

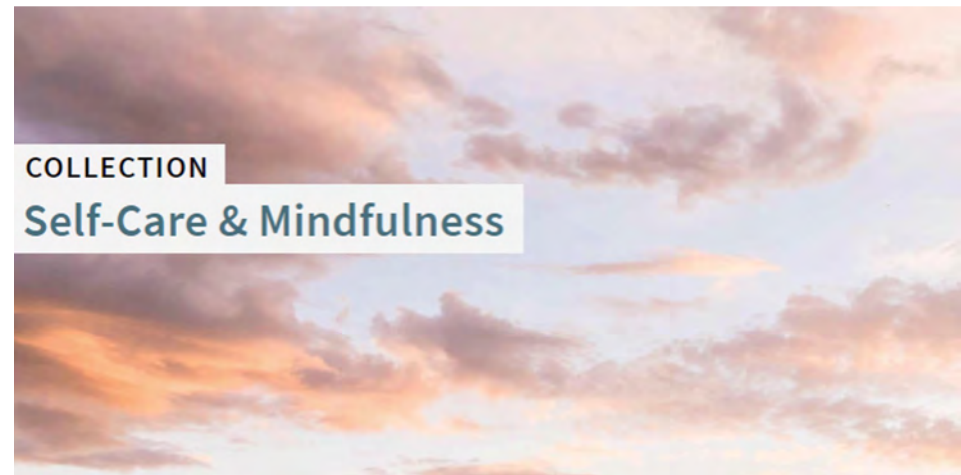
Discovering Collection Discovery

Laura Spradlin, Illinois Wesleyan University

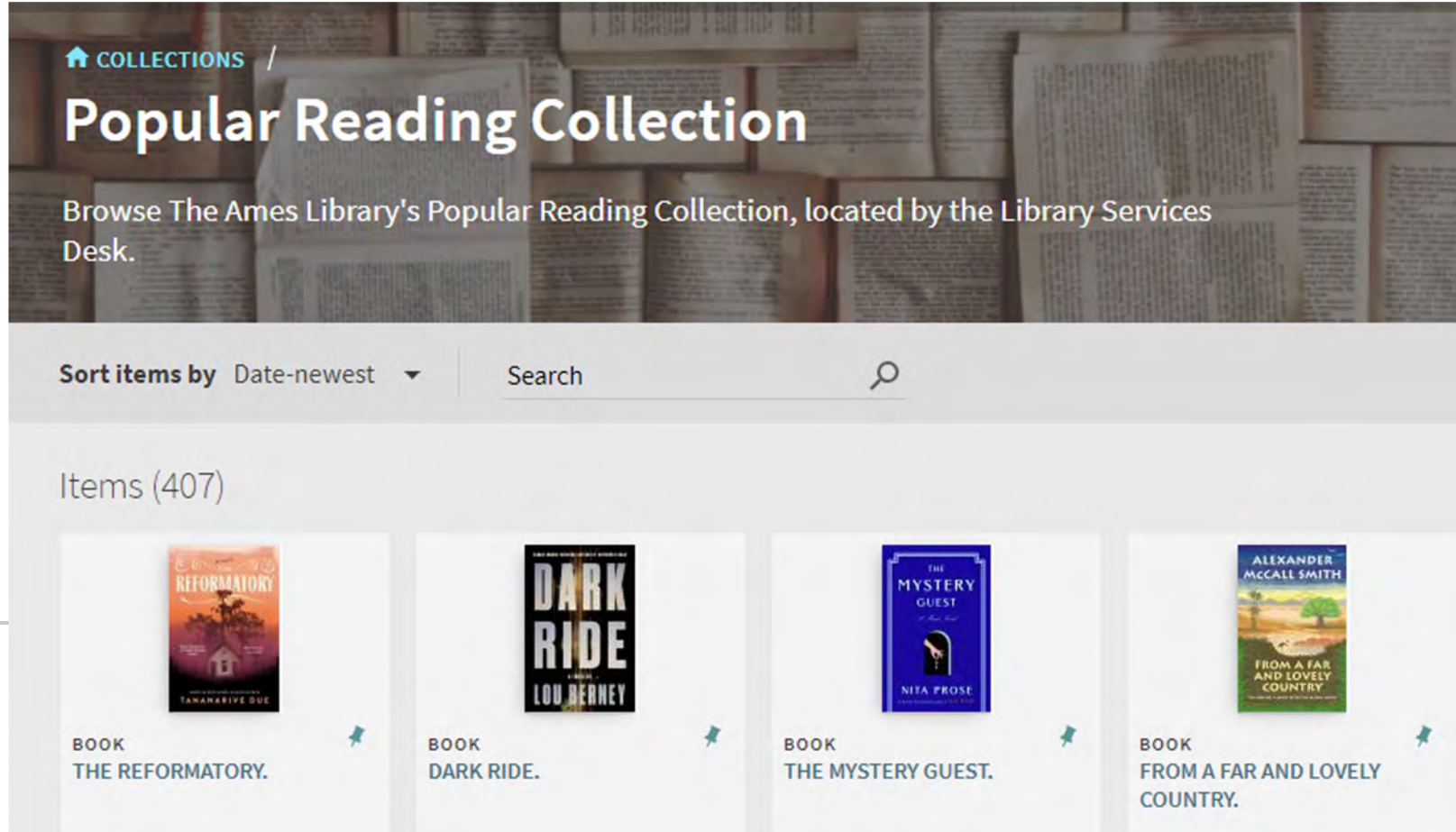
December 12, 2023

How & why we use Collection Discovery

- Highlight physical collections
- Easy to share links and QR codes
- Accompany displays



Collections Based on: Physical Location




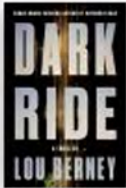


↑ COLLECTIONS /

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

The screenshot displays an advanced search interface with the following elements:

- Search Bar:** Contains "Physical titles" and "Title" dropdowns, a search icon, and a home icon.
- Search in:** "Physical titles" (dropdown), **Zone:** "Institution" (selected with a blue dot), "Network", and "Community" (radio buttons).
- Criteria 1:** "Holdings: Permanent physical location" (dropdown), "Equals" (dropdown), and "Ames Library : Popular Reading Collection (browse)" (dropdown with a close icon).
- Criteria 2:** "AND" (highlighted in blue), "OR" (button), "Title: Tag Suppressed (Tit" (dropdown), "Equals" (dropdown), and "No" (dropdown).
- Actions:** "Clear form" and "Search" buttons.

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.

Book By ALBOM, MITCH. (2023)

