
  - Merge Records and Combine Inventory
  - Manage Deleted Repository
  - Restore Jobs
- Publishing
  - Publishing Profiles
  - Publishing Information

# Why do we need Discovery Collections?



The screenshot displays a list of five video search results in a library catalog. Each result includes a numbered box, a video icon, the title, cast and crew information, the year, and an 'Available Online' link. The results are:

- 1** VIDEO **Secondary Shakespeare**  
2007  
“ ... Expert Angela Rideout, SNS Consultant at Hounslow LA recommends:-Silent Shakespeare, a DVD from the BFI-Collins Teachit KS3 Interactive Packs-The Standards Site...”  
[Available Online >](#)
- 2** VIDEO **Full Circle: The Haunting of Julia.**  
Bennett, Jill, actor.; Dullea, Keir, actor.; Farrow, Mia, actor.; Gammell, Robin, actor.; Conti, Tom, actor.; Loncraine, Richard, director.  
2023  
[Available Online >](#)
- 3** VIDEO **The Passion of Remembrance.**  
Domingo, Anni, actor.; Thomas, Antonia, actor.; Chance, Carlton, actor.; Findley, Jim, actor.; Charles, Joseph, actor.; Julien, Isaac, director.; Blackwood, Maureen, director.  
2023  
[Available Online >](#)
- 4** VIDEO **County Lines.**  
[2 versions found. See all versions >](#)  
Madekwe, Ashley, 1981- actor.; Khan, Conrad, actor.; Rutherford, Marcus, actor.; Milne-Price, Tabitha, actor.; Blake, Henry, director.  
2023  
[Available Online >](#)
- 5** VIDEO **Sebastiane.**  
James, Barney, actor.; Treviglio, Leonardo, actor.; Kennedy, Neil, actor.; Jarman, Derek, 1942-1994, director.; Humfress, Paul, director.  
2023  
[Available Online >](#)

Performing a catalogue search for materials can give you very unrelated results...

...and even when you use advanced search, results are not always very browsable!



# Why do we need Discovery Collections?

DISCOVERY COLLECTIONS /

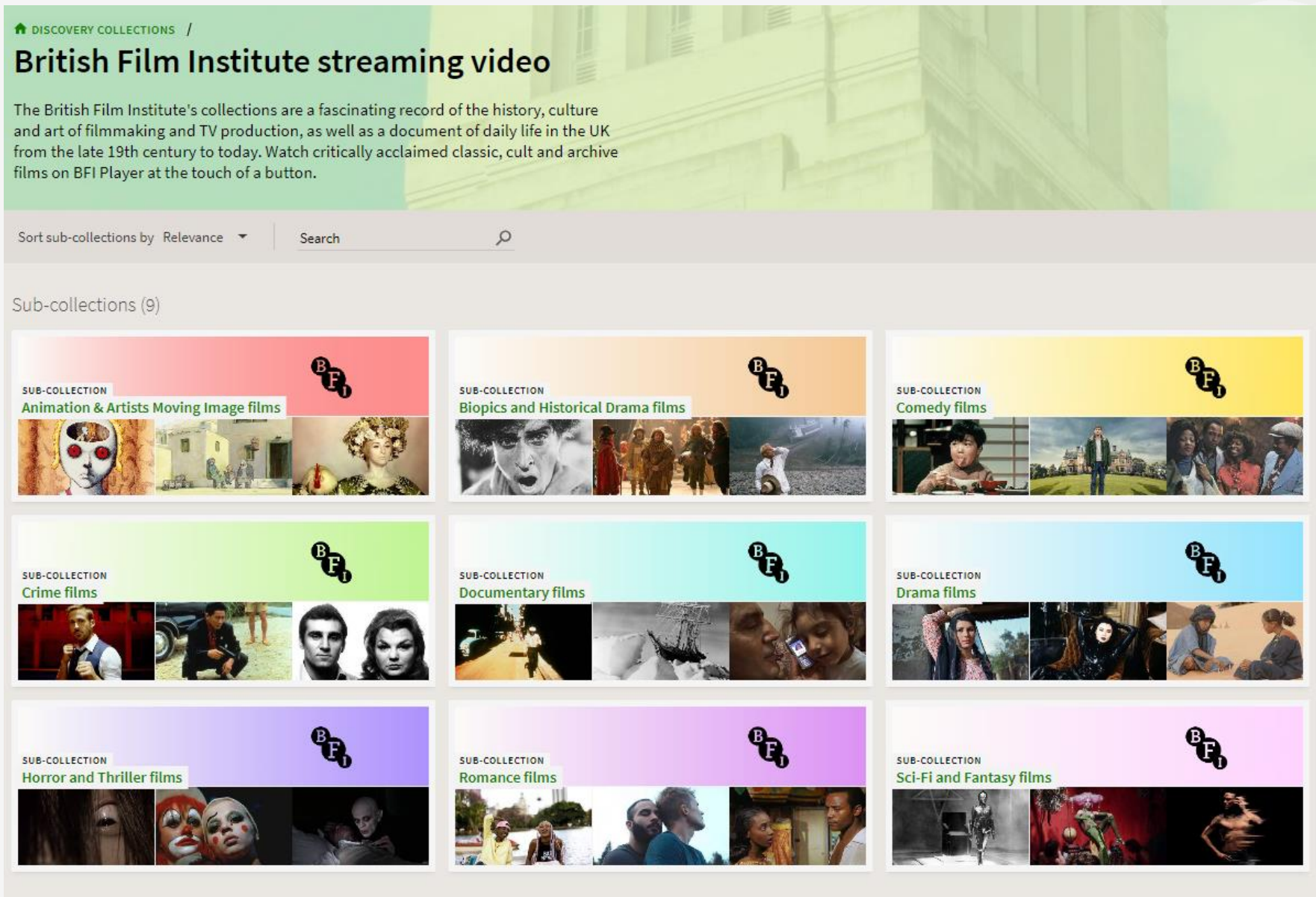
## British Film Institute streaming video

The British Film Institute's collections are a fascinating record of the history, culture and art of filmmaking and TV production, as well as a document of daily life in the UK from the late 19th century to today. Watch critically acclaimed classic, cult and archive films on BFI Player at the touch of a button.

