

Using Logical Title Level Collections

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Agenda

- Introduction
- Creating the Logical Query
- Creating the Logical Collection
- Attributing a Set to the Logical Collection
- Ongoing Update of the Collection From the Set
- The Logical Title Level Collection in Discovery

Introduction

Introduction

- When a title level collection is **not** defined as “logical” titles can be added to the title level collection in the following ways:
 - Manually one at a time from the “Title List” tab of the collection by clicking “Add Title”
 - Manually from a set from the “Title List” tab of the collection by clicking “Add Titles from Set”
 - Via an Import Profile of type “Digital” by choosing the title level collection in the “Inventory Information” tab

Introduction

- When a title level collection **is** defined as “logical” titles are assigned to collections **automatically**.
- The assignment of titles to a title level collection is based on a logical query instead of assigning them manually. This is a significant timesaver.
- This is done by defining the Title Level Collection to be logical.
- The title level collection is considered a “Logical Collection” when the new “Logical Collection” checkbox is checked on the “Add New Collection page”.
- This is accessed when creating a new title level collection at “Resources > Manage Inventory > Manage Collections”.

Introduction

- Any time a new title is added to or removed from the logical set it will also get added to or removed from the Logical Title Level Collection.
- This eliminates the need to manually add a title or manually click “Add Titles from Set”
- Note that it is possible to add records with any type of inventory (or no inventory) to title level collections.
- See also the online help [Adding a Logical Collection](#) on the Ex Libris Knowledge Center.

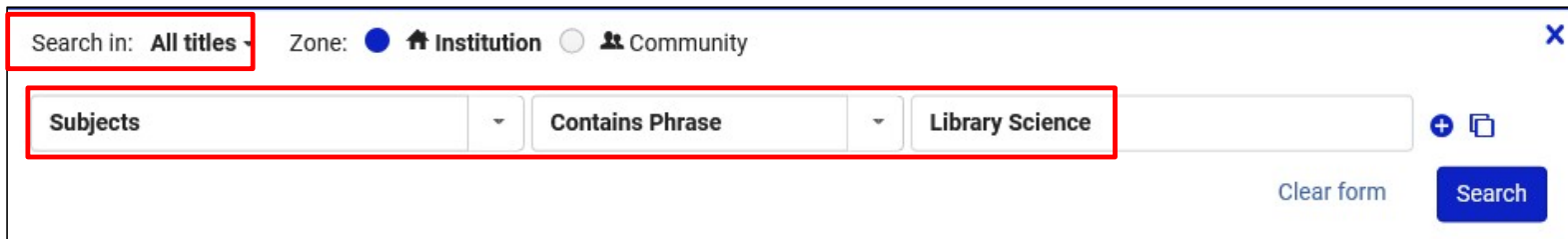
Creating the Logical Query

Creating the Logical Query

- The logical query is determined by the query of a titles set (Digital Titles, Electronic Titles, Physical Titles or All Titles).
- In our example here we will use a logical set of type "All Titles".
- First, we will create a set of all titles where "Subject contains phrase Library Science".
- Then we will attribute the logical set to a Logical Title Level Collection.

Creating the Logical Query

- Here we are searching for all titles where (Subjects contains phrase "Library Science")



The screenshot shows a search interface with the following elements:


- Search in:** A dropdown menu set to "All titles".
- Zone:** Radio buttons for "Institution" (selected) and "Community".
- Query Builder:** A sequence of three dropdown menus: "Subjects", "Contains Phrase", and "Library Science".
- Buttons:** "Clear form" and "Search".
- Icons:** A plus sign and a document icon next to the query input field.

Creating the Logical Query

- From the results we will click "Save Filter and Query" to create a logical set

All Titles (1 - 50 of 891) where (Subjects contains phrase "Library Science") Push Selected to MDE **Save and Filter Query**

Select All Sort by: Title - Asc Secondary Sort by: Rank 0 rows selected Expand

1  **027.7 : Zeitschrift für Bibliothekskultur.** Edit Record Portfolio List

Journal (Journal - Electronic) text; computer; online resource By Universitätsbibliothek Basel, (Basel, Switzerland : Universitätsbibliothek Basel 2013)

Language: German **MMS ID:** 99110800800121

Creation Date: 17/08/2013 19:09

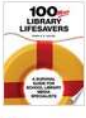
Open Access

ISSN: 2296-0597

Record number: (OCoLC)891466631

Modification Date: 31/10/2021 12:28

Physical **Electronic (3)** Digital Other details

2  **100 more library lifesavers [electronic resource] : a survival guide for school library media specialists / Pamela S. Bacon.** Edit Record Portfolio List

Book (Book - Electronic) text; computer; online resource By Bacon, Pamela S., (Westport, Conn. : Libraries Unlimited, 2003.)