Creation Date: 12/06/2023 07:28:00 CST

Modification Date: 12/06/2023 07:28:00 CST

Language: English

ISBN: 9780062406651

MMS ID: 998146697805847

Edit Record

Holdings

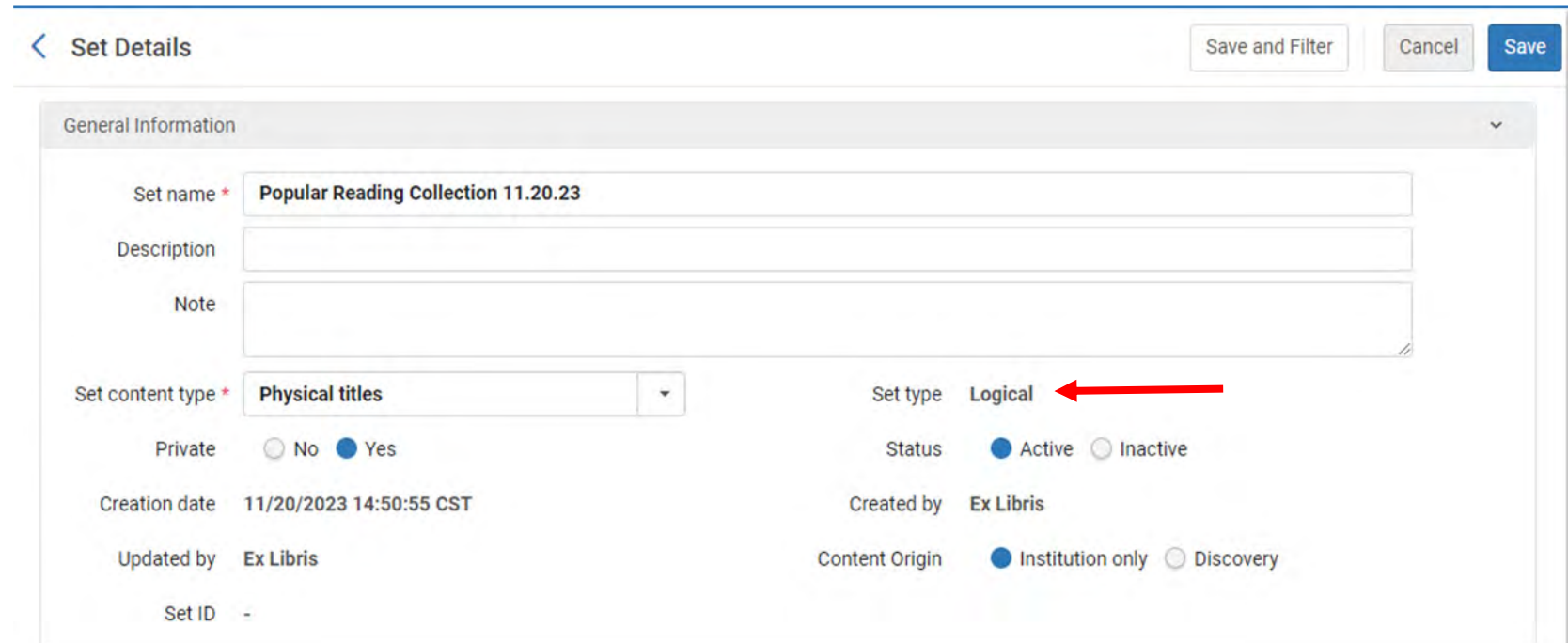


Collections Based on: **Physical Location**

Set Details

- Set name
- Description, notes
- Private: Yes or No

Click **Save**



Set Details Save and Filter Cancel Save

General Information

Set name * Popular Reading Collection 11.20.23

Description

Note

Set content type * Physical titles

Private No Yes

Creation date 11/20/2023 14:50:55 CST

Updated by Ex Libris

Set ID -

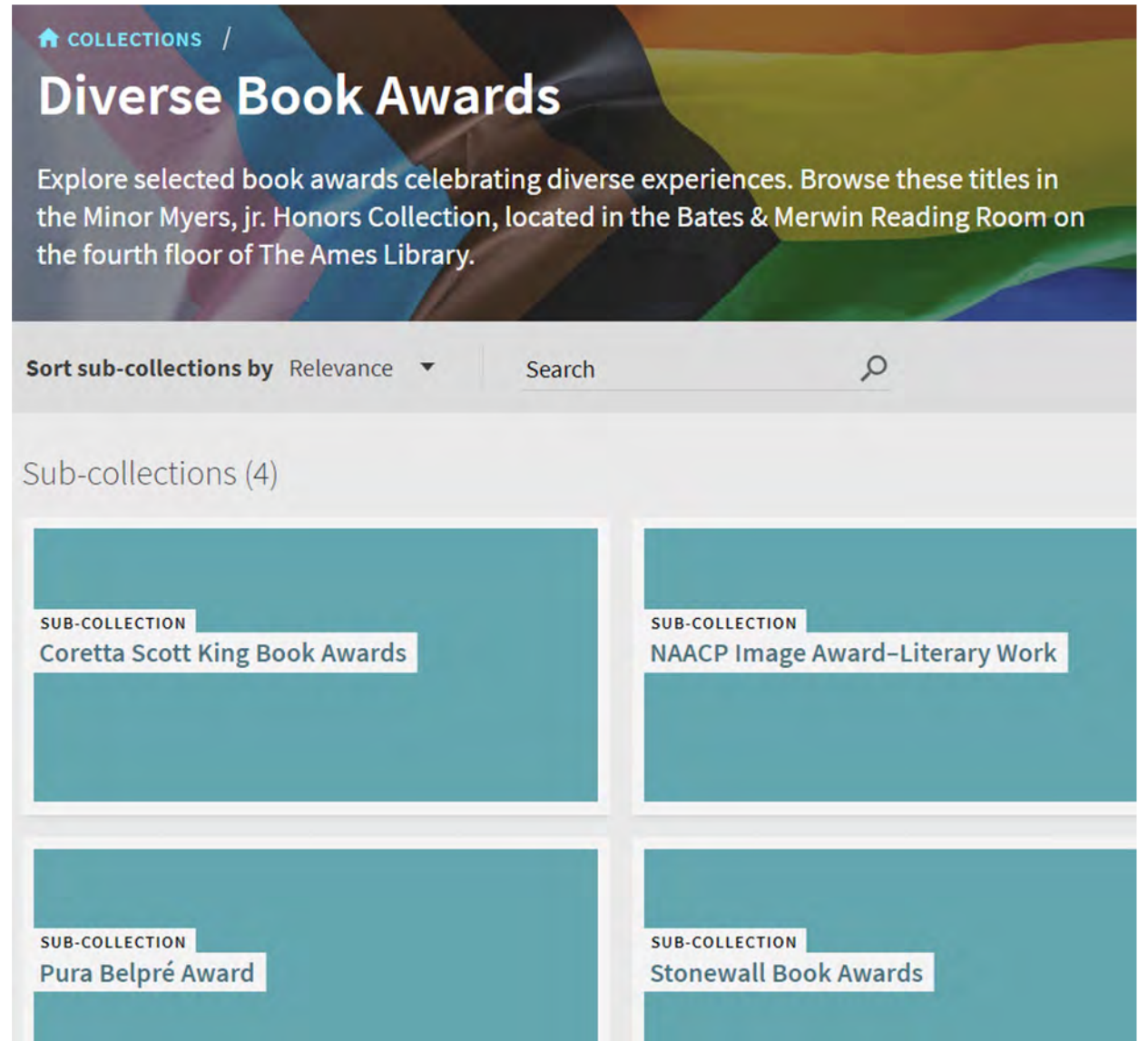
Set type Logical

Status Active Inactive

Created by Ex Libris

Content Origin Institution only Discovery

Collections Based on: Local Call Number



COLLECTIONS /

Diverse Book Awards

Explore selected book awards celebrating diverse experiences. Browse these titles in the Minor Myers, jr. Honors Collection, located in the Bates & Merwin Reading Room on the fourth floor of The Ames Library.

Sort sub-collections by Relevance ▾ Search 🔍

Sub-collections (4)

- SUB-COLLECTION
Coretta Scott King Book Awards
- SUB-COLLECTION
NAACP Image Award—Literary Work
- SUB-COLLECTION
Pura Belpré Award
- SUB-COLLECTION
Stonewall Book Awards

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

The screenshot shows an advanced search interface with the following elements:

- Search in: Physical titles ▾
- Zone: Institution Network Community
- Search criteria 1: Holdings: Permanent call number ▾ Contains Keywords ▾ Stonewall Book Award
- Search criteria 2: AND OR ▾ Equals ▾ Other scheme ▾
- Dropdown menu for the second criteria: Holdings : Permanent call number type
- Buttons: Clear form, Search

