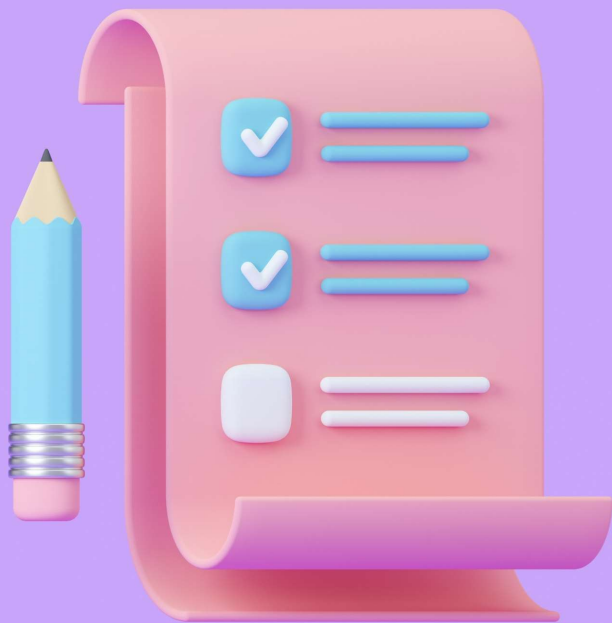# Using Collection Discovery to manage wellbeing and leisure print book collections

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Agenda

- Contexts
  - University of Exeter
  - Wellbeing and Leisure Collections
  - University of Exeter Library
- Project initiation and planning
  - Why start a new project?
  - What needs to be done?
- Doing the work
  - Creating collections in the Sandbox
  - Manual tidying work
- Measuring success

Contexts

University of Exeter
Wellbeing and Leisure Collections
University of Exeter Library

University *of* Exeter

- Located in South-west UK
- 30,000 students from over 150 countries
- 7,400 staff from over 100 countries
- Partnership with Falmouth University
- Strategy 2030: sustainable, healthy and socially just future