Medium Type: electronic resource **MMS ID:** 991765650000121

Language: English

Creation Date: 11/09/2011 11:51

ISBN: 1-4294-7304-5 and others

Record number: (CKB)1000000000473916

Modification Date: 31/10/2021 11:31

Physical **Electronic (1)** Digital Other details

Creating the Logical Query

- We will call our All Titles Logical Set “All titles with subject Library Science”

< Set Details Save and Filter Cancel Save

General Information

Set name * All titles with subject Library Science

Description

Note

Set content type * All Titles

Private No Yes

Creation date 09/04/2024 07:50

Updated by Ex Libris

Set ID -

Set type Logical

Status Active Inactive

Created by Ex Libris

Content Origin Institution only Discovery

Creating the Logical Query

- The set has been created

The screenshot displays the 'Manage Sets' interface. At the top, there are buttons for 'Create Itemized Set' and 'Create Logical Set'. Below these are search and filter options, including a search bar, 'Sort by: Creation Date', 'Scope: My Sets', and 'Status: All'. A table lists the sets, with the first set highlighted by a red box:

Set ID	Set Name	Logical Query	Status	Details
1	All titles with subject Library Science	Logical	Active	All Titles Institution only Created by Alicia Chen Created on 08/04/2024 13:23

Creating the Logical Collection

Creating the Logical Collection

- The Logical Title Level Collection will be created like other title level collections at “Resources > Manage Inventory > Manage Collections”

Manage Inventory

Manage Collections

Community Zone Updates Task List

Manage Electronic Resource Activation

My Electronic Resources by Provider




Shelf Report

Creating the Logical Collection

- We will add a new top-level collection

< Top Level Collections Cancel

1 - 35 of 35 Sort By 0 rows selected + Add Top-Level Collection Move Selected Reorder Selected

			MMS ID	Collection ID	Collection Name	Description	Creation Date		
⋮	1	<input type="checkbox"/>		99111411300121	8131549960000121	Feminist Studies	A compilation of resources and images pertaining to Feminist Studies and related disciplines	04/04/2017 17:42	⋮
⋮	2	<input type="checkbox"/>		99256211300121	8155270000000121	Flowers of Israel	Includes a variety of resources on flowers in Israel including photographs donated by Peter and Pamela Perach on behalf of the Perach Flower Foundation	07/04/2020 17:43	⋮
⋮	3	<input type="checkbox"/>		99504787700121	8184350310000121	Digital objects about Taiwan	-	13/09/2023 05:25	⋮

Creating the Logical Collection

- On the next slide we are adding a new Top-Level Collection called “Resources about Library Science”.
- We are checking the checkbox “Logical Collection” to designate this as a Logical Collection”.

Creating the Logical Collection

Add New Collection Save and continue Cancel Save

Top Level Collection

Bibliographic Record Information

Record Format: MARC21 Bibliographic

Title * **Resources about Library Science**

Suppress from Discovery

General Information

Name * **Resources about Library Science**

Description

Library * **Library and Information Sc** Logical Collection

External System

External ID

Thumbnail Upload

Place at/before: **Top**

card catalog.png (59.64 KB)

card catalog.png





Designate this title level collection as a logical collection

Creating the Logical Collection

- Here is our new Logical Title Level Collection

Top Level Collections Cancel

1 - 36 of 36 Sort By 0 rows selected

			MMS ID	Collection ID	Collection Name	Description	Creation Date	
1	<input type="checkbox"/>		99521187800121	8187110340000121	Resources about Library Science	-	08/04/2024 14:07	<input type="button" value="..."/>
2	<input type="checkbox"/>		99111411300121	8131549960000121	Feminist Studies	A compilation of resources and images pertaining to Feminist Studies and related disciplines	04/04/2017 17:42	<input type="button" value="..."/>
3	<input type="checkbox"/>		99256211300121	8155270000000121	Flowers of Israel	Includes a variety of resources on flowers in Israel including photographs donated by Peter and Pamela Perach on behalf of the Perach Flower Foundation	07/04/2020 17:43	<input type="button" value="..."/>
4	<input type="checkbox"/>		99504787700121	8184350310000121	Digital objects about Taiwan	-	13/09/2023 05:25	<input type="button" value="..."/>