Creating Collections from Sets

Resources > Manage Inventory > Manage Collections

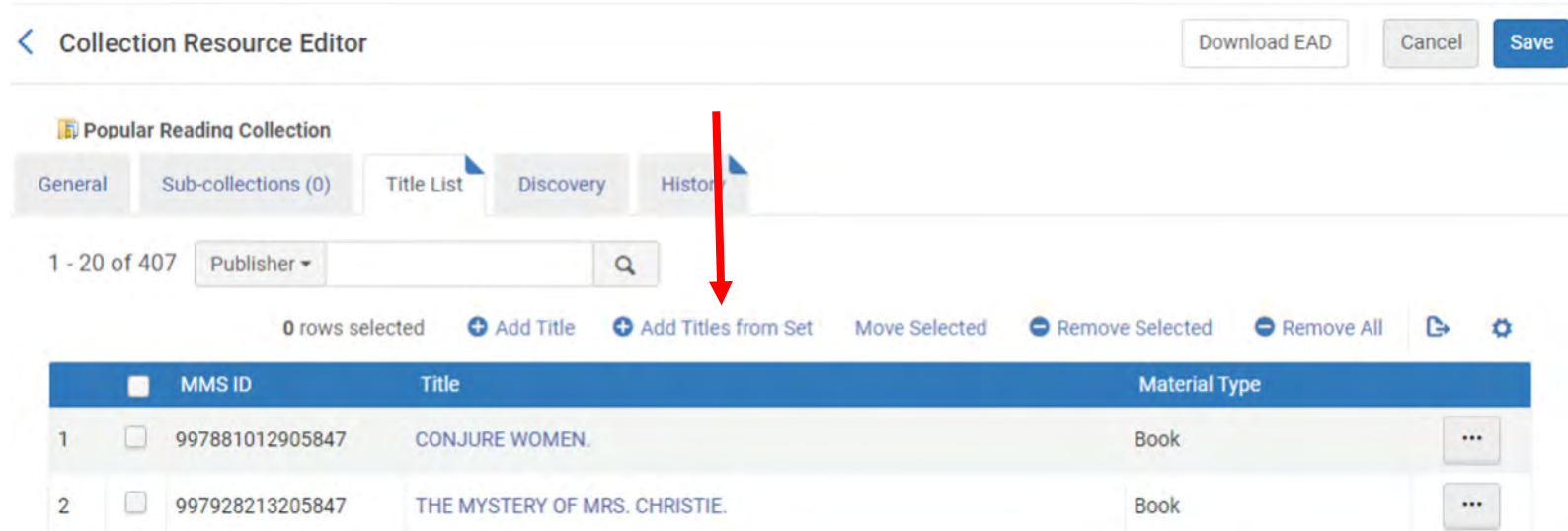
- Select existing collection or create new collection

Non-Logical Collection

- Title List tab >

Add Titles from Set

- Don't forget to Save!



The screenshot shows the 'Collection Resource Editor' interface for a 'Popular Reading Collection'. The 'Title List' tab is selected, and a red arrow points to the 'Add Titles from Set' button in the toolbar. Below the toolbar is a table with the following data:

	MMS ID	Title	Material Type	
1	997881012905847	CONJURE WOMEN.	Book	...
2	997928213205847	THE MYSTERY OF MRS. CHRISTIE.	Book	...

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

Add New Collection Save and continue Cancel Save

Top Level Collection

Bibliographic Record Information

Record Format: MARC21 Bibliographic

Title: Logical Collection

Suppress from Discovery:

General Information

Name: Logical Collection

Description:

Library: Ames Librar

External System:

External ID:

Thumbnail Upload:

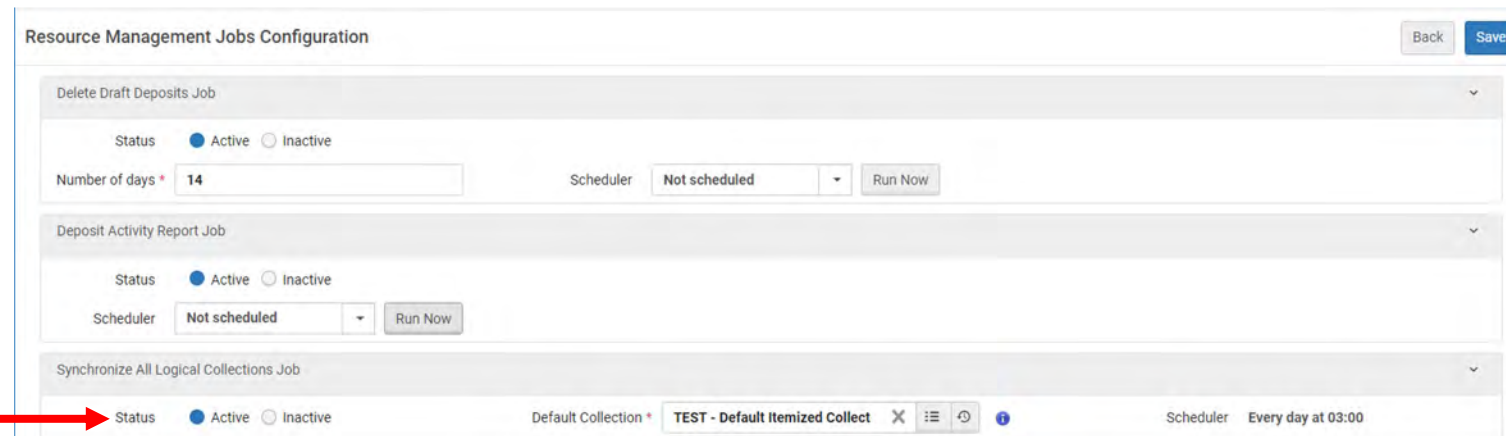
Place at/before: Bottom

Logical Collection:

Logical Collections: Automatic Title Assignment

Before creating a Logical Collection:

1. Must have collection titles in a logical set.
2. Create a suppressed 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



The screenshot displays the 'Resource Management Jobs Configuration' interface. It features three job configuration sections: 'Delete Draft Deposits Job', 'Deposit Activity Report Job', and 'Synchronize All Logical Collections Job'. The 'Synchronize All Logical Collections Job' section is highlighted with a red arrow pointing to the 'Status' field, which is set to 'Active'. The 'Default Collection' is set to 'TEST - Default Itemized Collect', and the 'Scheduler' is set to 'Every day at 03:00'. The interface includes 'Back' and 'Save' buttons in the top right corner.

Job Name	Status	Number of days	Scheduler	Run Now
Delete Draft Deposits Job	Active	14	Not scheduled	Run Now
Deposit Activity Report Job	Active		Not scheduled	Run Now
Synchronize All Logical Collections Job	Active		Every day at 03:00	

Logical Collections: Automatic Title Assignment (demo)

< Collection Resource Editor

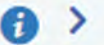
Download EAD

Cancel

Save

 Logical Collection

Logical Collection



General

Sub-collections (0)

Title List

Discovery

History

Publisher ▾



 [+ Assign Titles Set](#)



No records were found.

Logical Collections: Automatic Title Assignment (demo)

Manage Sets Cancel Select

1 - 9 of 9

	Active	Name	Type	Content Type	Content Origin	Creation Date
1	<input checked="" type="checkbox"/>	Popular Reading Collection 12.7.23	Logical	Physical titles	Institution only	12/07/2023 16:06:15 CST
2	<input type="checkbox"/>	Popular Reading Collection 12.1.23	Logical	Physical titles	Institution only	12/01/2023 13:33:22 CST
3	<input type="checkbox"/>	Pura Belpre Award 12.8.23	Logical	All Titles	Institution only	11/01/2023 09:32:48 CDT
4	<input type="checkbox"/>	Stonewall Book Award 11.1.23	Logical	All Titles	Institution only	11/01/2023 09:24:50 CDT
5	<input type="checkbox"/>	Popular Reading Collection 10.12.23	Logical	All Titles	Institution only	10/12/2023 09:07:15 CDT
6	<input type="checkbox"/>	Banned Books Collection 9.28.23	Logical	All Titles	Institution only	09/28/2023 13:18:59 CDT
7	<input type="checkbox"/>	Minor Myers, jr. Collection 12.1.23	Logical	All Titles	Institution only	09/25/2023 13:33:18 CDT
8	<input type="checkbox"/>	Banned Books Collection	Logical	All Titles	Institution only	09/07/2023 08:55:29 CDT
9	<input type="checkbox"/>	Reindex Test - Pop Reading	Logical	All Titles	Institution only	08/03/2023 15:24:21 CDT

Logical Collections: Automatic Title Assignment (demo)

< Collection Resource Editor Download EAD Cancel Save

Logical Collection


Logical Collection i > f


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")