Manchester

Birmingham

London

Bristol

EXETER

Penryn

Truro

Green Flag Award
2023/24
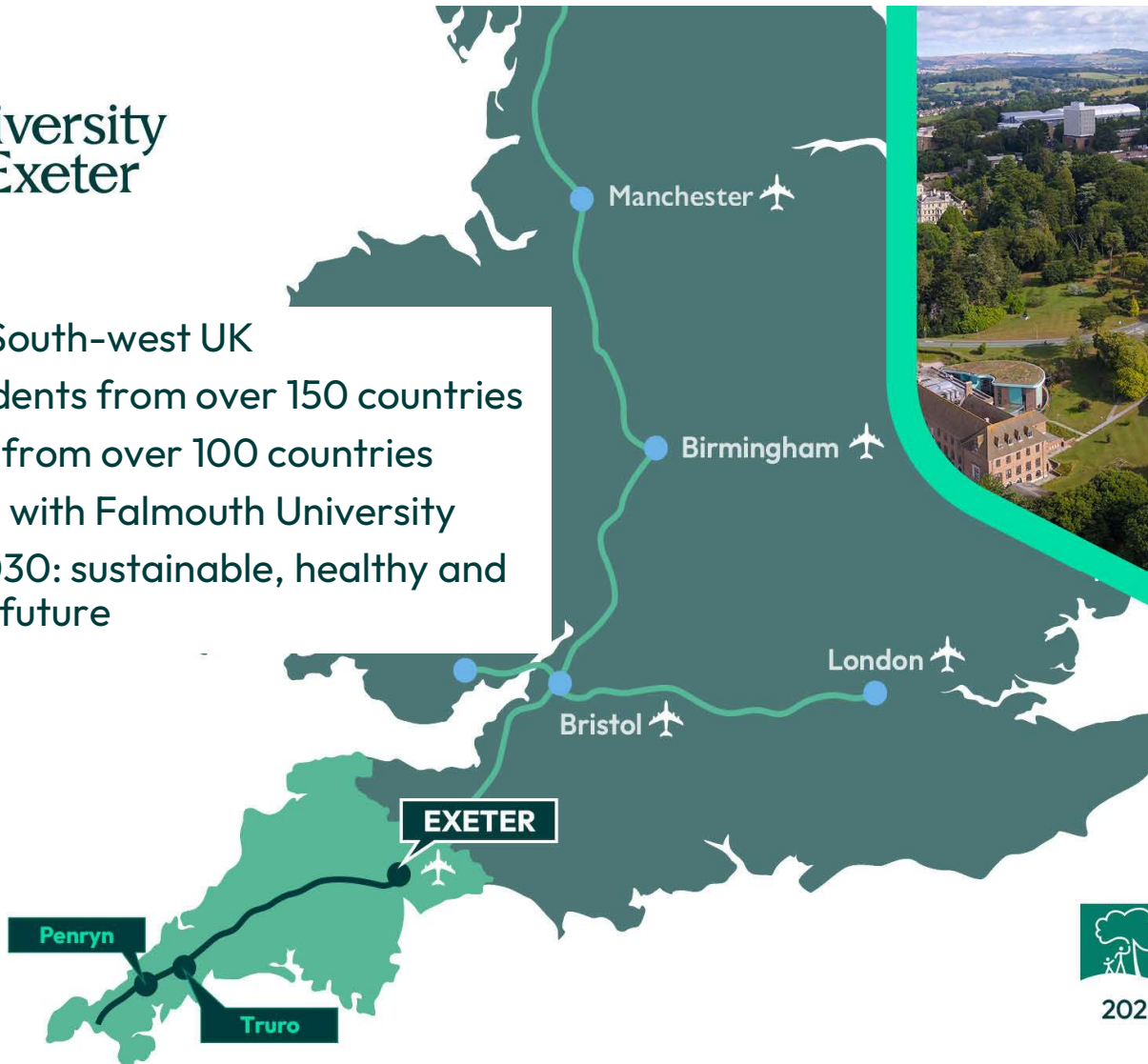
Cornwall
Pernyn
Penryn Campus

Truro
Knowledge Spa

Devon
Exeter
Streatham Campus
St Luke's Campus
RILD Building (Royal Devon and Exeter Hospital)
CSRC (Royal Devon and Exeter Hospital)

Wellbeing and Leisure Collections

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- A shift in how society thinks and speaks about mental health over the past decade or so
- Reading Well Scheme – booklist scheme beginning in public libraries in 2013
- Increasingly part of Academic Library services
  - Probably still mostly voluntary/interest-led, but hopefully beginning to be embedded in paid roles
- Physical and digital spaces; print, e-books, audiobooks; games; arts and crafts …
- Collaborations with wellbeing services, student union, students and staff, other libraries...

University of Exeter Library's Wellbeing and Leisure Collections

- LibGuide highlighting vast range of resources
  - Formats e.g. Audiobooks, e-books, digital resources, games collection, film & tv playlists
  - Topics e.g wellbeing, fiction, award winning books, exploring devon, graphic novels – all linking to curated reading lists on Talis
- Permanent displays
  - Wellbeing and Leisure; Exploring Devon; Study Skills; Climate Emergency
- Temporary displays
  - Calendar of annual events including Black History Month, LGBT+ Pride, South Asian Heritage Month
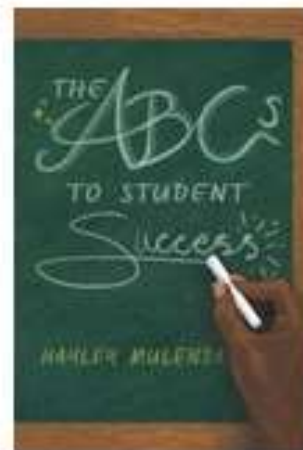- University of Exeter Library went live with Ex Libris systems in July 2023

Project initiation and planning

Why start a new project?
What needs to be done?

Why start a new project?