Attributing a Set to the Logical Collection

Attributing a Set to the Logical Collection

- From the "Titles List" tab we click "Assign Titles Set" to attribute the set we made called "All titles with subject Library Science" to this Logical Title Level Collection.

The screenshot shows the 'Collection Resource Editor' interface. At the top, there is a navigation bar with a back arrow, the title 'Collection Resource Editor', and three buttons: 'Download EAD', 'Cancel', and 'Save'. Below this is a section titled 'Resources about Library Science' with a sub-collection count of '(0)'. There are five tabs: 'General', 'Sub-collections (0)', 'Title List' (highlighted with a red box), 'Discovery', and 'History'. The main content area displays the 'Set Name: Digital titles with title or subject Taiwan' and the 'Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")'. On the left, there is a search bar with a 'Publisher' dropdown and a search icon. On the right, there are three buttons: 'Update Collection From Set', '+ Assign Titles Set' (highlighted with a red box), and '- Remove Titles Set'. At the bottom, there is a message 'No records were found.' with a list icon above it.

Attributing a Set to the Logical Collection

- Now we will choose the desired set

Manage Sets Back Add Set Titles

My Sets Public Sets All Sets

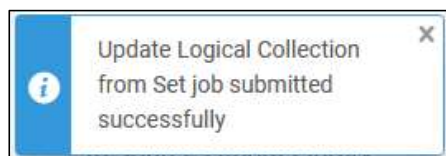
1 - 50 of 86 Set name

Content Type : All Content Origin : All

	Name	Type	Content Type	Content Origin	Created by	Creation Date	
1	<input checked="" type="radio"/> All titles with subject Library Science	Logical	All Titles	Institution only	AliciaC613 <input type="button" value="Avatar"/>	08/04/2024 13:23	<input type="button" value="More"/>

Attributing a Set to the Logical Collection

- A job runs to add the titles from the logical set to the Logical Title Level Collection



Monitor Jobs

Scheduled Running History

1 - 100 of 162 Job ID

Refresh

Job Category : All Status : All Submit Date Range 07/04/2024 - 08/04/2024

◆ Name	◆ Process ID	◆ Job Category	◆ Start Date	◆ End Date	◆ Status	Records processed	Records with exceptions	
1 Add set 7703379690000121 to collection: 8187110340000121	7703422290000121	Repository	08/04/2024 14:23	08/04/2024 14:23	✔ Completed Successfully	891	0	<input type="button" value="⋮"/>

Ongoing Update of the Collection From the Set

Ongoing Update of the Collection From the Set

- As titles get added or removed from the logical set they also get added or removed from the Logical Title Level Collection (this is the significant time saver of this feature).
- The synchronization of the titles from the logical set to the Logical Title Level Collection is done in one of two ways:
 - When the nightly job "Synchronize All Logical Collections Job" runs
 - When the staff user clicks "Update Collection From Set"

Ongoing Update of the Collection From the Set

- The staff user can click "Update Collection From Set" if he or she does not want to wait for the scheduled job "Synchronize All Logical Collections Job" to run

Collection Resource Editor Download EAD Cancel Save

Resources about Library Science

General Sub-collections (0) **Title List** Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 50 of 891

	MMS ID	Title	Material Type	
1	9944508300121	EContent quarterly.	Journal	⋮
2	9944510800121	101 uses of dBase in libraries /	Book	⋮
3	9944968500121	Studies in library and information science in the 21st century	Book	⋮

Ongoing Update of the Collection From the Set

- For the job "Synchronize All Logical Collections Job" to be scheduled to run at the institution the staff user needs to do as follows (just once):
 - Access "Resource Management Jobs Configuration" at "Configuration > Resources > Other"
 - In the "Synchronize All Logical Collections Job" change the status to "Active"

Screenshot of the "Synchronize All Logical Collections Job" configuration interface. The job title "Synchronize All Logical Collections Job" is highlighted with a red box. Below it, the "Status" section shows "Active" selected with a blue radio button, also highlighted with a red box. The "Default Collection" is set to "Miscellaneous Digital Items". The "Scheduler" is set to "Every day at 04:00".

