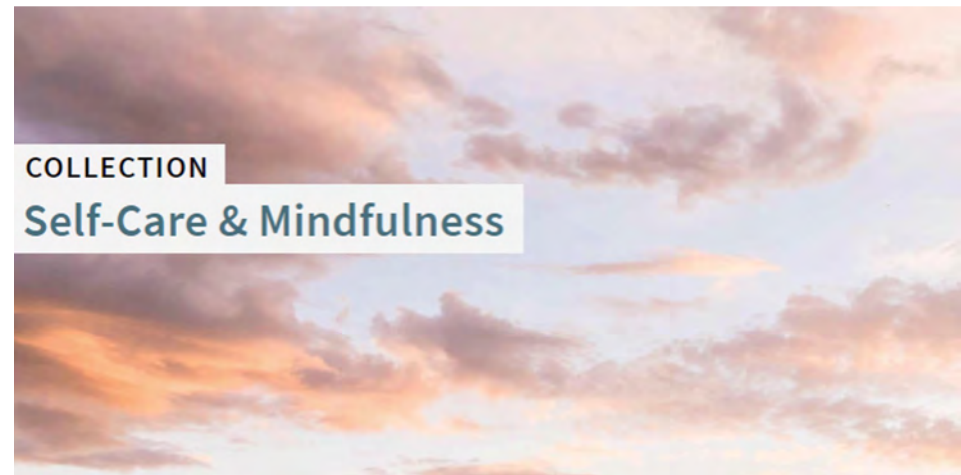# Discovering Collection Discovery

Laura Spradlin, Illinois Wesleyan University
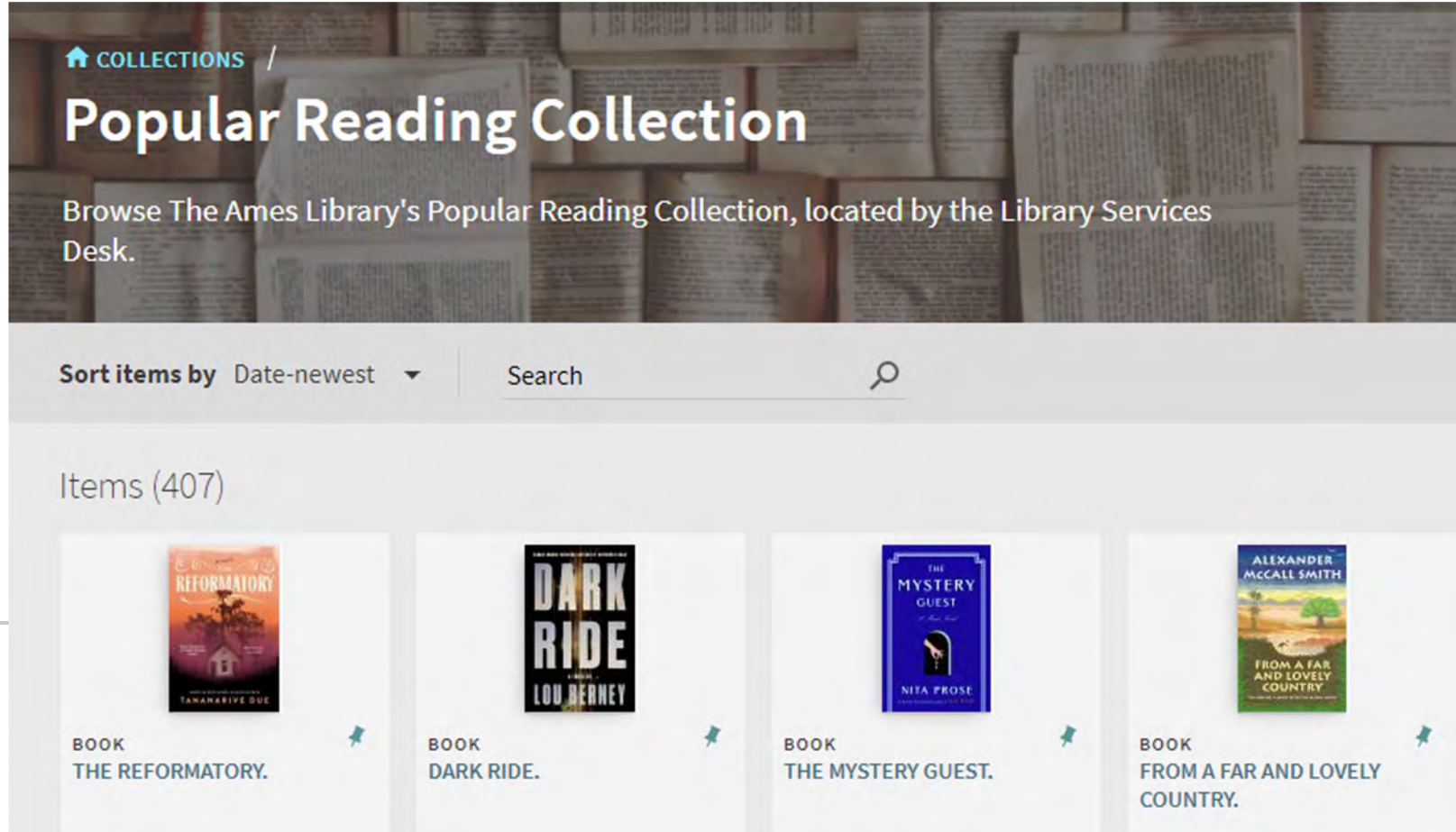
December 12, 2023