Sort sub-collections by Relevance ▾ Search 🔍

Sub-collections (9)

- Animation & Artists Moving Image films**
- Biopics and Historical Drama films**
- Comedy films**
- Crime films**
- Documentary films**
- Drama films**
- Horror and Thriller films**
- Romance films**
- Sci-Fi and Fantasy films**



Using Discovery Collections, the catalogue materials are much easier to collect and sort in ways that are more intuitive for users.

Collections (12)

COLLECTION  
Open Access resources



OPEN ACCESS

COLLECTION  
African Books Collective



George Ngwone  
*Are you two sisters?*  
THE FOREST: An African Traditional Definition  
Ekekwonkwa

COLLECTION  
Open Educational Resources Textbooks




OSU  
Social science research: Principles, methods, and practices  
Research  
A manual  
Essentials of Linguistics  
Second Edition  
Catherine Anderson  
Bronwyn Rafter  
David Soren  
Julianne Zane

COLLECTION  
Finding research from underrepresented voices



LILACS  
BLACK WOMEN RASCALS  
AfricArXiv

COLLECTION  
Decolonisation reading list



EVOLUTION  
Racism, Whiteness and Remaking the Academy  
Decolonizing Methodologies: Research and Indigenous Peoples  
Linda Tuhiwai Smith  
DE-COLONISING UNIVERSITY

COLLECTION  
Wellbeing Collection



David Veale & Paul Williams  
Manage Your Mood  
How to use Behavioural Activation techniques to manage depression  
WELL-BEAN Cafe  
MindWell

COLLECTION  
Social Justice Jam 2024: Spaces for Change



UNIVERSITEIT VAN PRETORIA  
UNIVERSITY OF PRETORIA  
YUNIBESITHI YA PRETORIA  
UNIVERSITY OF LEEDS

COLLECTION  
Peepal Tree Press



Peepal Tree Press

COLLECTION  
Library of Things (Makerspace)



Library of Things (Makerspace)