On the next slide we will discuss the "Default Collection"

Ongoing Update of the Collection From the Set

- The “Default Collection” is the Title Level Collection to which the records from Logical Title Level Collection will be assigned if the designated Logical Title Level Collection will be deleted.
- For example, in our case if the Logical Title Level Collection “Resources about Library Science” were deleted, then all titles that were in the set would be assigned to Title Level Collection “Miscellaneous Digital Items”

Screenshot of a software interface showing a configuration for a "Synchronize All Logical Collections Job". The interface includes a status section with "Active" selected and "Inactive" unselected. A red box highlights the "Default Collection" dropdown menu, which is currently set to "Miscellaneous Digital Items". To the right of the dropdown are icons for "Close" (X) and "Menu" (three horizontal lines). Further right is an information icon (i). The "Scheduler" is set to "Every day at 04:00".

Ongoing Update of the Collection From the Set

- Let's see what happens when a new title is added to the logical set "Resources about Library Science".

Collection Resource Editor Download EAD Cancel Save

Resources about Library Science

General Sub-collections (0) Title List Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 50 of 891

[Update Collection From Set](#) [+ Assign Titles Set](#) [- Remove Titles Set](#)

	MMS ID	Title	Material Type	
1	9944508300121	EContent quarterly.	Journal	...
2	9944510800121	101 uses of dBase in libraries /	Book	...
3	9944968500121	Studies in library and information science in the 21st century	Book	...

Currently there are 891 titles from the set in the Logical Title level Collection

Ongoing Update of the Collection From the Set

- On the next slide we add a new record with title "Glossary of library and information science : English-Chinese, Chinese-English / Su Chen, Shi Deng."
- This title has subject "Library Science".
- It should therefore get added to the logical set "All titles with subject Library Science" and then subsequently to the Logical Title level Collection "Resources about Library Science"

Ongoing Update of the Collection From the Set

LDR	00909cam#a2200253Mi#4500
001	ocn749587561
005	20240408084856.0
008	060403s2006####gw#####d####000#0#eng#d
020	\$\$a 3598116896
020	\$\$a 9783598116896
035	\$\$a (OCoLC)749587561
035	\$\$a (OCoLC)ocn749587561
041 0	\$\$a eng \$\$a chi
050 0	\$\$a Z1006 \$\$b .G56 2006
082 0 4	\$\$a 020.3 \$\$q OCoLC \$\$2 22/eng/20230216
100 1	\$\$a Su, Chen.
245 1 0	\$\$a Glossary of library and information science : \$\$b English-Chinese, Chinese-English / \$\$c Su Chen, Shi Deng.
260	\$\$a München : \$\$b K. G. Saur, \$\$c 2006.
300	\$\$a XXI, 343 s. ; \$\$c 21 cm.
 650 0	\$\$a Library science.
700 1	\$\$a Shi, Deng.
758	\$\$a Glossary of library and information science (Text) \$\$1 https://id.oclc.org/worldcat/entity/E39PCFTGm8RhY7t7qcH7d3HyFq \$\$4 https://id.oclc.org/worldcat/ontology/hasWork

Ongoing Update of the Collection From the Set

- In order for the new record to get added to the logical collection one of two events needs to happen:
 - The scheduled job “Synchronize All Logical Collections Job” runs
 - The staff user clicks “Update Collection From Set” rom the Titles List of the Logical Title level Collection

The scheduled job “Synchronize All Logical Collections Job” has run

1 - 4 of 4 Name ▾ Synchronize All Logical Coll Q Refresh 📄 ⚙️

Job Category : All ▾ Status : All ▾ Submit Date Range 07/04/2024 - 08/04/2024 X 📅

◆ Name	◆ Process ID	◆ Job Category	◆ Start Date	◆ End Date	◆ Status	Records processed	Records with exceptions	
1 Synchronize All Logical Collections Job	7703445550000121	Repository	08/04/2024 14:58	08/04/2024 14:58	✔ Completed Successfully	0	-	⋮

Ongoing Update of the Collection From the Set

- The title was added. Now there are 892 titles in the Logical Title level Collection "Resources about Library Science". Previously there were 891 titles.