How & why we use Collection Discovery

- Highlight physical collections

- Easy to share links and QR codes

- Accompany displays

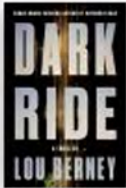# Collections Based on: **Physical Location**

COLLECTIONS /

Popular Reading Collection

Browse The Ames Library's Popular Reading Collection, located by the Library Services Desk.

Sort items by Date-newest ▼   Search

Items (407)

BOOK
THE REFORMATORY.

BOOK
DARK RIDE.

BOOK
THE MYSTERY GUEST.

BOOK
FROM A FAR AND LOVELY COUNTRY.

Collections Based on: **Physical Location**

Advanced Search

- Search in: Physical Titles > Zone: Institution

- Holdings: Permanent Physical Location > Equals > [Select location]

- AND Title: Tag Suppressed (Title) > Equals > No

Collections Based on: **Physical Location**

Save & Filter Query to create set

Physical Titles (1 - 20 of 407)

where (Permanent physical location equals ((Ames Library : Popular Reading Collection)) AND Tag Suppressed (Title) equals "No")

Save and Filter Query

Push Selected to MDE

🏠 Institution   🔗 Network   👥 Community

☐ Select All   Sort by : **Rank** ▾   Secondary Sort by : **Rank** ▾   **0 rows selected**   Expand: **Collections** ▾ ⊗   🗗   ⚙

1 ☐   **THE LITTLE LIAR.**   ⋯   Edit Record   Holdings   ⋯

     Book By ALBOM, MITCH. (2023)   **Language:** English   **MMS ID:** 998146697805847

     Creation Date: 12/06/2023 07:28:00 CST   **ISBN:** 9780062406651
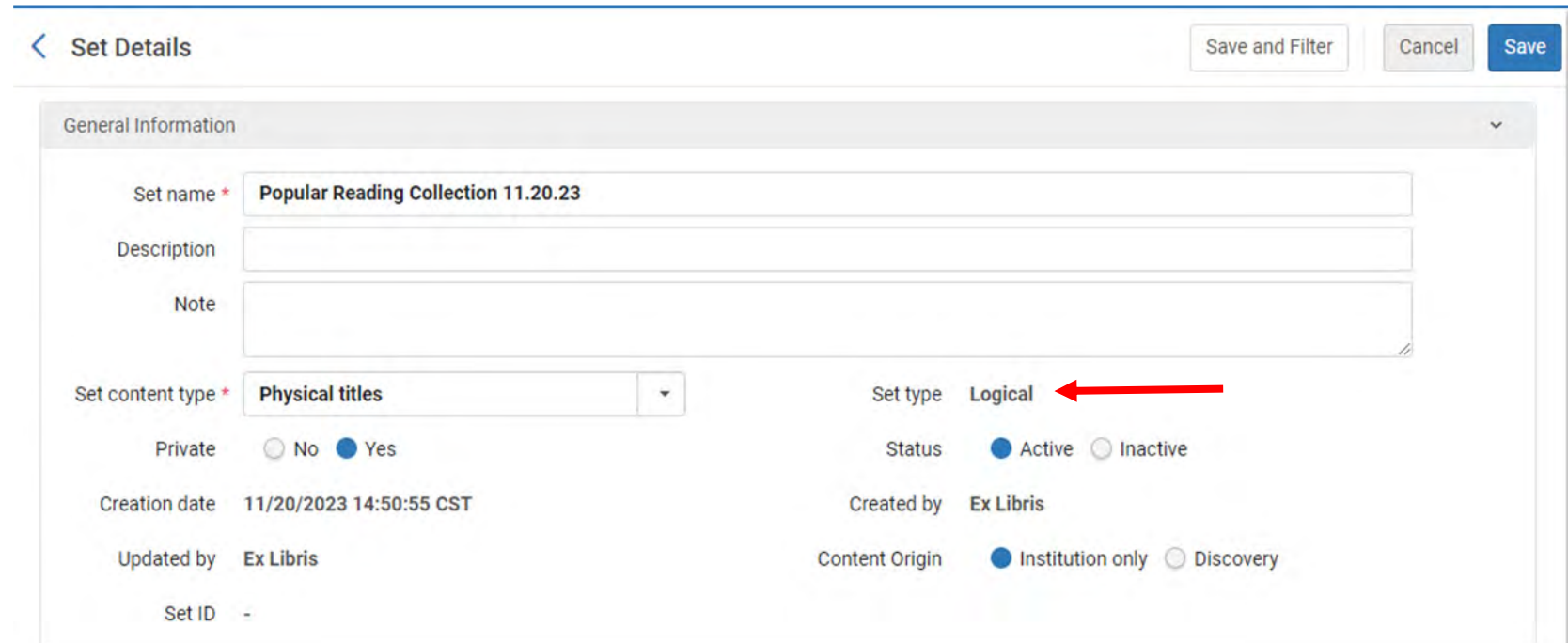
     Modification Date: 12/06/2023 07:28:00 CST