COLLECTION  
British Film Institute streaming video



British Film Institute streaming video

COLLECTION  
Magazines from Overdrive



Better Homes & Gardens  
VOGUE  
Popular Woodworking

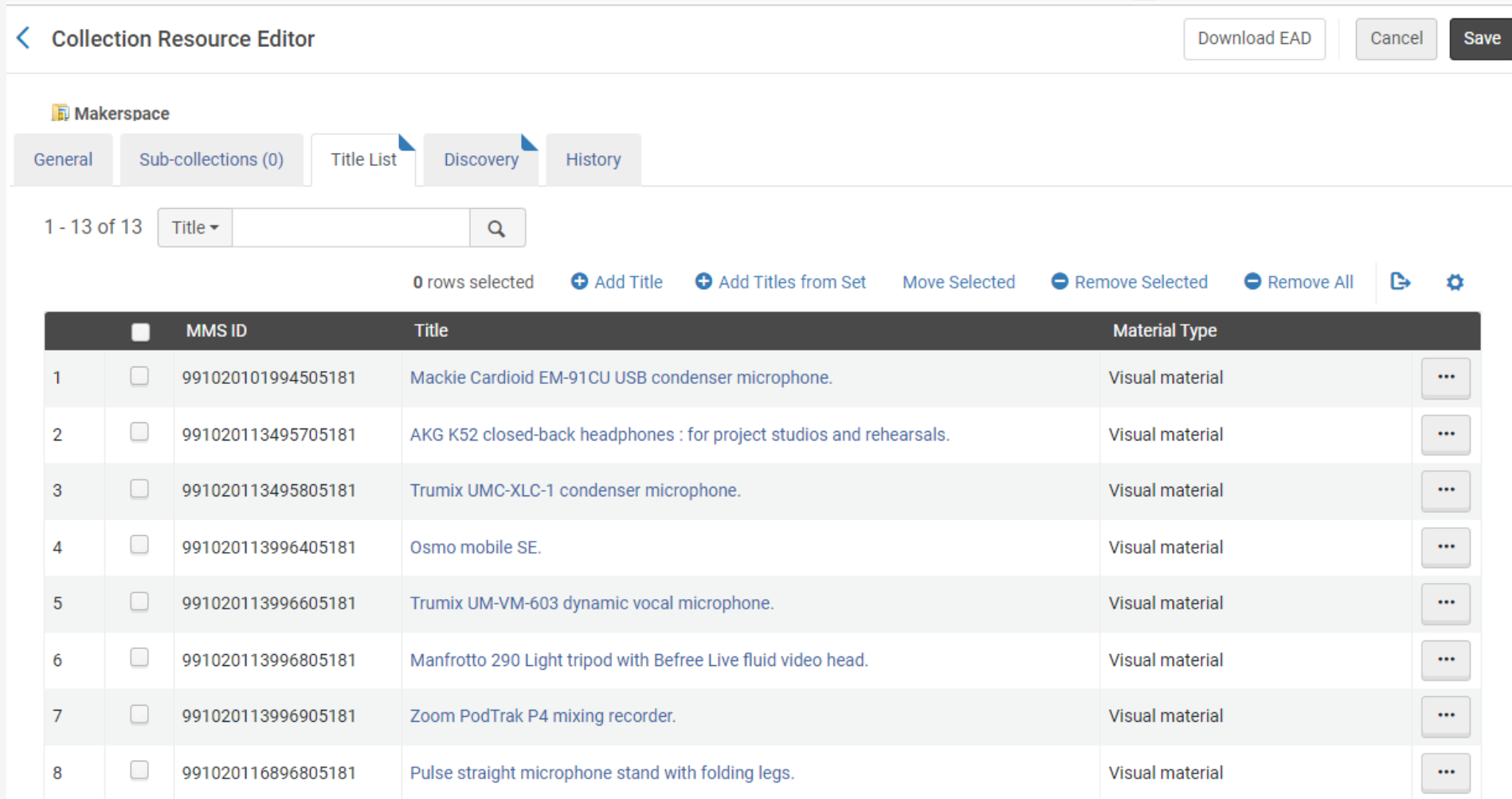
COLLECTION  
Audiobooks from OverDrive



CHIMAMANDA NGOZI ADICHIE  
WE SHOULD ALL BE FEMINISTS  
Pride & Prejudice  
DAILY ROONEY  
BEAUTIFUL WORLD, WHERE ARE YOU

# How to make a Discovery Collection

## 1. Itemised sets: Create a set and add or remove items manually



The screenshot shows the 'Collection Resource Editor' interface for a 'Makerspace' collection. The interface includes a navigation bar with tabs for 'General', 'Sub-collections (0)', 'Title List', 'Discovery', and 'History'. The 'Discovery' tab is active. Below the tabs, there is a search bar with '1 - 13 of 13' items and a search icon. The main area displays a table of items with columns for 'MMS ID', 'Title', and 'Material Type'. The table contains 8 rows of items, all with 'Visual material' as the material type. Each row has a checkbox for selection and a three-dot menu icon for actions.

	<input type="checkbox"/>	MMS ID	Title	Material Type	
1	<input type="checkbox"/>	991020101994505181	Mackie Cardioid EM-91CU USB condenser microphone.	Visual material	...
2	<input type="checkbox"/>	991020113495705181	AKG K52 closed-back headphones : for project studios and rehearsals.	Visual material	...
3	<input type="checkbox"/>	991020113495805181	Trumix UMC-XLC-1 condenser microphone.	Visual material	...
4	<input type="checkbox"/>	991020113996405181	Osmo mobile SE.	Visual material	...
5	<input type="checkbox"/>	991020113996605181	Trumix UM-VM-603 dynamic vocal microphone.	Visual material	...
6	<input type="checkbox"/>	991020113996805181	Manfrotto 290 Light tripod with Befree Live fluid video head.	Visual material	...
7	<input type="checkbox"/>	991020113996905181	Zoom PodTrak P4 mixing recorder.	Visual material	...
8	<input type="checkbox"/>	991020116896805181	Pulse straight microphone stand with folding legs.	Visual material	...