Collection Resource Editor Download EAD Cancel Save

Resources about Library Science

General Sub-collections (0) Title List Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 50 of 892 Publisher

[Update Collection From Set](#) [+ Assign Titles Set](#) [- Remove Titles Set](#)

	MMS ID	Title	Material Type	
1	9944508300121	EContent quarterly.	Journal	...
2	9944510800121	101 uses of dBase in libraries /	Book	...

Ongoing Update of the Collection From the Set

- Here is the new title that we added to the repository, it is in the Logical Title Level Collection:

Collection Resource Editor Download EAD Cancel Save

Resources about Library Science

General Sub-collections (0) **Title List** Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 1 of 1 Title ▾ **Glossary of library and infor**

[Update Collection From Set](#) [+ Assign Titles Set](#) [- Remove Titles Set](#) [Share](#) [Settings](#)

MMS ID	Title	Material Type
1 99521187500121	Glossary of library and information science : English-Chinese, Chinese-English /	Book

Ongoing Update of the Collection From the Set

- Again, we will add a new title to the repository which has subject “Library science”. It is title “图书馆管理学 = Library science/ 付立宏, 袁琳主编”

050	0	\$\$a Z678
084		\$\$a 022 \$\$2 ncsclt
097		\$\$a TUL \$\$d 022 \$\$e 6058-3 \$\$b C2H \$\$c 3275697 \$\$f kkw,SJC
245	0 0	\$\$a 图书馆管理学 = \$\$b Library science/ \$\$c 付立宏, 袁琳主编
246	1 1	\$\$a Library science.
250		\$\$a 第1版
260		\$\$a [武汉市] : \$\$b 武漢大學出版社, \$\$c 2010.
300		\$\$a 401面 : \$\$b 圖 ; \$\$c 24公分
490	0	\$\$a 高等学校图书馆学专业系列教材
504		\$\$a 含參考書目
 650	7	\$\$a 圖書館 \$\$2 lcstt
 650	0	\$\$a Library science.
700	1	\$\$a 付, 立宏

Ongoing Update of the Collection From the Set

- Now, instead of waiting for the scheduled job "Synchronize All Logical Collections Job" to run, we will click "Update Collection From Set" from the "Title List" tab of the Logical Title Level Collection.

Collection Resource Editor Download EAD Cancel Save

Resources about Library Science

General Sub-collections (0) **Title List** Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 50 of 892 Update Collection From Set + Assign Titles Set - Remove Titles Set

MMS ID	Title	Material Type	
1	9944508300121	EContent quarterly.	Journal
2	9944510800121	101 uses of dBase in libraries /	Book

Note that now there are 892 titles in the Logical Title Level Collection

Ongoing Update of the Collection From the Set

- A job is sent and completes. The job updates the Logical Title Level Collection.

Monitor Jobs Cancel

Scheduled Running History

1 - 100 of 175 Job ID Refresh

Job Category: All Status: All Submit Date Range 07/04/2024 - 08/04/2024

Name	Process ID	Job Category	Start Date	End Date	Status	Records processed	Records with exceptions	
1 Re-index MMS IDs removed and assigned to logical collection ID 8187110340000121	7703466710000121	Repository	08/04/2024 18:35	08/04/2024 18:35	Completed Successfully	1	0	...

Ongoing Update of the Collection From the Set

- The title was added. Now there are 893 titles in the Logical Title level Collection "Resources about Library Science". Previously there were 892 titles.

Collection Resource Editor Download EAD Cancel Save

Resources about Library Science

General Sub-collections (0) **Title List** Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 50 of 893 Publisher

Update Collection From Set + Assign Titles Set - Remove Titles Set

	MMS ID	Title	Material Type	
1	9944508300121	EContent quarterly.	Journal	...
2	9944510800121	101 uses of dBase in libraries /	Book	...