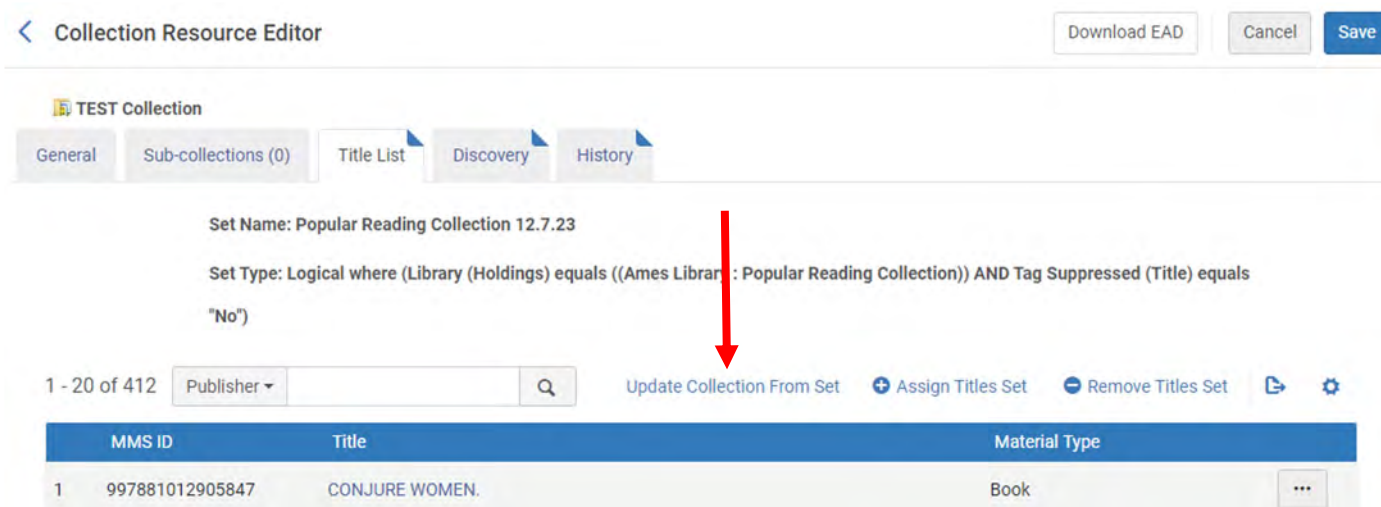
Publisher

 [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



The screenshot shows the 'Collection Resource Editor' interface for a 'TEST Collection'. The 'Title List' tab is active, displaying the following information:

- Set Name: Popular Reading Collection 12.7.23
- Set Type: Logical where (Library (Holdings) equals ((Ames Librar : Popular Reading Collection)) AND Tag Suppressed (Title) equals "No")

Below the set information, there is a search bar with '1 - 20 of 412' results and a 'Publisher' dropdown. A red arrow points to the 'Update Collection From Set' button. Other buttons include 'Assign Titles Set', 'Remove Titles Set', and a settings gear icon.

MMS ID	Title	Material Type	
1	997881012905847	CONJURE WOMEN.	Book

- 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

rec

The screenshot displays the Alma search interface. At the top, a search bar contains the query '998146697805847'. Below the search bar, a 'Facets' sidebar on the left lists various filters: Material Type (Book (1)), Resource Type (Book - Physical (1)), Language (English (1)), Publication Year (2023 (1)), and Collection (Popular Reading Coll... (1)). A red arrow points to the 'Collection' facet. The main results area shows one result: 'THE LITTLE LIAR.' by ALBOM, MITCH. (2023). Below the title, there are tabs for 'Physical (1)', 'Electronic', 'Digital', 'Collections (1)', and 'Other details'. A red arrow points to the 'Collections (1)' tab. Underneath the 'Collections (1)' tab, a table lists the collection name: 'Popular Reading Collection'.

All titles ▾ Keywords ▾ 998146697805847 X ⬆️ 🔍

Facets << All Titles (1 - 1 of 1) 998146697805847

Material Type ▾
Book (1)

Resource Type ▾
Book - Physical (1)

Language ▾
English (1)

Publication Year ▾
2023 (1)

Collection ▾
Popular Reading Coll... (1)

🏠 Institution Network Community

Select All Sort by : Title - Asc ▾ Secondary Sort by : Rank ▾

1 **THE LITTLE LIAR.**
Book (Book - Physical) By ALBOM, MITCH. (2023)
Creation Date: 12/06/2023 07:28:00 CST

Language: English
Modification Date: 12/06/2023 07:28:00 CST
ISBN: 9780062406651

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

1 Collection

Collection Name
Popular Reading Collection



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 Committee



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



Questions?

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