# How to make a Discovery Collection

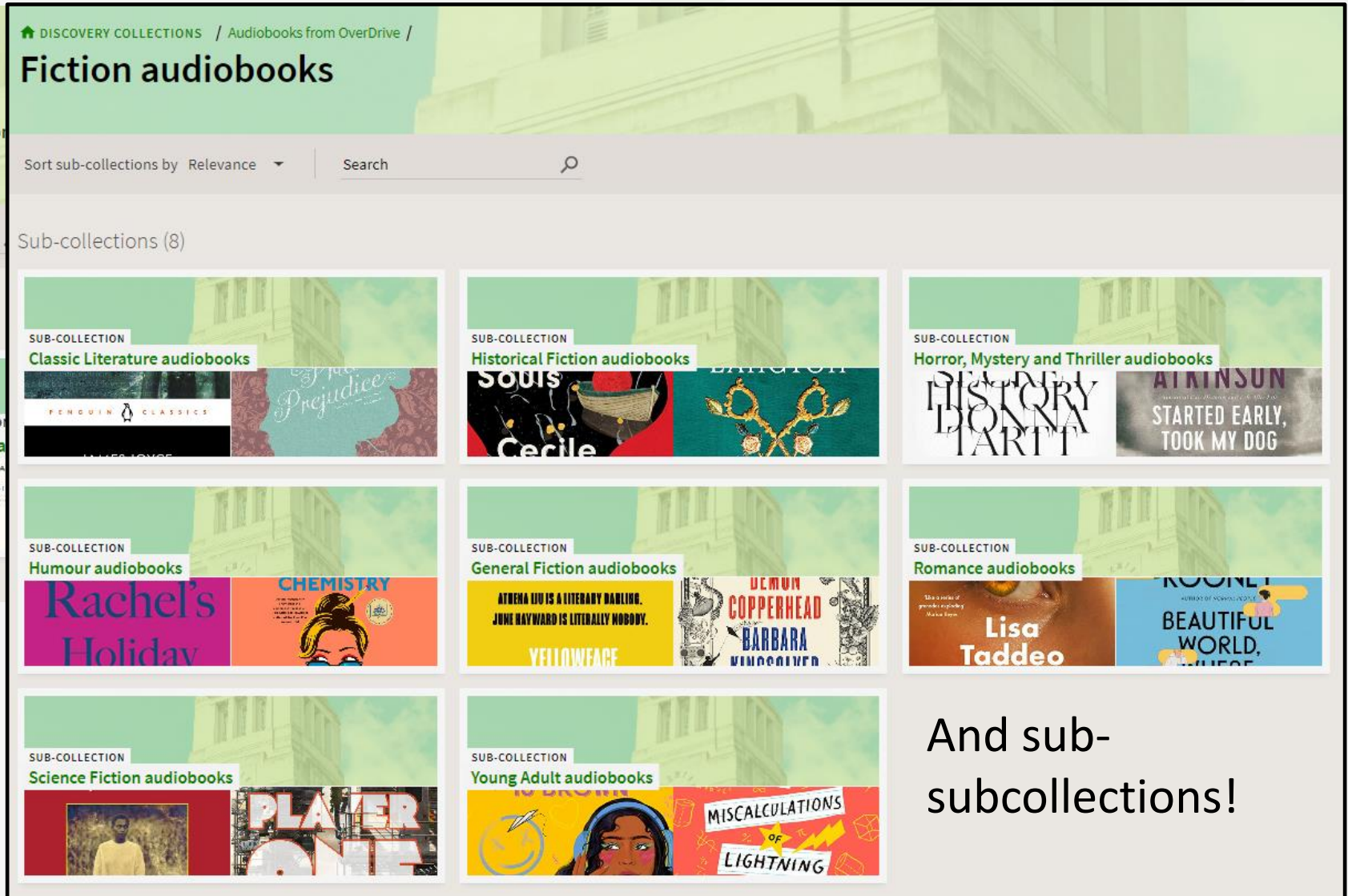
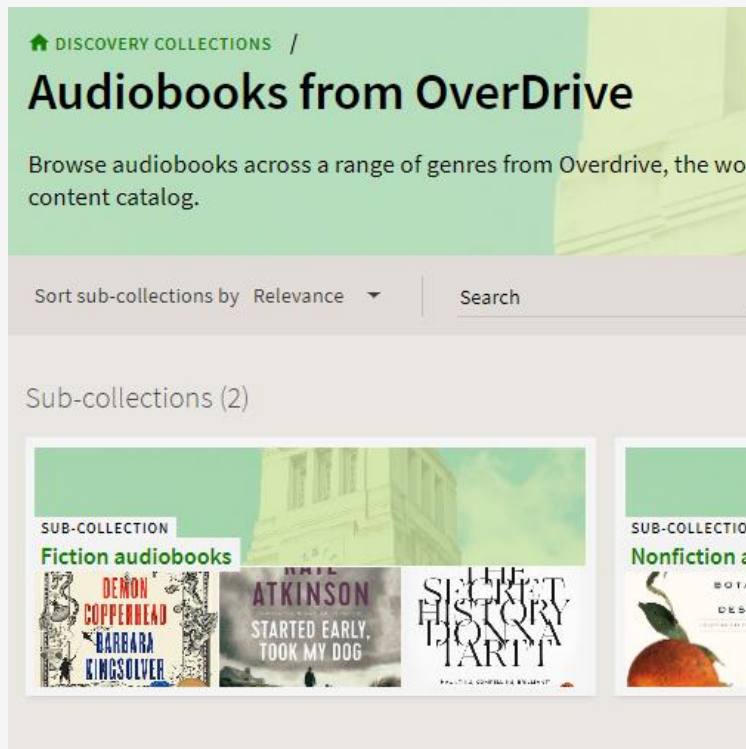
---

2. Logical sets: Create a set around a query and the collection will be updated automatically with items that fit that criteria

**Set Name: MET - CHG - BFI discovery collection - Documentary**

**Set Type: Logical where (Electronic Collection Name contains keywords "BFI" AND Subjects contains keywords "Documentary") OR (Electronic Collection Name contains keywords "BFI" AND Subjects contains keywords "Non-fiction") OR (Electronic Collection Name contains keywords "BFI" AND Subjects contains keywords "Travelogue") OR (Electronic Collection Name contains keywords "BFI" AND Subjects contains keywords "Performance") OR (Electronic Collection Name contains keywords "BFI" AND Subjects contains keywords "Narrative music video")**