Ongoing Update of the Collection From the Set

- Here is the new title that we added to the repository, it is in the Logical Title Level Collection:

Resources about Library Science

General Sub-collections (0) **Title List** Discovery History

Set Name: All titles with subject Library Science

Set Type: Logical where (Subjects contains phrase "Library Science")

1 - 1 of 1 Title 图书馆管理学

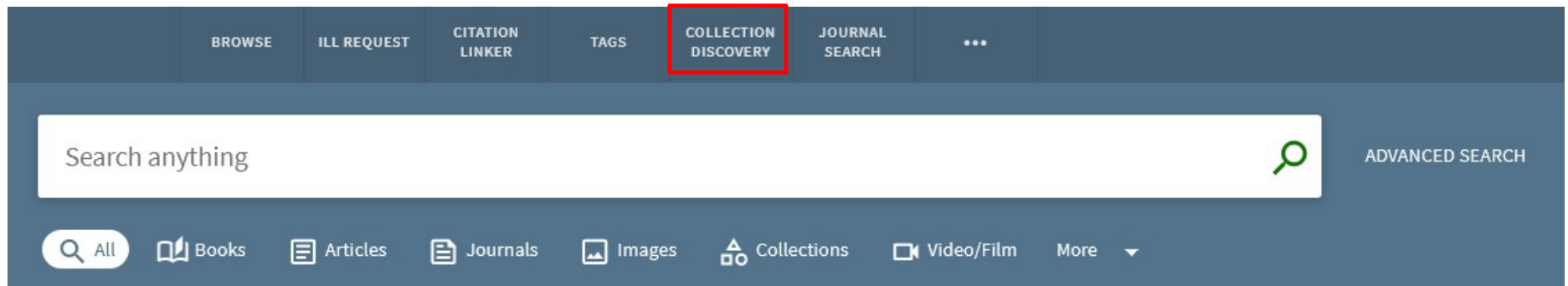
Update Collection From Set + Assign Titles Set - Remove Titles Set

MMS ID	Title	Material Type
1 99521187400121	图书馆管理学 = Library science/	Book

The Logical Title Level Collection in Discovery

The Logical Title Level Collection in Discovery

- In Primo VE we will access "Collection Discovery"



The Logical Title Level Collection in Discovery

- We see the title level collections

Here is our Logical Title Level Collection. We will click it.

Collections (28)

The screenshot displays a grid of 28 collection thumbnails. Each thumbnail includes a 'COLLECTION' label and a title. The collections shown are:

- Resources about Library Science (indicated by a red arrow)
- Feminist Studies
- Flowers of Israel
- Digital objects about Taiwan
- Oxford Exam Papers
- Library and Information Science Scholarly Articles
- All titles created in 2024
- Ex Libris Employees from around the world
- Harvard theses and dissertations

