

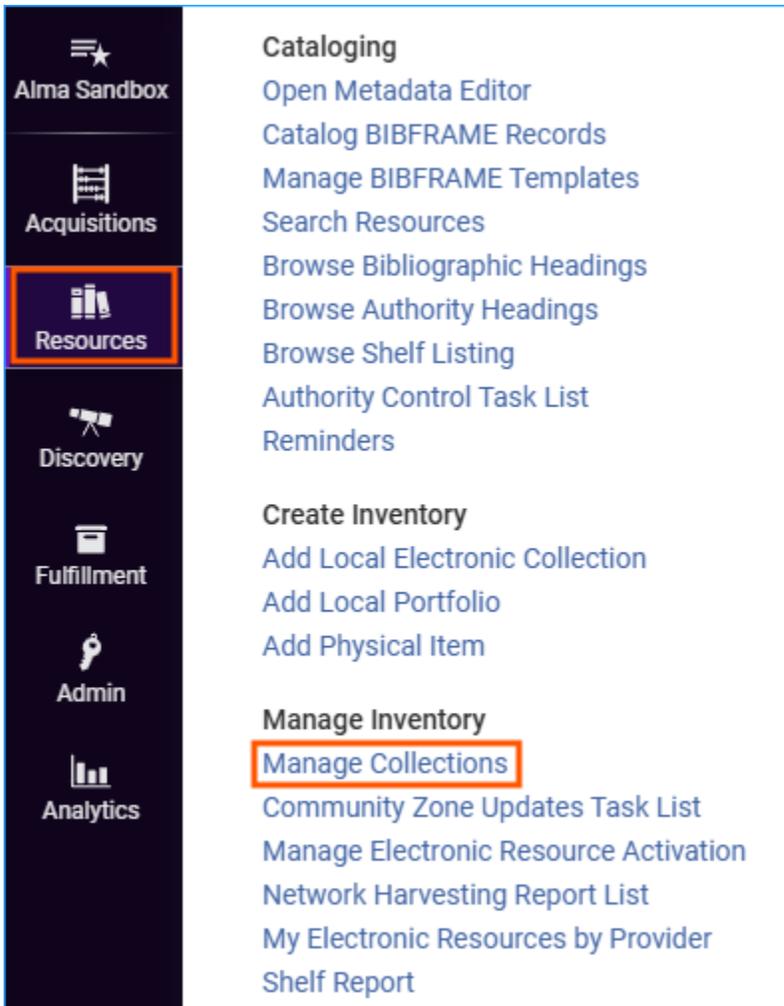
Setting up Discovery Collections

You will need the role: Collection Inventory Operator and Collection Inventory Operator Extended

You can set up your discovery collections all at the top level, or collections can be nested. You can have a top level collection with subcollections inside it. Collections can be moved into other collections.

Part 1: Setting up a discovery collection

To set up a collection go to Resources > Manage Inventory > Manage Collections.



If your institution already has collections, they will appear on this screen.

Click +Add Top-Level Collection to create a new collection.

Top Level Collections

1 - 18 of 18 Sort By ▾

0 rows selected [+ Add Top-Level Collection](#) [Move Selected](#) [Reorder Selected ▾](#) [Share](#) [Settings](#)

		Collection ID	MMS ID	Collection Name	Description	Creation Date	
1	<input type="checkbox"/>	8160608290006067	9984501557006067	October-December 2025 New Materials	-	12/08/2025 02:09:52 PM, CST	<input type="button" value="⋮"/>

The Collection form appears:

Add New Collection Save and continue Cancel Save

Top Level Collection

Bibliographic Record Information

Record Format: MARC21 Bibliographic

Title * **National Book Award Winners**

Suppress from Discovery

General Information

Name * **National Book Award Winners**

Description: Collection of National Book Award Winners

Library * **Bismarck State College Lib**

External System:

External ID:

Logical Collection

Thumbnail Upload: 

Place at/before: **Bottom**

Forms

Record Format: MARC21 Bibliographic

Deposit: -

Staff-Mediated Deposit: -

Add Representation: -

The top section is Bibliographic Record Information- This collection will be searchable in Primo VE. The title you enter here should be the name of the collection and will appear in search results.

General Information section

- Enter the name for the collection. It must be unique among top level collections.
- You must select the library for the collection.
- The thumbnail is optional here. Thumbnails can be up to 100k. The thumbnail will show in discovery as a tile for the collection, and it will appear as a pane across the top of the screen:



- **Forms** – this section is used for creating digital representations.

After filling in the information on this screen you can click “Save and Continue” to add material to the collection, or you can click “Save” which will save and close the collection.

Part 2: Adding records to the collection

Records can be added to the collection one at a time, or as a set.

Click on the tab “Title List.”

To add a single title, click +Add Title:

A screenshot of a web application interface titled "Collection Resource Editor". At the top right are buttons for "Download EAD", "Cancel", and "Save". Below the title is the collection name "National Book Award Winners". There are five tabs: "General", "Sub-collections (0)", "Title List" (which is highlighted with a red box), "Discovery", and "History". Below the tabs is a search bar with a "Publisher" dropdown, a text input field, and a search icon. To the right of the search bar are two buttons: "+ Add Title" (highlighted with a red box) and "+ Add Titles from Set". Below the search area is a large grey box with a list icon and the text "No records were found."

This opens a search screen where you can search for a title. Select the title and click the Select button to add it to the collection. A confirmation box appears, click Confirm.

The screenshot shows a search results page with a purple header. The search query is "the journey of little charlie". A "Select" button is highlighted in the top right. Below the search bar, there are sorting options: "Sort by: Rank" and "Secondary sort by: Rank". A table lists search results, with the first row selected and highlighted in yellow. The selected row is for "The journey of little Charlie / Christopher Paul Curtis." and includes details such as "Book (Book - Physical) text; unmediated; volume", "Language English", "Creation Date 07/15/2020 09:18:37 AM, CDT", "ISBN 9780545156660 and others", and "Record Number (NdBC)008250081ODN01-Aleph and others".