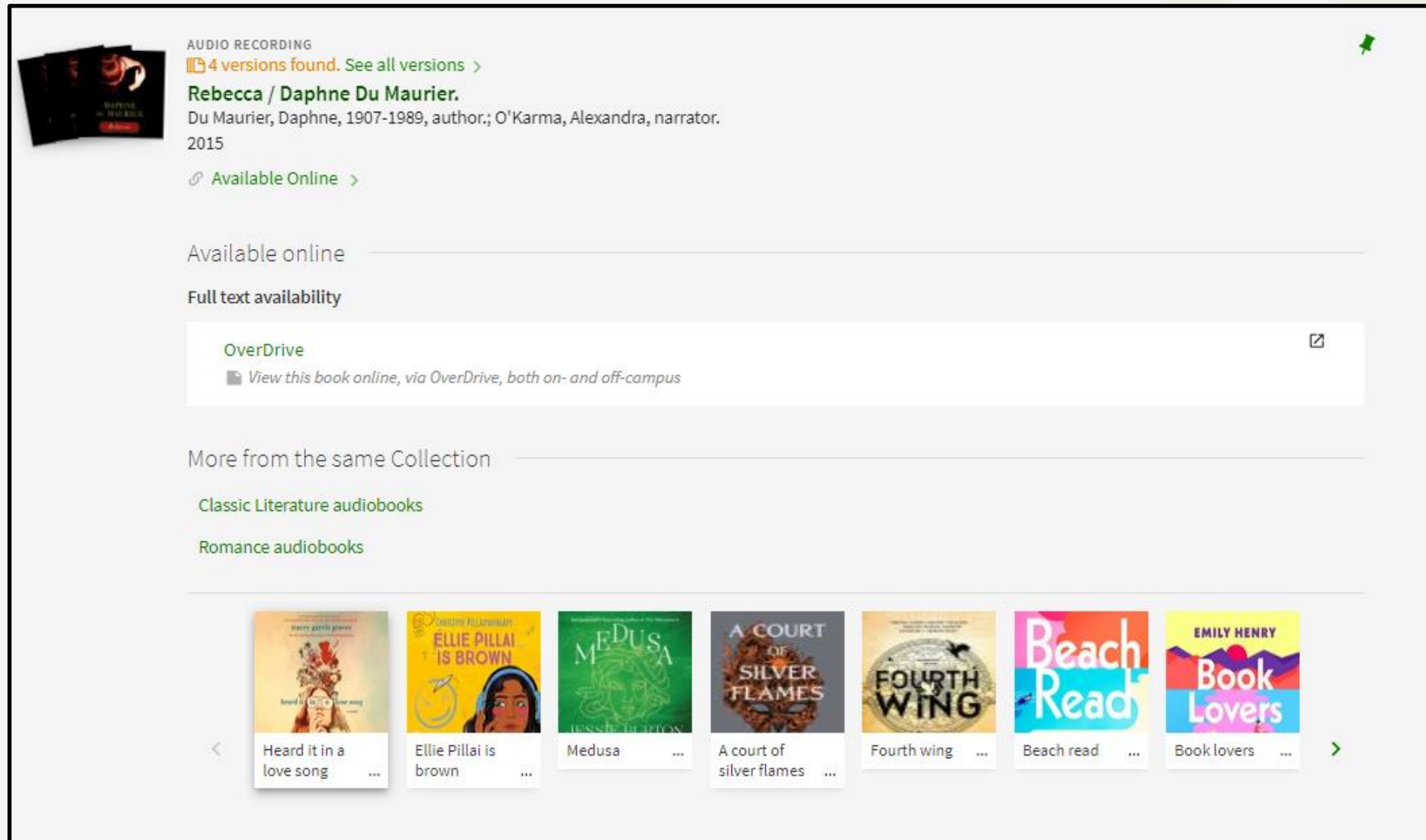
# Collections and sub-collections




As well as putting items into collections, you can organise them further by using sub-collections

And sub-subcollections!

# Collections to items and back again




**AUDIO RECORDING**  **4 versions found.** [See all versions >](#)


**Rebecca / Daphne Du Maurier.**  
Du Maurier, Daphne, 1907-1989, author.; O'Karma, Alexandra, narrator.  
2015

[Available Online >](#)

Available online \_\_\_\_\_

Full text availability

**OverDrive** 



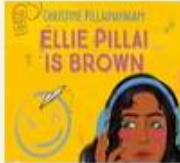






 *View this book online, via OverDrive, both on- and off-campus*

More from the same Collection \_\_\_\_\_

[Classic Literature audiobooks](#)

[Romance audiobooks](#)

---

# Collection management

## Directing search traffic using Resource Recommenders

The screenshot shows the Primo search interface. At the top, there is a search bar with the text 'research'. Below the search bar is a navigation menu with options: All, Books, Articles, Journals, Images, Scores, Video/Film, and More. The main content area is divided into two sections: 'SUGGESTED DATABASE' and 'DISCOVERY COLLECTION'. The 'SUGGESTED DATABASE' section features 'Dimensions' with a link 'Go to Dimensions' and a description: 'Access the world's largest linked research database, covering publications, grants, patents, clinical trials, datasets, policy documents or technical reports. Please register for an account with your Leeds email address.' The 'DISCOVERY COLLECTION' section features 'Finding research from underrepresented voices' with a link 'Go to Research from Underrepresented Voices Discovery Collection' and a description: 'Databases that collect research outputs from the Global South.' Below these sections, there is a search results summary: '0 selected PAGE 1 1-10 of 13,997,096 Results' and a 'Save this search' button. A search result is displayed for a 'BOOK CHAPTER' titled 'Research' by Birdi, B. (orcid:0000-0002-0002-7989); Willett, P.; Bowman, J., dated 2017-01-24, with a link 'Available Online'.

The screenshot shows the Primo administration menu. The menu is organized into several sections: 'Alma' (Search Configuration, Search Profiles, Ranking Configuration), 'Resources' (Display Configuration, Configure Views, Manage display and local fields, Manage Tags, Labels), 'Admin' (Loading External Data Sources, Discovery Import Profiles), 'Acquisitions' (Publishing, Publishing Profiles), 'Fulfillment' (Other), 'Discovery' (Resource Recommender Configuration, Central Index and proxy set-up, Discovery Showcase Allowed Domains), and 'Analytics'. The 'Resource Recommender Configuration' option is circled in red.

The screenshot shows a configuration row for a collection. It includes a grid icon, the number '7.', a toggle switch, the text 'CUSTOM2', the collection name 'Discovery Collection', and a description 'This type can be customized to fit a local resource type.' A red box highlights the entire row.