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- Project aims:
  - To promote the wellbeing and leisure collections
  - To see if manual processing of new print items and temporary displays can be streamlined
  - To share findings with the wider team so they can consider ways they might use this feature and save staff time in figuring out how to do it!
- To connect our new discovery platform (Primo VE) to the physical resources, LibGuides, and Talis lists to increase reach.
- Strict scope
  - Define collections using existing Talis lists
  - Print books only

What needs to be done?

- Create examples in the Sandbox
  - Collections and sub-collections
  - Using logical sets so the collections update automatically when physical items are processed
  - Use internal note fields to create the sets
  - Steps which would have been done to the item anyway to prepare for use in lists and displays
- Manual tidying in live Alma environment
  - Cross-check between Talis and Alma to ensure all items are captured
  - Check holdings: location and classmark prefix
  - Check item notes: fulfilment note ('Return to Display Stand') and internal notes identifying topics and displays the item is part of
- Get team feedback, make changes, go live, measure success!

Doing the work

Create examples in Sandbox
Manual tidying in live Alma

Creating collections in the Sandbox

1. Create logical sets of physical titles
2. Create a default itemized collection
    a. Activate the Synchronize All Logical Collections Job
3. Create top-level collections
    a. Add titles (if required) using logical sets
4. Add sub-level collections
    a. Add titles using logical sets
- Upload thumbnail images so it looks nice
- Be aware of Sandbox refresh times

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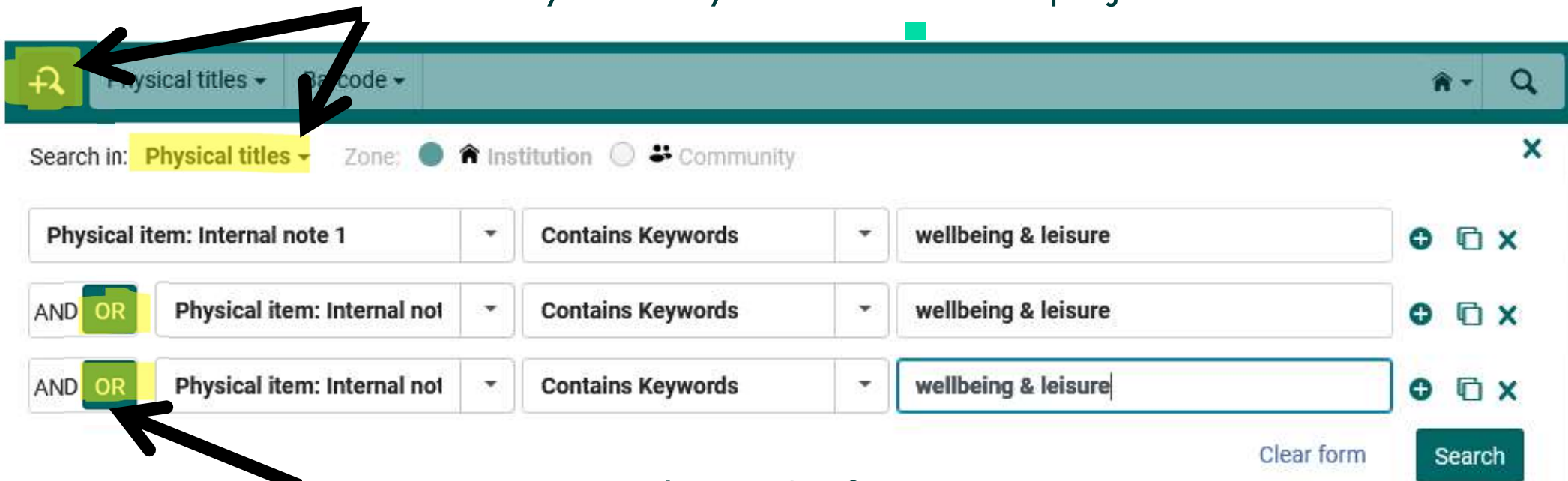|	
Study Skills Internal Note 🔍 Logical	Physical titles Institution only Created by 👤 Created On 07/(16:00:26 BST
Exploring Devon Internal Note 🔍 Logical	Physical titles Institution only Created by 👤 Created On 07/(15:59:43 BST
Wellbeing & Leisure Internal Note 🔍 Logical	Physical titles Institution only Created by 👤 Created On 07/(15:58:39 BST

