Collection Discovery

Note
This information is not applicable to Primo VE environments. For more details on Primo VE configuration, see Primo VE.

Collection Discovery is a feature in Primo that enables users to navigate the hierarchy of collections and subcollections to locate and view their associated items. The following rules apply to collections:

- A top-level collection is the main collection. It cannot belong to another collection.
- A subcollection is a collection that belongs to another collection. It may not belong to more than one collection.
- The items are your inventory and may belong to one or more collections.

Users can use the following methods to discover collections:

- The Collection Lobby is a page dedicated to collection discovery in the Front End. It may display all of your institution's collections, a specific collection, or a collection's subcollections. Ultimately, this hierarchy allows users to view a collection's inventory in the standard results page.
- The Primo Search Box allows users to search for collections in the existing scopes or with a dedicated collection scope (if enabled for the view). In the search results, collections contain a link that opens the collection in the Collection Lobby, and for both collections and items, the Details tab displays the complete collection path.

This section contains the necessary information to configure collection discovery for Alma and Rosetta.

Configuring Discovery for Alma Collections

This section contains the steps needed to enable Alma collection discovery in the Front End. Many of the configurations are out of the box and are explained in Configuration Details for Collection Discovery.

To configure discovery for Alma collections:

1. Update your normalization rules in the Primo Back Office to include the changes associated with collection discovery. For more information, see Alma MARC Normalization Rules.
2. Create a set of digital titles in Alma:
   1. Run an Advanced search for Digital Titles where IE PID is greater than 1.
2. Click Save Query, specify a set name (all digital titles), set Status to Active, and then click Save.

3. Run publishing in Alma:
   1. On the Jobs List page (Administration > Manage Jobs > Run a job), select Primo Republish Set of Titles and then click Next.
   2. Select the set you created (for example, all digital titles) and then click Next.
   3. Click Next.
   4. Schedule the job to run as soon as possible and then click Next.
   5. Click Submit.

4. In the Institution Wizard (Primo Home > Ongoing Configuration Wizards > Institution Wizard), set the Collection field under the Delivery Base URLs section to the same value as the API field.

5. Add the Collection Discovery button to the Main menu in the Front End:
   2. On the Tiles Configuration page in the Views Wizard, edit the Home Page > Main Menu tile.
3. On the Edit Main Menu Attributes page, specify the following fields under the Create New Label section and then click Add:

- **Label** - Specify Collection Discovery.
- **URL** - Specify the following URL:
  
  **Classic UI:**
  
  /action/collectionDiscovery.do?vid=<your view>&colayout=grid&inst=<your institution>
  
  **New UI:**
  
  /primo-explore/collectionDiscovery?vid=<View_Code>
  
- **Link should open in** - Select current window from the drop-down list.

6. If you want to configure the display settings or localize any of the labels on the Front End, see Collection Discovery Configuration and Labels.

7. If you want users to be able to search the dedicated collection scope, add it to your view in the Views Wizard (Primo Home > Ongoing Configuration Wizards > Views Wizard).

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**Configuring Discovery for Rosetta Collections**

This section contains the steps needed to enable Rosetta collection discovery in the Front End. Many of the configurations are out of the box and are explained in Configuration Details for Collection Discovery.

**To configure discovery for Rosetta collections:**

1. Update your normalization rules. For more information, see Rosetta Normalization Rules.

   In addition, verify that the normalization rules map the Primo Institution Code to the delivery/institution field in the PNX record. For example:
2. Publish all collections and items from Rosetta.

3. Run both pipes from the Primo Back Office: collection pipe and item pipe. For more information, refer to the following document:

   https://developers.exlibrisgroup.com/rosetta/integrations/PrimoCollections

   Since there is no option to selectively harvest just the collection and its items (assuming that the items have already been published to Primo), it will be necessary to run a complete set of all records.

4. In the Institution Wizard (Primo Home > Ongoing Configuration Wizards > Institution Wizard), set the Collection field under the Delivery Base URLs section to the Rosetta base URL and port (for example, http://il-dps12:1801).

5. Configure the ILS adaptor to support collections:
   1. On the All Mapping Tables page, edit the ILS Adaptors Template mapping table under the ILS Gateway subsystem (Primo Home > Advanced Configuration > All Mapping Tables)
   2. Configure the ILS adaptor template settings:

      For an Alma ILS, update the following fields in the row containing the ALMA_01_0028 ID:
      - XSLT file – Change to get_collections_rosetta.xsl.
      - Call Template – Change to {{collection_base}}/delivery/services/collections

      For a Voyager ILS, create and enable the following mapping row:
      - ID – Enter a unique ID.
      - Adaptor ID – Enter VOYAGER_7.
      - Service Name – Enter get_collections.
      - XSLT file – Enter get_collections_rosetta.xsl.
      - Call Template – Enter {{collection_base}}/delivery/services/collections

6. Add the Collection Discovery button to the Main menu in the Front End:
2. On the Tiles Configuration page in the Views Wizard, edit the Home Page > Main Menu tile.