# Customising the display of a collection

**LGBT+ Pride Month**

General | **Sub-collections (2)** | Title List | Discovery | History





Properties

Name: **LGBT+ Pride Month**

Description: **LGBT+ Pride Month is a celebration of lesbian, gay, bisexual and trans people, which began after the Stonewall riots, a series of gay liberation protests in 1969. The Library has compiled this collection of material that celebrates and explores LGBT+ history in the UK. Please send any suggestions to [metadatamailbox@leeds.ac.uk](mailto:metadatamailbox@leeds.ac.uk).**

Library \* **Brotherton Library** External System External ID

Logical Collection  Thumbnail Upload  Change to default thumbnail

1	<input type="checkbox"/>	
2	<input type="checkbox"/>	
3	<input type="checkbox"/>	
4	<input type="checkbox"/>	



One background image (banner)

Up to three icons



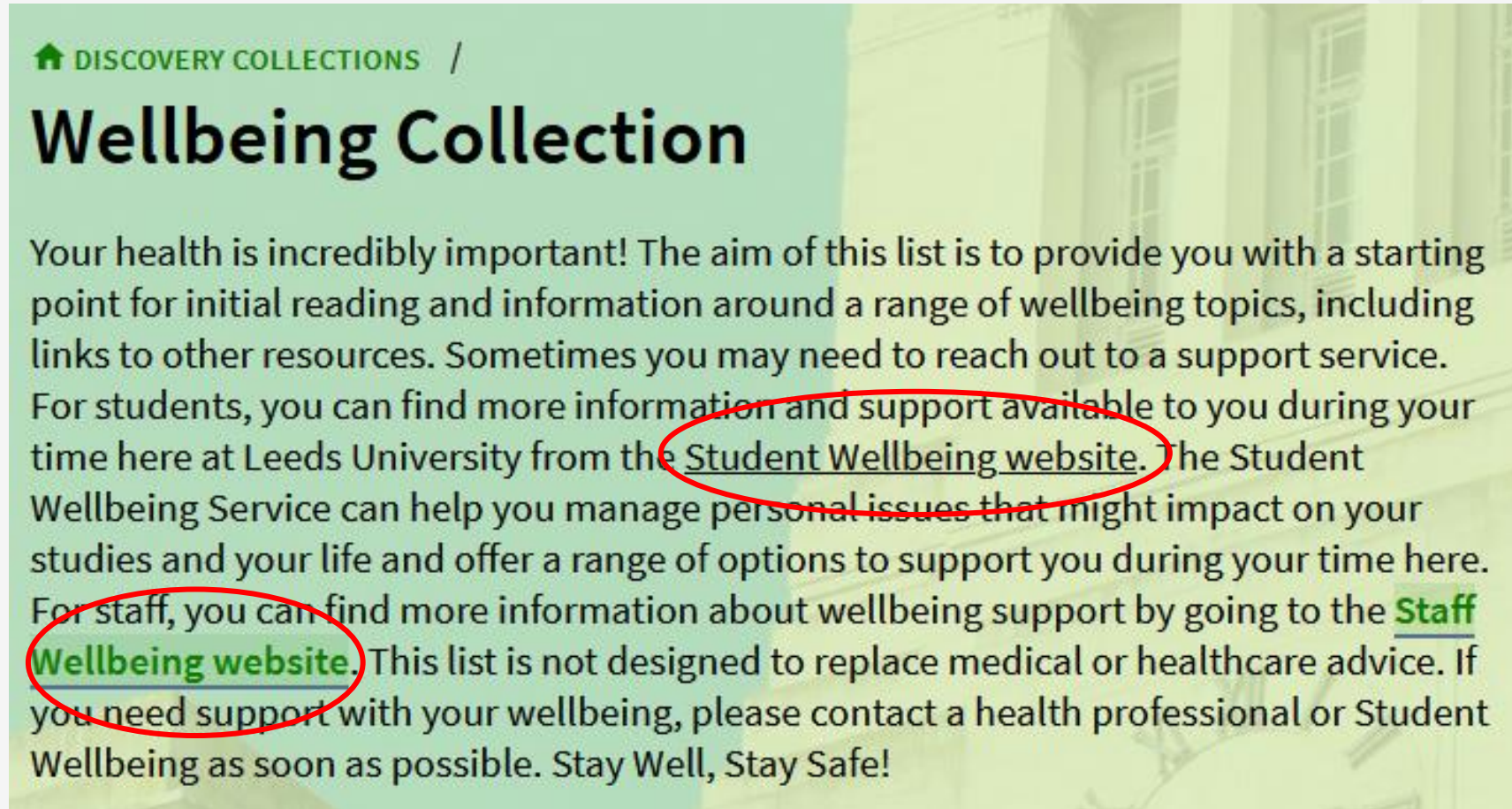
# Customising the display of a collection