Select the title you want to add and click the button (at the bottom) “Add Titles” and confirm. The title is added.

The screenshot shows the "National Book Award Winners" collection page. The "Title List" tab is active. The page displays a table with columns for "MMS ID", "Title", and "Material Type". The first row shows "990082500810206067" for the title "The journey of little Charlie /" with a material type of "Book". There are buttons for "Add Title", "Add Titles from Set", "Move Selected", "Remove Selected", and "Remove All".

To add a set of titles, click +Add Titles from Set:

The screenshot shows the "Collection Resource Editor" page for "National Book Award Winners". The "Title List" tab is active. The page displays a table with columns for "MMS ID", "Title", and "Material Type". The first row shows "990082500810206067" for the title "The journey of little Charlie /" with a material type of "Book". There are buttons for "Add Title", "Add Titles from Set", "Move Selected", "Remove Selected", and "Remove All". The "Add Titles from Set" button is highlighted with a red box.

The manage sets screen appears where you can select a set of titles.

The screenshot shows the "Manage Sets" page. The "All Sets" tab is active. The page displays a table with columns for "Name", "Type", "Content Type", "Content Origin", and "Creation Date". The first row shows "national book award" with a type of "Itemized", content type of "All Titles", content origin of "Institution only", and creation date of "03/03/2026 04:33:52 PM, CST". There are buttons for "Back" and "Add Set Titles". The "Add Set Titles" button is highlighted with a red box.

Click “Add Set Titles” button and confirm. A job starts that adds the titles to the collection. You are returned to the collection screen. Click Save.

It may take a few minutes for the books to appear. To refresh the list, you can click on a different tab and then back to the Title List tab.

Part 3: Appearance in Primo VE

On the Discovery tab you can change the default sort order of the records in your collection.

This is also where you can upload more thumbnails. The system will display up to four images in the collection's tile. The first image is used as the collection's banner image. These images will override the image uploaded in Part 1.

The screenshot shows the 'Collection Resource Editor' interface for a collection titled 'National Book Award Winners'. The 'Discovery' tab is selected. In the 'Display' section, the 'Sort titles by' dropdown is set to 'Date - newest'. In the 'Manage Discovery Thumbnails' section, there is an 'Upload' button and a table of thumbnails. The table has columns for a grid icon, a checkbox, a thumbnail image, and a 'Creation Date' column. Four thumbnails are listed, each with a corresponding book cover image.

			Creation Date	
⋮	1. <input type="checkbox"/>		2026-03-05 15:02:22	⋮
⋮	2. <input type="checkbox"/>		2026-03-05 15:02:37	⋮
⋮	3. <input type="checkbox"/>		2026-03-05 15:02:50	⋮
⋮	4. <input type="checkbox"/>		2026-03-05 15:03:02	⋮

The first four images map to the tile like this:



The collection tile now is a composite of the four book covers.



Part 4: Creating a Collection Based on a Logical Set

Sometimes it would be nice to have a collection that automatically updates itself, and that is where logical sets come in. In Alma, you can create a collection based on the contents of a logical set.

An example of this would be a new materials collection. The query for the set could be, MMS Creation Date (Title) Is Within the Last (days) "100"

The screenshot shows a search interface with a dropdown menu set to "Physical titles". Below the dropdown is a query builder with three main components: a dropdown menu for "Title: MMS Creation Date (Title)", a dropdown menu for "Is Within the Last (days)", and a text input field containing "100". There are plus and minus icons to the left of the first dropdown, and plus and minus icons to the right of the text input field. At the bottom right of the interface are "Clear form" and "Search" buttons.

As titles age beyond 100 days they are automatically removed from the logical set and the collection.

Configurations for Logical collections

there are two things you need to set up before you can create a collection based on a logical set.

1. Create an empty default collection.
Go to the Resource menu and select Manage Collections.
Click Add Top-Level Collection, give the collection a title, name, and check suppress from Discovery.

Add New Collection Save and continue Cancel Save

Top Level Collection

Bibliographic Record Information

Record Format: MARC21 Bibliographic

Title: Default Collection

Suppress from Discovery:

General Information

Name: Default Collection

Description: Keep this collection. It is required for the configuration for Logical Collections.

Library: Bismarck State Colleg

External System:

External ID:

Logical Collection:

Thumbnail Upload:

Place at/before: Bottom

- Next, click on the Configuration menu, then Resources. Under the General column, find and select Resource Management Jobs Configuration. In the section Synchronize All Logical Collections Job, change the status to Active. In the Default Collection search box find the default collection you just created in step 1 and click Save.

Resource Management Jobs Configuration Back Save

Delete Draft Deposits Job

Status: Active Inactive

Number of days: 14

Scheduler: Not scheduled

Run Now

Deposit Activity Report Job

Status: Active Inactive

Scheduler: Not scheduled

Run Now

Synchronize All Logical Collections Job

Status: Active Inactive

Default Collection * Default Collection

Scheduler: Every day at 03:00

- Navigate back to the Manage Collections page. Click Add Top-Level Collection. Everything about setting up a logical collection is the same except you need to click the check box Logical Collection.

Add New Collection Save and continue Cancel Save

Top Level Collection

Bibliographic Record Information

Record Format: MARC21 Bibliographic

Title: North Dakota

Suppress from Discovery:

General Information

Name: North Dakota

Description:

Library: Bismarck State Co

External System:

External ID:

Logical Collection:

Thumbnail Upload:

Place at/before: Bottom