3. On the Edit Main Menu Attributes page, specify the following fields under the **Create New Label** section and then click **Add**:
   - **Label** - Specify **Collection Discovery**.
   - **URL** - Specify the following URL:
     
     /action/collectionDiscovery.do?vid=<your view>&colayout=grid&inst=<your institution>
     
     - **Link should open in** - Select **current window** from the drop-down list.

7. For the February 2016 release, update the delivery mapping tables:
   1. Add the following row to the GetIT! Link 1 Configuration mapping table:

```
<table>
<thead>
<tr>
<th>Enabled</th>
<th>Delivery Category Code*</th>
<th>Availability Status Code*</th>
<th>Data Source Code*</th>
<th>Direct Link to online resource</th>
<th>Link field in PMX</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

**GetIT! Link 1 Configuration Mapping Table**

2. Add the following row to the GetIT! Tab 1 Text Configuration mapping table:

```
<table>
<thead>
<tr>
<th>Enabled</th>
<th>Delivery Category Code*</th>
<th>Availability Status Code*</th>
<th>Data Source Code*</th>
<th>Tab 1 Label Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>defaultlinkcollection</td>
<td></td>
</tr>
</tbody>
</table>
```

**GetIT! Tab 1 Text Configuration Mapping Table**

8. If you want to localize any of the labels on the Front End, see [Collection Discovery Labels](#).

9. If you want users to be able to search the dedicated collection scope, add it to your view in the Views Wizard (Primo **Primo**).
Refreshing the Collection API

The Collection API communicates with Alma and Rosetta to get information regarding their local collections. The API returns the complete collection hierarchy and the key information for every collection including the collection title, description, and link to the thumbnail. Primo refreshes this information every hour.

To refresh the collection information manually:

1. In the Institution Wizard (Primo Home > Ongoing Configuration Wizards > Institution Wizard), edit your institution.
2. Next to the Collection field in the Delivery Base URLs section, click Refresh Collection API Response.

Creating Deep Links for Collection Discovery

You can use the following URL to create a deep link for the Collection Discovery page:

- **Classic UI:**
  
  http://<Primo server and port>/primo_library/libweb/action/collectionDiscovery.do?vid=<view ID>&inst=<institution>&colayout=<type>

- **New UI:**
  
  http://<Primo server and port>/primo-explore/collectionDiscovery?vid=<view_ID>&collectionId=<collection_ID>&lang=<lang>

Collection Discovery deep links support the following parameters:

- **vid** – the view ID.
- **inst** – the institution of the view.
- **colayout** – (Classic UI only) the format of the collections in the Collections Lobby. Specify either **grid** or **list**.
- **collectionId** (optional) – the ID of the collection to which you want to give focus on the page.

Examples:

- **Classic UI:**
  

- **New UI:**
  
Disabling the Collection Path

The Full Display page displays the full collection path for collections and their inventory out of the box.

If you do not want to display the collection path:

2. On the Tiles Configuration page in the Views Wizard, edit the Full Display > Full Results tile.
3. On the Edit Full Details Attributes page, edit the Collection Discovery field.
4. Select Delete to remove the field from the Full Display page.

Configuration Details for Collection Discovery

This section describes the out-of-the-box configurations as well as the configurations that may require your attention to enable collection discovery in the Primo Front End.

Alma MARC Normalization Rules

This section describes the normalization rules that are used for Alma collection discovery. The changes are included in the Alma MARC - Template, but you may need to update these rules manually if you have localized your normalization rules. For information regarding normalization rules sets, see The Normalization Rules Sets Page.

To support collection discovery, Alma publishes the following information about collections:

1. The COL field includes the following subfields:
- **a** - parent collection ID
- **b** – collection title
- **c** – collection name
- **A** – the owning institution. Currently, this field is added only for centralized publishing, but it will be used for standard publishing in the future.

For example:

```xml
<datafield tag="COL" ind1=" " ind2=" ">
  <subfield code="a">81160000000151</subfield>
  <subfield code="b">Photographs of America</subfield>
  <subfield code="c">Photographs of America</subfield>
  <subfield code="A">WST</subfield>
</datafield>
```

2. For standard publishing, collections are indicated by a value of **C** in INT subfield **a**.

3. For centralized publishing, collections are indicated by a value of **C** in INST subfield **b**.

The following table lists the relevant changes to the Alma normalizations rules. Refer to the Alma MARC Template for complete details.

<table>
<thead>
<tr>
<th>PNX Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>control/colldiscovery</td>
<td>Rules map information from the COL field.</td>
</tr>
<tr>
<td>display/type</td>
<td>Rule creates the type='collection' based on INT $$a=C / INST $$b=C</td>
</tr>
<tr>
<td>search/cdparentid</td>
<td>Rules map information from COL $$a unless the record is a collection (i.e only items are included).</td>
</tr>
<tr>
<td>search/searchscope</td>
<td>Rules create the collections search scope, which is based on the existence of the COL field/resource type='collection.</td>
</tr>
<tr>
<td>dedup/t</td>
<td>Because collections should not be deduped, a rule was added set t to 99 for collections.</td>
</tr>
<tr>
<td>delivery/delcategory</td>
<td>Rules map the Alma-C delivery category.</td>
</tr>
</tbody>
</table>

---

**Rosetta Normalization Rules**

This section describes the normalization rules that are used for Rosetta collection discovery. The changes are included in
the Rosetta - Template, but you may need to update these rules manually if you have localized your normalization rules.

To support collection discovery, Rosetta publishes the following information about collections:

1. The ID of the parent collection is indicated by the dcterms:isPartOf field when xsi=collection. This is included in subcollections and item records.

2. The dc:type field indicates whether the record is a collection.

Refer to the Rosetta documentation for harvesting instructions.

For example:

```
<dc:type>collection</dc:type>
<dcterms:isPartOf xsi:type="collection">16017873</dcterms:isPartOf>
```

The following table lists the relevant changes to the Rosetta normalizations rules. Refer to the Rosetta - Template for complete details.

<table>
<thead>
<tr>
<th>PNX Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>control/colldiscovery</td>
<td>Rules for this field are based on the dcterms:isPartOf field and dc:type fields. This field also uses the PNX delivery/institution field. It is recommended to add rules for this field if they are not already defined.</td>
</tr>
<tr>
<td>display/type</td>
<td>Rule creates the type='Collection' based on dc:type=collection.</td>
</tr>
<tr>
<td>search/cdparentid</td>
<td>Rules map the ID from the from dcterms:isPartOf unless dc:type=collection (only items are included in this index).</td>
</tr>
<tr>
<td>search/searchscope</td>
<td>Rules create the collections search scope, which is based on the existence of either dc:type='collection' or dcterms:isPartOf.</td>
</tr>
<tr>
<td>delivery/delcategory</td>
<td>Rules map the Collection delivery category based on dc:type=&quot;collection.&quot;</td>
</tr>
</tbody>
</table>

**Availability and Delivery for Collections**

Delivery categories have been added to support collection discovery for Alma and Rosetta, respectively: **Alma-C** and **Collection**.

The following table lists the changes to the Delivery mapping and code tables to support collections:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
</table>

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Mapping Tables:

The following mapping rows configure the delivery links for Alma and Rosetta collections, respectively:

1. Delivery Category Code: Alma-C, Data Source Code: ALL, Direct link to online resource: Y, Link field in PNX: linktocollection
2. Delivery Category Code: Collection, Data Source Code: ALL, Direct link to online resource: Y, Link field in PNX: linktocollection

GetIt! Tab 1 Text Configuration

The following mapping rows configure the text for the Alma and Rosetta delivery links, respectively:

1. Delivery Category Code: Alma-C, Data Source Code: ALL, Tab 1 Label Code: linktocollection
2. Delivery Category Code: Collection, Data Source Code: ALL, Tab 1 Label Code: linktocollection

Templates

The following mapping row configures the template that is used to create the Alma and Rosetta delivery links:

- Code: linktocollection
- Template Code:
  - Classic UI: {{primo_base_external}}/primo_library/libweb/action/collectionDiscovery.do?collectionId={{coll_id}}&vid={{view}}&colayout=grid&inst={{coll_institution}}
  - New UI: {{primo_base_external}}/primo-explore/collectionDiscovery?collectionId={{coll_id}}

Code Tables:

The following table lists the codes used for the delivery of collections:

<table>
<thead>
<tr>
<th>GetIt! Tab1 Code</th>
<th>GetIt! Tab1 Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>default.linktocollection</td>
<td>View Collection</td>
</tr>
<tr>
<td>default.nui.getit_full.</td>
<td>Display Collection</td>
</tr>
<tr>
<td>default.nui.brief.results.tabs.expandCollections</td>
<td>View all collections</td>
</tr>
<tr>
<td>default.nui.brief.results.tabs.moreCollection</td>
<td>More from the same collection</td>
</tr>
<tr>
<td>default.nui.brief.results.tabs.collectionTab</td>
<td>Collection</td>
</tr>
</tbody>
</table>

Collection Discovery Configuration and Labels

The following table lists the changes to the mapping and code tables to support collection discovery:
<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mapping Tables:</strong></td>
<td></td>
</tr>
<tr>
<td>Format mean</td>
<td>The following row defines the Collections resource type: collection &gt; collections</td>
</tr>
<tr>
<td>Pre_filter</td>
<td>The following row defines the pre-filter drop-down list value: collection &gt; collections</td>
</tr>
<tr>
<td>facet_rtype_values</td>
<td>The following row defines the Collections value under the Resource Type facet: Collections &gt; collections</td>
</tr>
<tr>
<td><strong>Collection Discovery</strong></td>
<td></td>
</tr>
<tr>
<td>Collection Discovery Configuration</td>
<td>The <strong>Use Collection-specific display</strong> parameter indicates whether to display collection-specific display lines in the brief results for records that have the following settings: display/type = collection and delivery/delcategory = Alma-C or collection. The valid values are:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Yes</strong> (default) – Displays a link to the collection and overrides the display line settings for the brief results in the Views Wizard and instead displays the following information:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Title</strong>: display/title</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Description</strong>: display/description</td>
</tr>
<tr>
<td></td>
<td>• <strong>No</strong> – Uses the display line settings for the brief results in the Views Wizard.</td>
</tr>
<tr>
<td>Code Tables:</td>
<td></td>
</tr>
<tr>
<td>Collection Discovery</td>
<td>This new code table (Front End subsystem) defines the labels on the Collection Discovery page.</td>
</tr>
<tr>
<td></td>
<td>The following code displays the first node in the collection path and in the full display of an item: default.colldiscovery.colpath.topnode &gt; Collections</td>
</tr>
<tr>
<td></td>
<td>The following code displays the View Collection link on top-level collection page of the Collections Lobby: default.colldiscovery.viewcoll.toplevel &gt; View collection</td>
</tr>
<tr>
<td></td>
<td>The following code displays the View Collection link on a subcollection page of the Collections Lobby: default.colldiscovery.viewcoll.sub &gt; View collection</td>
</tr>
<tr>
<td></td>
<td>The following code displays the View Items link in the Collections Lobby: default.colldiscovery.viewitems &gt; View items</td>
</tr>
</tbody>
</table>
### View Labels

The following code displays the link to the collection discovery from the Main menu in the Front End:

`default.mainmenu.label.colldiscovery > Collection Discovery`

### Icon Codes

The following code displays the resource type:

`default.mediatype.collection > Collection`

### Full Display Labels

The following code displays the collection in the full display for an item:

`default.fulldisplay.collection > Collection`

### Basic Media type

The following code displays the pre-filter option for basic searches:

`default.search-simple.mediaType.option.collections > Collections`

### Advanced Media type

The following code displays the pre-filter option for advanced searches:

`default.search-advanced.mediaType.option.collections > Collections`

### Facet Resource Type

The following code displays the facet resource type for collections:

`default.facets.facet.facet_rtype.collections > Collections`

---

## More from the Same Collection

The More from the same Collection section on the Full Display page allows users to expand the search of the current title to other items in the collection and in additional collections that also contain the current title.

### More from the Same Collection Section

The top half of this section lists all collections to which this titles belongs. A maximum of six collections display initially. Users can select the **View all collections** icon to view the remaining collections. Users can select a collection to open its Collection page, which allows them to view a collection’s items and subcollections.

The bottom half of this section allows users to browse items that belong to the item’s related collections. Users can select any of the following:
• the Previous and Next arrows to scroll through the items.
• an item in the list to open its Full Display.

**Configuration Options**

The following table lists the settings used to configure this functionality.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Views Wizard</td>
<td>To enable this functionality in the new Primo UI, select the following field in the General section of the Views Wizard: <strong>More from the same Collection</strong>.</td>
</tr>
<tr>
<td>Aria Labels</td>
<td>The following code was added to support accessibility for this functionality:</td>
</tr>
<tr>
<td></td>
<td>• default.nui.aria.moreFromTheSame.collection.tab: Navigate to More From The Same Collection</td>
</tr>
<tr>
<td>GetIT! Tab1 code</td>
<td>The following codes were added to support this functionality:</td>
</tr>
<tr>
<td>table</td>
<td>• default.nui.brief.results.tabs.moreCollection: More from the same Collection</td>
</tr>
<tr>
<td></td>
<td>• default.nui.brief.results.tabs.collectionTab: Collection</td>
</tr>
<tr>
<td></td>
<td>• default.nui.brief.results.tabs.expandCollections: View all collections</td>
</tr>
</tbody>
</table>