1. Example query for logical set

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You'll probably use the Advanced Search
I have only used Physical Titles for this project

Search in: **Physical titles** ▾   Zone: ● 🏠 Institution ○ 👥 Community   ✕

Physical item: Internal note 1	▾	Contains Keywords	▾	wellbeing & leisure	➕ 🗐 ✕
AND **OR**	Physical item: Internal not	▾	Contains Keywords	▾	wellbeing & leisure	➕ 🗐 ✕
AND **OR**	Physical item: Internal not	▾	Contains Keywords	▾	wellbeing & leisure	➕ 🗐 ✕

Clear form   **Search**

Very important to choose OR for
this one otherwise you get no results

2. Default itemized collection

Go to **Manage Collections**
Click **Add Top-Level Collection**
- Title **Default Itemized Collection**
- Check **Suppress from Discovery**
- Name **Default Itemized Collection**
- Choose a Library
- **Save**

Collection Name	Description	Creation Date
Wellbeing & Leisure Collections	-	07/09/2024 15:16:19 BST
Annual Displays	-	07/09/2024 22:22:58 BST
Default Itemized Collection	Required to create logical collections. This is the default itemized collection to allow the Synchronize All Logical Collections job to run. REMEMBER TO TICK 'SUPPRESS FROM DISCOVERY'	07/09/2024 15:26:00 BST

0 rows selected   ⊕ Add Top-Level Collection   Move Selected   Reorder Selected ▾

In Alma configuration
- Go to **Resource Management Jobs Configuration**
- Link default itemized collection to **Synchronize All Logical Collections Job**

Synchronize All Logical Collections Job

Status   🔴 Active   ○ Inactive   Default Collection * [Default Itemized Collection] ✕ ☰ ↺ ⓘ

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3. Adding Collections

Top-level and sub-level collections have the same requirements

Title
- will be the 245 $a of the Collection's bibliographic record
- it is recommended that this is the **same as the Collection Name**
- Must be unique among all top-level collections