Collections Based on: **Physical Location**

Set Details

- Set name

- Description, notes

- Private: Yes or No

Click **Save**

Collections Based on: **Local Call Number**

Collections Based on: **Local Call Number**

Advanced Search

- Search in: Physical Titles > Institution

- Holdings: Permanent Call Number > Contains Phrase > [Local call number]

- AND Holdings: Permanent Call Number Type > Equals > Other scheme

Creating Collections from Sets

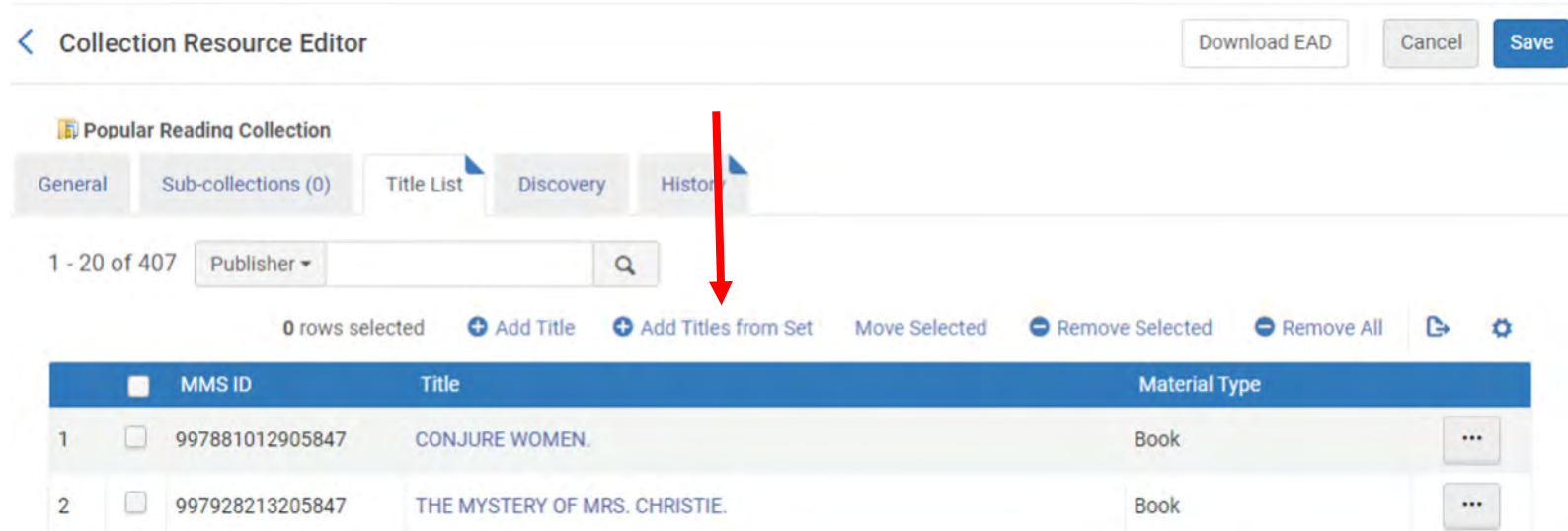**Resources > Manage Inventory > Manage Collections**

- Select existing collection or create new collection

Non-Logical Collection

- Title List tab >

  Add Titles from Set

- Don't forget to Save!