---



# Customising the view in Primo

---



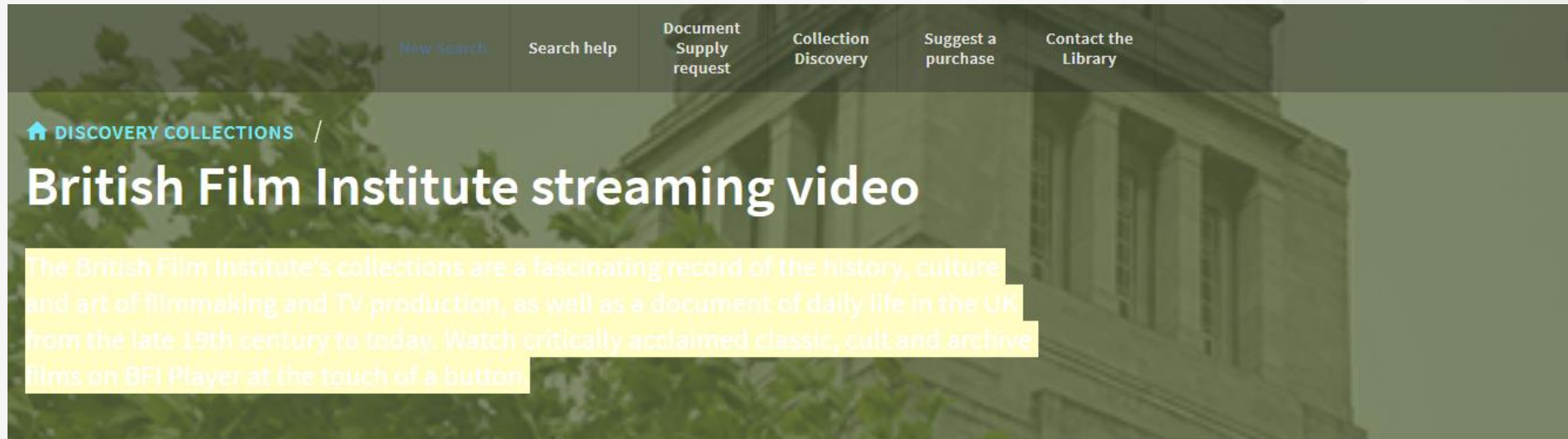
DISCOVERY COLLECTIONS /

## Wellbeing Collection

Your health is incredibly important! The aim of this list is to provide you with a starting point for initial reading and information around a range of wellbeing topics, including links to other resources. Sometimes you may need to reach out to a support service. For students, you can find more information and support available to you during your time here at Leeds University from the [Student Wellbeing website](#). The Student Wellbeing Service can help you manage personal issues that might impact on your studies and your life and offer a range of options to support you during your time here. For staff, you can find more information about wellbeing support by going to the [Staff Wellbeing website](#). This list is not designed to replace medical or healthcare advice. If you need support with your wellbeing, please contact a health professional or Student Wellbeing as soon as possible. Stay Well, Stay Safe!

New feature! HTML code in the collection descriptions allows for working links

# Customising the view in Primo

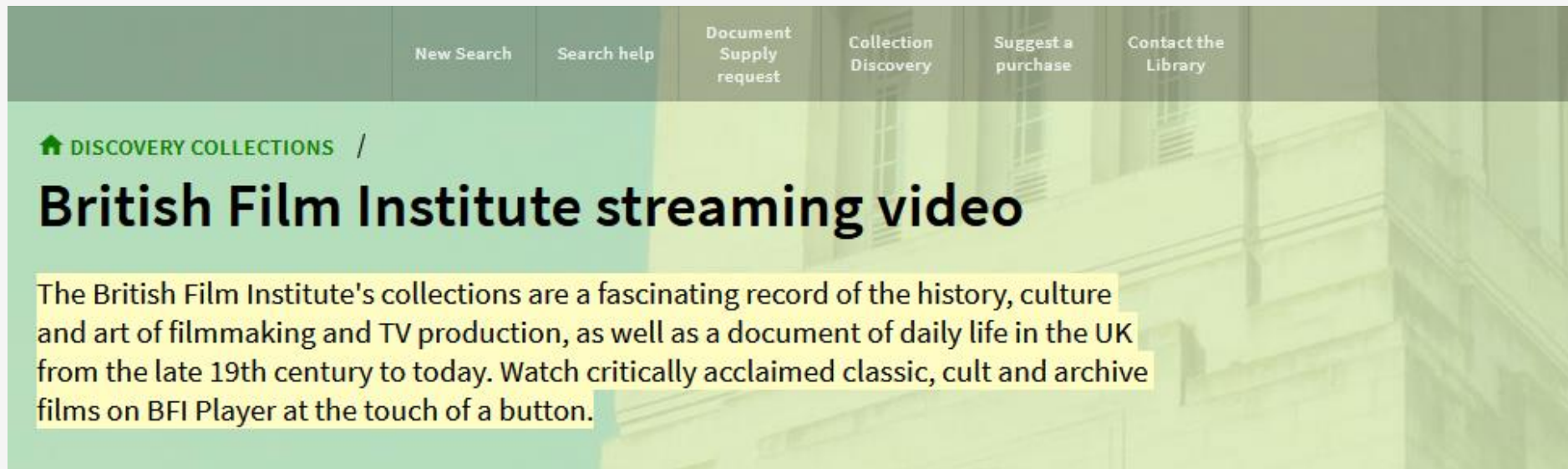


New Search Search help Document Supply request Collection Discovery Suggest a purchase Contact the Library

DISCOVERY COLLECTIONS /

## British Film Institute streaming video

The British Film Institute's collections are a fascinating record of the history, culture and art of filmmaking and TV production, as well as a document of daily life in the UK from the late 19th century to today. Watch critically acclaimed classic, cult and archive films on BFI Player at the touch of a button.



New Search Search help Document Supply request Collection Discovery Suggest a purchase Contact the Library







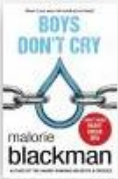

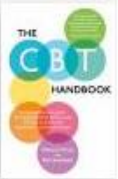

DISCOVERY COLLECTIONS /

## British Film Institute streaming video

The British Film Institute's collections are a fascinating record of the history, culture and art of filmmaking and TV production, as well as a document of daily life in the UK from the late 19th century to today. Watch critically acclaimed classic, cult and archive films on BFI Player at the touch of a button.