Check the **Logical Collection** box

Top Level Collection

Bibliographic Record Information

Record Format	MARC21 Bibliographic
Title *	
Suppress from Discovery	☐

General Information

Name *	
Description	
Library *	☰ ⟲
Logical Collection	☐
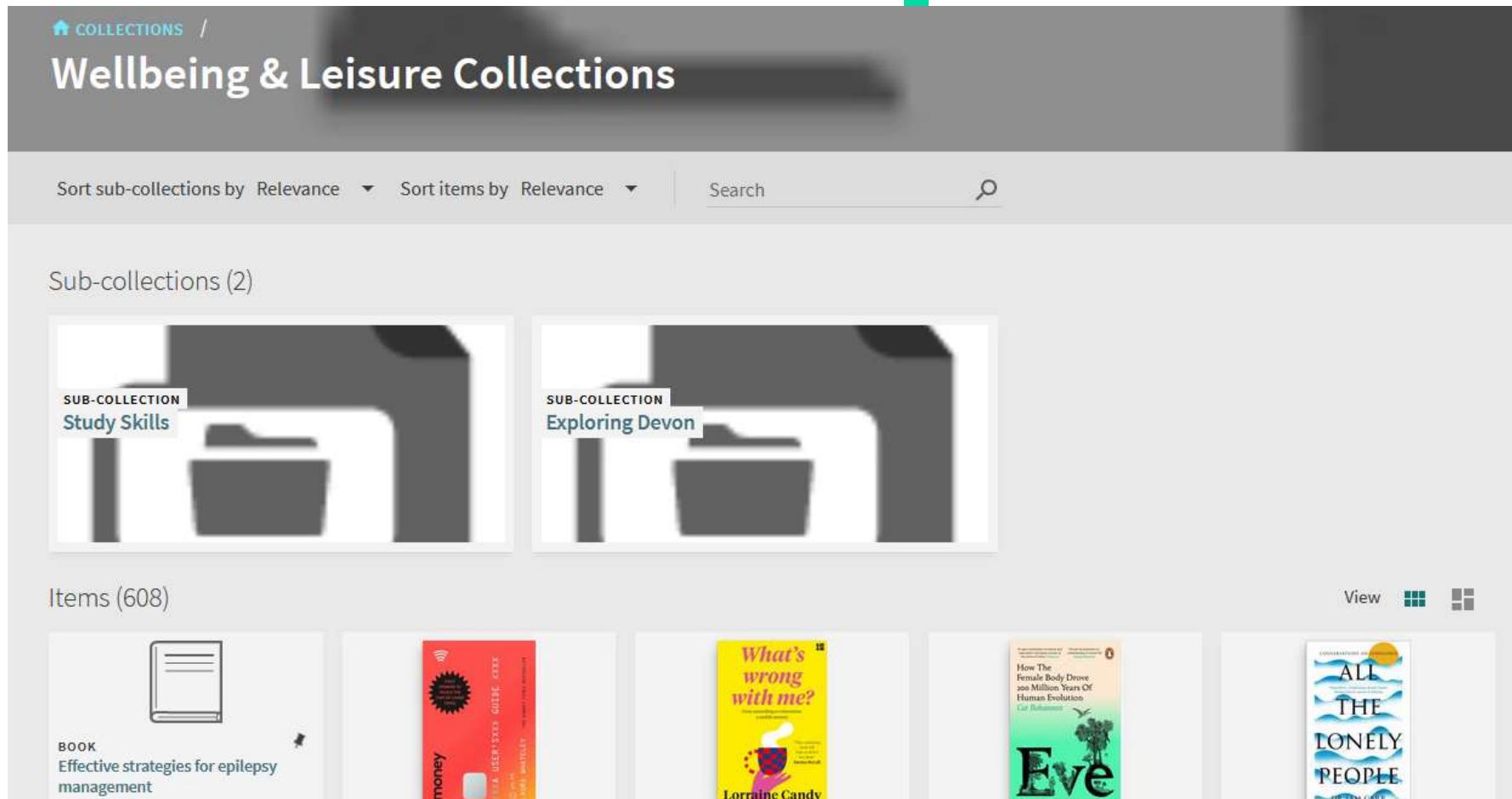
External System

Thumbnail Upload

3a. A top-level collection with both titles and sub-collections

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COLLECTIONS /

Wellbeing & Leisure Collections

Sort sub-collections by Relevance ▼   Sort items by Relevance ▼   Search 🔍

Sub-collections (2)

SUB-COLLECTION
Study Skills

SUB-COLLECTION
Exploring Devon

Items (608)   View ▦ ▥

BOOK
Effective strategies for epilepsy management

What's wrong with me?
Lorraine Candy

How The Female Body Drove 200 Million Years Of Human Evolution
Eve

ALL THE LONELY PEOPLE

Manual tidying work

Work through print books in Talis lists and check each item in Alma for:

- Correct location e.g. FORUMWELL
- Classmark prefix e.g. Study Skills Display
- Fulfilment note 'Return to Display Stand'
  - Permanent display items only
- Internal note/s
  - Wellbeing & Leisure – on all items
  - Some items fall under more than one collection
  - If there are more than 3 notes needed can use pipe key "|" to separate collection names

Measuring success

- Is the processing easier?
  - Steps/time taken for processing new items and setting up temporary displays
- Is there increased:
  - Traffic to LibGuide/Talis
  - Borrowing of print
  - Usage of e-
  - Book recommendations
  - Engagement and feedback
- Will other teams use it?
  - Integrate import profiles with collections for e.g. Special Collections, Archives

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Thank you for listening.

Any questions?

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