The Logical Title Level Collection in Discovery

- Now we have the contents of the collection

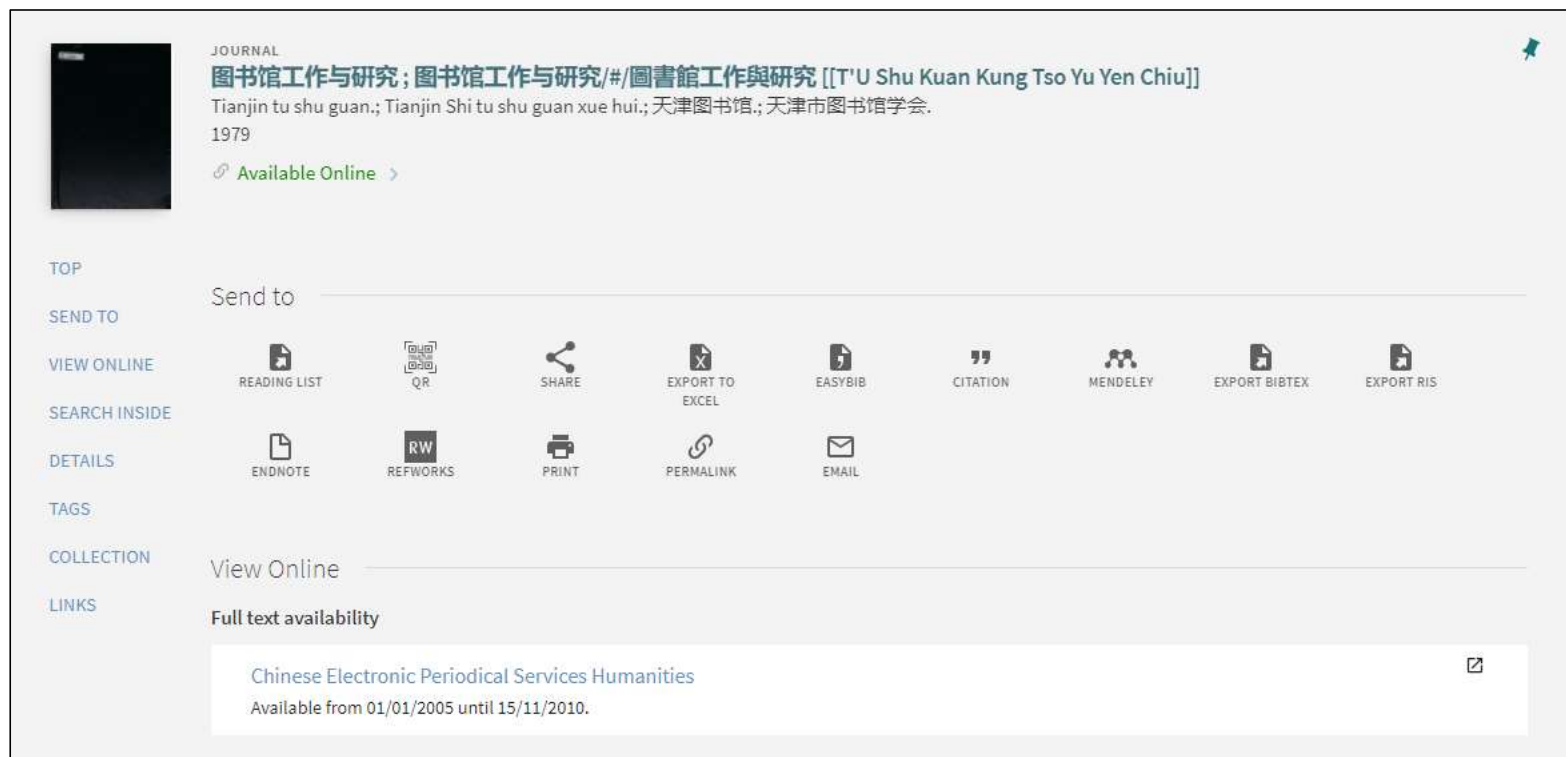
We will click this resource

Items (811) View [grid icon] [list icon]

 JOURNAL Library student journal.	 JOURNAL RQ.	 JOURNAL Library philosophy and practice.	 JOURNAL Libraries & culture (Online)	 JOURNAL Pakistan journal of library & information science : PJLIS.
 BOOK The librarian's guide to negotiation : winning strategies for the digital age	 JOURNAL Wilson library bulletin.	 JOURNAL 教育资料与图书馆学/#/教育资料與圖書館學 [[Chiao Yu Tzu Liao Yu T'U Shu Kuan Hsueh]]	 JOURNAL 图书馆工作与研究/#/圖書館工作與研究 [[T'U Shu Kuan Kung Tso Yu Yen Chiu]]	 JOURNAL 图书资讯学研究/#/圖書資訊學研究 [[T'U Shu Tzu Hsun Hsueh Yen Chiu]]

The Logical Title Level Collection in Discovery

- And now we have the details of the resource and can access it



The screenshot shows a journal record in a library discovery system. On the left is a vertical navigation menu with the following items: TOP, SEND TO, VIEW ONLINE, SEARCH INSIDE, DETAILS, TAGS, COLLECTION, and LINKS. The main content area is titled "JOURNAL" and features a black book cover icon. The title is "图书馆工作与研究; 图书馆工作与研究/;/圖書館工作與研究 [[T'U Shu Kuan Kung Tso Yu Yen Chiu]]". Below the title, it lists "Tianjin tu shu guan.; Tianjin Shi tu shu guan xue hui.; 天津图书馆.; 天津市图书馆学会." and the year "1979". A green link "Available Online >" is present. Below this is a "Send to" section with a grid of icons for: READING LIST, QR, SHARE, EXPORT TO EXCEL, EASYBIB, CITATION, MENDELEY, EXPORT BIBTEX, EXPORT RIS, ENDNOTE, REWORKS, PRINT, PERMALINK, and EMAIL. Underneath is a "View Online" section with the heading "Full text availability" and a white box containing the text "Chinese Electronic Periodical Services Humanities" and "Available from 01/01/2005 until 15/11/2010." with a small icon on the right.

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