# Customising the view in Primo

Adding author and publication date to the gallery view

 <p>BOOK Aristotle and Dante discover the secrets of the universe</p>	 <p>BOOK A bear called Paddington</p>	 <p>BOOK The birds on the trees</p>	 <p>BOOK Blue genes : a memoir of loss and survival</p>	 <p>BOOK The bone sparrow</p>
 <p>BOOK The boy with the topknot : a memoir of love, secrets and lies in Wolverhampton</p>	 <p>BOOK Boys don't cry</p>	 <p>BOOK Break free from OCD</p>	 <p>BOOK The CBT handbook</p>	 <p>BOOK Cloud busting</p>

# Customising the view in Primo

---

Extract the author and publication date with JavaScript

Display the information with CSS






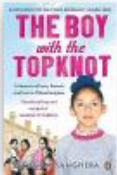
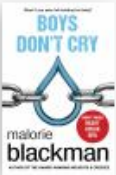



```
/* TJH Display of author and year in Discovery Collections */
prm-gallery-item-after {
padding-top: 20px;
padding-bottom: 20px;
padding-left: 0.5em;
padding-right: 15px;
display: block;
margin-top: -60px;
margin-bottom: 50px;
}

prm-gallery-item-after div {
margin-top: -10px;
display: -webkit-box;
-webkit-box-orient: vertical;
-webkit-line-clamp: 3;
overflow: hidden;
text-overflow: ellipsis;
font-size: small;
}
```

```
// Author and publication year in Discovery Collections
app.component('prmGalleryItemAfter', {
bindings: {
parentCtrl: '<'
},
controller: function () {
var $ctrl = this;
$ctrl.$onInit = function () {
try {
// $ctrl.author = $ctrl.parentCtrl.item.pnx.adddata.au[0];
// 245$c assigned to Local Display Field 59
$ctrl.author = $ctrl.parentCtrl.item.pnx.display.lds59[0];
} catch (e) {
$ctrl.author = '';
}
try {$ctrl.date =
$ctrl.parentCtrl.item.pnx.display.creationdate[0];
} catch (e) {
$ctrl.date = '';
}
$ctrl.hasDate = !!$ctrl.date;
$ctrl.hasAuthor = !!$ctrl.author;
};
},
template: `
<div><span ng-if="$ctrl.hasDate">{{ $ctrl.date }}</span><br />
<span ng-if="$ctrl.hasAuthor">{{ $ctrl.author }}</span></div>
`
});
// END author and publication year in Discovery Collections
```

# Customising the view in Primo

## Gallery view with author and publication date

 <p>BOOK <b>Aristotle and Dante discover the secrets of the universe</b></p> <p>2021 Benjamin Alire Sáenz.</p>	 <p>BOOK <b>A bear called Paddington</b></p> <p>2018 Michael Bond ; illustrated by Peggy Fortnum.</p>	 <p>BOOK <b>The birds on the trees</b></p> <p>1991 Nina Bawden.</p>	 <p>BOOK <b>Blue genes : a memoir of loss and survival</b></p> <p>2009 Christopher Lukas.</p>	 <p>BOOK <b>The bone sparrow</b></p> <p>2017 Zana Fraillon.</p>
 <p>BOOK <b>The boy with the topknot : a memoir of love, secrets and lies in Wolverhampton</b></p> <p>2009 Sathnam Sanghera.</p>	 <p>BOOK <b>Boys don't cry</b></p> <p>2011 Malorie Blackman.</p>	 <p>BOOK <b>Break free from OCD</b></p> <p>2011 Fiona Challacombe, Victoria Bream Oldfield and Paul Salkovskis.</p>	 <p>BOOK <b>The CBT handbook</b></p> <p>2015 Pamela Myles and Roz Shafran.</p>	 <p>BOOK <b>Cloud busting</b></p> <p>2005 Malorie Blackman ; illustrated by Helen van Vliet.</p>

# Roadmap/wishlist

---



2024 Roadmap – CDI and external records can be displayed in collection discovery

Wishlist items from the Idea Exchange:

- [Add facets into the Collection Discovery UI](#)
- [Sub-collection searches](#)
- [Add a button “View this collection as search results”](#)

# Useful resources

---



Primo Views website:

[https://primoviews.org/combined\\_code/collection-discovery/](https://primoviews.org/combined_code/collection-discovery/)



University at Buffalo's Collection Spotlights:

[https://search.lib.buffalo.edu/discovery/collectionDiscovery?vid=01SUNY\\_BUF:everything](https://search.lib.buffalo.edu/discovery/collectionDiscovery?vid=01SUNY_BUF:everything)



W3 Schools CSS Tutorial:

<https://www.w3schools.com/css/default.asp>



Primo mailing list:

<https://exlibrisusers.org/postorius/lists/primo.exlibrisusers.org/>



# Any questions?



[QR code for University of Leeds Discovery Collections top level page](#)

Ceilan Hunter-Green: [c.hunter-green@leeds.ac.uk](mailto:c.hunter-green@leeds.ac.uk)

Trevor Hough: [t.j.hough@leeds.ac.uk](mailto:t.j.hough@leeds.ac.uk)



**UNIVERSITY OF LEEDS**

Leeds University Library

Leeds, United Kingdom

LS2 9JT

Library no

[library.leeds.ac.uk](http://library.leeds.ac.uk)

# Alma permissions needed to work with Collections

---

- The following roles can work with collections:
  - **Collection Inventory Operator:** Create and edit sub-collections and move sub-collections between parent collections
  - **Collection Inventory Operator Extended** together with **Collection Inventory Operator:** Create, edit, and delete top level collections and promote a sub-collection to be a top-level collection. Create, edit, and delete sub-collection and move sub-collections between parent collections
  - **Digital Inventory Operator:** Add/remove titles to/from a collection and move a title between collections.
- To configure discovery options (Configuration Menu > Discovery) for Primo VE, you must be assigned the role **Discovery - Admin**.