Logical Collections: Automatic Title Assignment

- New feature - Logical Collections: Uses logical sets for daily automatic title assignment
  - ExLibris YouTube: [Alma November 2023 Release: Logical Collections with Automatic Title Assignment](#)
  - ExLibris: [Managing Collections: Adding a Logical Collection](#)
  - ExLibris: [Configuring Resource Management Jobs](#)
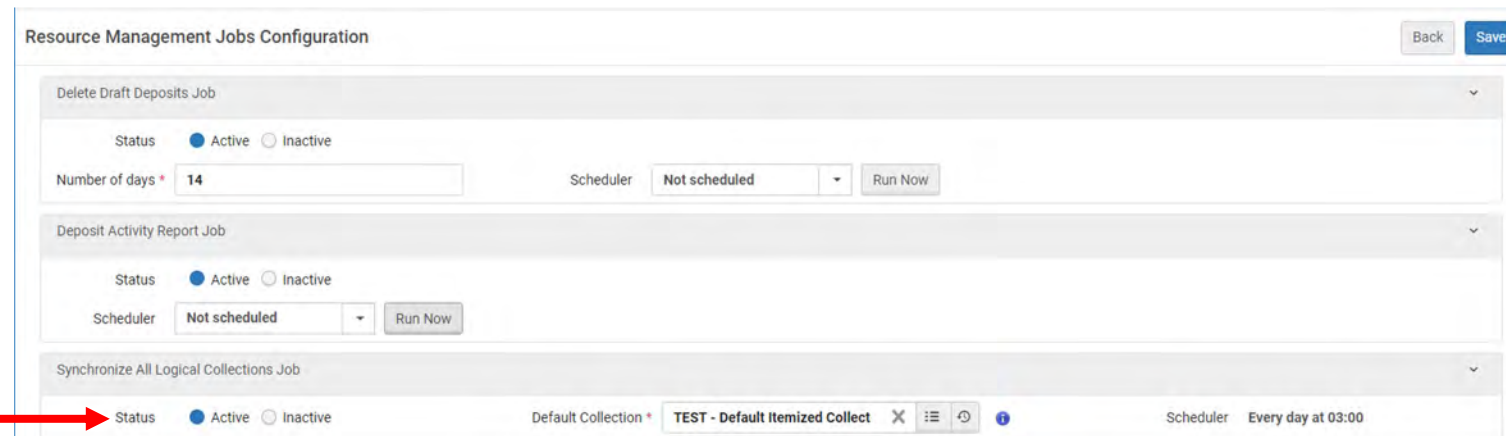- **Cannot edit an existing collection to become a logical collection**

Logical Collections: Automatic Title Assignment

Before creating a Logical Collection:

1. Must have collection titles in a logical set.

2. Create a <u>suppressed</u> empty non-logical collection. (This is a placeholder collection for digital titles that no longer meet the set criteria and are not part of any other collection.)

3. Configuration > Resources > General > Resource Management Jobs Configuration > Synchronize All Logical Collections Job

   ○ Status: Active

   ○ Default Collection:
   Search for newly created
   suppressed empty collection

Logical Collections: Automatic Title Assignment (demo)

Logical Collections: Automatic Title Assignment (demo)

Logical Collections: Automatic Title Assignment (demo)

Collection Resource Editor

Download EAD | Cancel | **Save**

📑 Logical Collection

Logical Collection
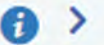
General | Sub-collections (0) | Title List | Discovery | History

