Polaris Vega: Creating a New Materials Showcase based on item data

Environment

Polaris Libraries using Vega Discover

Description

New Materials at Libraries where Item Dates determine a 'New' status

Currently Vega Discover supports filtering for New Materials based on Bibliographic Record level fields. In Sierra this is the Cat Date field, and in Polaris we use the First Available Date field that is populated when the first item is created for a bib record.

In Consortia libraries, acquisitions workflows often dictate that new materials at each branch are based solely on individual item creation dates as books are ordered and received at different member libraries and then cataloged. If your library needs to use item creation dates to determine eligibility for new books lists the current New Materials filter in Vega Discover will not filter as expected for your member libraries because the New Material date is only associated with the FIRST item that was cataloged for that record. Some libraries may find that presenting New Materials from a larger date range in New Books List showcases may help. There is an open enhancement request in our Idea Exchange requesting an option to use item dates for New Materials that you should also add your support and comments to: https://ideas.iii.com/forums/951766-Vega-discover/suggestions/46810153-use-item-date-instead-of-bib-date-for-new-material

Workaround Options

In the meantime there are other item level metadata elements that can be used to help create new books lists for showcases in Vega Discover. For Polaris Libraries we suggest creating a Collection for New Materials and adding this Collection to your New Materials items as they are cataloged or in a batch job as a part of your cataloging process.

For further reading on how to create and use a new Collection within Polaris please refer to the documentation article titled "Working with Collections". Click here to view this article within the Polaris 7.4 documentation.

If choosing to bulk change item records into (and out of) the New Materials collection, please review the documentation called "Bulk-Changing Item Records" for the Staff Client. If using Leap, please see the documentation called "Bulk Change Item Records" within the Leap documentation. Click here to view the Staff Client documentation for 7.4, or click here to view the Leap documentation for Polaris 7.4.

Procedure

Creating a Saved Search to retrieve New Materials using a Collection

Once items have been given a Collection of New Materials, simple Saved Searches can be utilized across the Consortia for each Member Library to return the New Materials for their Branch.

1. To Build a New Materials Saved Search using the Collection Facet:
2. Search for * in your catalog to retrieve ALL MATERIALS
3. In the Refine Search panel in the Availability Facet choose At Library
4. In the Refine Search panel in the Collection Facet choose New Materials
5. In the Refine Search panel in the Location Facet choose the desired location(s)
6. Apply your filters
7. Save the Search as New Materials <Location>

NOTE: Keep in mind that you will need to add another step to your processes for batch removing books from the New Materials Collection based on your library policies so that they fall out of the New Materials list when expected.

Using the New Materials Saved Search to generate a Showcase

Once you have created a saved search for new materials at your branch library you will be able to create a Showcase and display that showcase on the Home Page or to generate code to display it on your library website. Since this New Materials showcase is based on a saved search, the materials within the showcase will update automatically as materials are added and removed from the Collection Facet and will always display the items that are currently a part of the filter.

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Taxonomy

- Solutions > Discovery

Collections

- Vega

Go to Original Solution