## **Esploro**

## **How to Add Collections of Assets to Your Portal**

With Research Collections you can showcase a group of research assets with a common theme. Each collection has a title and, optionally, an image and a description.

This collection, for example, contains this year’s physics department publications. Click the title to open it. Here, you can see all the assets in this collection. Search facets appear on the side, if they are enabled for this collection. We will show that configuration option later, when we demonstrate adding a collection.

Click on an asset to see the full record. An asset can belong to more than one collection. Collections that this asset belongs to are noted here, if enabled. Click the collection title to view that collection page. This is a nice way to lead portal visitors from one asset of interest to another.

For collections that you particularly want to spotlight, you can mark them as Featured collections. These appear at the top of the Collections page. Scroll down to see All collections.

Here’s how to add a collection.

The first step is to create a set of assets that will form the collection. See the Esploro Essentials video **Searching, Creating Sets, and Basic Navigation** for an explanation of how to create a set in Esploro.

Note that you can make an itemized set, which is a list of selected assets, or a logical set, which is the result of a particular search.

An advantage to using a logical set for a collection is that it will be updated on an ongoing basis. In our example of the collection of physics publications from this year, if it was based on a logical set, then as new articles are published and added to the repository, they will be included in the collection.

After the set of assets has been defined, the next step is to add the set as a collection.

Open the Admin menu and select Collection Configuration. On this page you can see all the collections that have been created. To create a new one, click Add Collection.

Fill in the Name, which is the title of the collection that will be displayed, and the Code, which will be part of the URL.

Select the set.

Optionally, select an image and enter a description.

These options give you control over the display of this collection.

* Choose to Include search facets and sort, or not.
* Whether to include this collection in the “Featured Collections” section, both on the homepage, and at the top of the Collections page.
* Whether to include the collection name when viewing the full record of the asset.

When you are done, remember to Save.

It takes time to index all the assets, so you may not see your newly created collection on the portal right away. You also need to enable the new collection with the toggle switch.

You can change the order of the collections, enable or disable them. Use the row action menu to see the URL for the page, as well as to Edit, View, or Delete it.

That is how to set up the collections page of the portal.

Research Portal visitors can access collections in several ways, if each has been configured.

Open the menu and then click Research Collections.

Or, in the first section of the Homepage, click Research Collections.

Here’s how to configure these. In the Configuration Area, open the Portal and Profiles menu. Select Header and Footer Configuration. In the Entities section, ensure that Research Collections is enabled.

Portal visitors can also see featured Research Collections in a section of the homepage. Here you can click on a collection or Browse more collections.

From that same configuration page, open the Homepage tab. Find Featured Collections and ensure that it is active.

That’s how to add collections of assets to your portal.