Set Name: Popular Reading Collection 12.7.23

Set Type: Logical where (Library (Holdings) equals ((Ames Library : Popular Reading Collection)) AND Tag Suppressed (Title) equals "No")
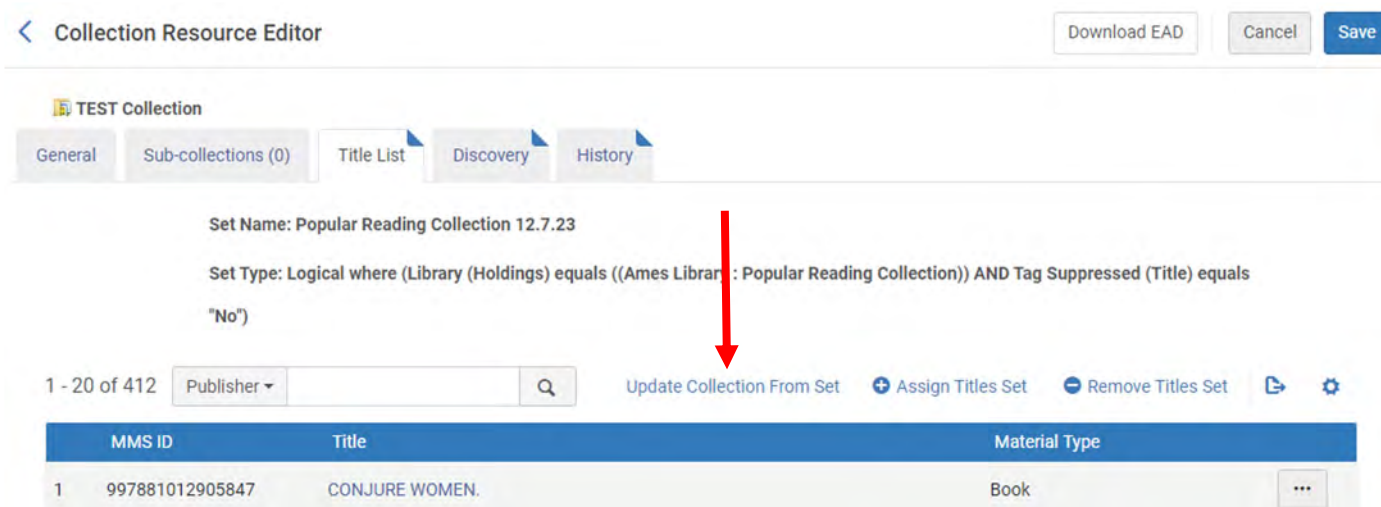
Publisher ▾ | [search box] | 🔍 → Update Collection From Set | ⊕ Assign Titles Set | ⊖ Remove Titles Set

No records were found.

Logical Collections: Automatic Title Assignment

- Updates daily via scheduled job

- Can update manually in Resources > Manage Inventory > Manage Collections > Edit Collection > Title List tab > Update Collection from Set

- Can adjust the set parameters once the Collection has been created
  - Admin > Manage Set > Content > [adjust parameters] > Save & Filter (overwrites set)
  - You will need to click "Update Collection from Set" to see title list changes reflected

Collections in Alma Search Results

You'll see Collection(s) as a facet in Alma as well as a tab on a record

Indexing Bug

Problem

- Changes made to collections in Alma not always reflected in Primo VE, even days later

- Happened when removing then adding all titles as well as adding/removing titles individually

Workaround

- Thanks to Michelle Eichelberger, SUNY Library Services, via Alma listserv

- Run the Recalculate Local Resources Types Job on set to re-index the records

- Check collection after about 15-30 minutes

Workaround:

If you used a set to populate the collection

1. Admin > Manage Jobs and Sets > Run a Job > **Recalculate Local Resource Types**

2. Select appropriate set, then run job.

Workaround:

If you added or removed titles manually

1. Resources > Manage Inventory > Manage Collections > **copy the Collection ID**

2. **Advanced Search** for Collection ID:
   -- All Titles
   -- Collection ID > Contains Keywords > [Paste collection ID]

3. **Save & Filter Query** to create a set of the results, then enter set details.

4. Admin > Manage Jobs and Sets > Run a Job > **Recalculate Local Resource Types**

5. Select appropriate set, then run job.

Maintaining Collections

- Colleague notifies me of additions or withdrawn items

- If only a few changes, add or remove manually

- Update by re-running set, removing all titles, then adding titles from set and running Recalculate Local Resources Types job

- If colleagues would like a Collection built, ask that they share titles or Primo VE links

- ExLibris: Primo Analytics > Customized Value Usage

WANT TO SEE CHANGES IN ALMA & PRIMO VE?

VOTE

All I-Share library employees can create an Ex Libris Idea Exchange account to submit and vote on ideas!

How to register:

1 Go to https://ideas.exlibrisgroup.com/

2 Select a forum to view (e.g., Alma, Primo, or another product)

3 In the upper right box, select "sign in" and then "create an account"

4 Verify your email & start voting!

Questions? Contact the CARLI Discovery Primo VE Commitee

We're glad you're here
Please sign in to leave feedback

- Facebook
- Google
- Ex Libris

Email address
Password
Forgot Password?
New here? Create an account

Consider voting for:

Alma collections: Allow to add from network zone

https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/44841430-alma-collections-allow-to-add-from-network-zone

Questions?

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