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# How to use Logical Collections for Digital Resource Management

Explanation and Live Demonstration

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Introduction

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Creating the Logical  
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# Introduction

## Introduction

- Until now titles could be added to a 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

- It is now possible to assign titles to collections **automatically** based on a logical query instead of assigning them manually. This is a significant timesaver.
- This is done via a new Logical Title Level Collection.
- 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 collection.
- This eliminates the need to manually add a title or manually click “Add Titles from Set”
- Note that while it is possible to add records with any type of inventory (or no inventory) to title level collections, this presentation will focus specifically on Digital titles.
- See also the on line 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 "Digital Titles".
- First, we will create a set of all digital titles with word from subject or word from title "Taiwan".
- Then we will attribute the logical set to a Logical Collection.



## Creating the Logical Query

- Here we are searching for all digital titles where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")

Search in: **Digital titles** ▾ Zone:  **Institution**  Community ✕

Title: Title ▾	Contains Keyword ▾	Taiwan	+ 📄 ✕	
<b>AND/OR</b>	Title: Subjects ▾	Contains Keyword ▾	Taiwan	+ 📄 ✕

[Clear form](#)

## Creating the Logical Query

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

Digital Titles (1 - 15 of 15) | [where \(Title contains keywords "Taiwan"\) OR \(Subjects contains keywords "Taiwan"\)](#) Push Selected to MDE Save and Filter Query

9 <input type="checkbox"/>		<b>Structural equivalence in a library and information science journal network in Taiwan</b> <b>Journal</b> By Chen, Ya-Ning (2019) <b>Subject:</b> Library science–Taiwan. <b>Creation Date:</b> 19/04/2020 11:30 <b>Modification Date:</b> 14/05/2022 14:53	<b>Language:</b> English <b>Record number:</b> YILIS202004191227	<b>MMS ID:</b> 99258711200121	<a href="#">Edit Record</a> <a href="#">Push to MDE</a> <a href="#">...</a>
<p><input checked="" type="radio"/> Digital (1)   <input type="radio"/> Collections (1)   <a href="#">Other details</a></p>					
10 <input type="checkbox"/>		<b>Research status and characteristics of library and information science in Taiwan: a bibliometric analysis</b> <b>Journal</b> By Wen-Yau, Cathy Lin (2012) <b>Subject:</b> Library science–Taiwan. <b>Creation Date:</b> 19/04/2020 08:03 <b>Modification Date:</b> 14/05/2022 15:03	<b>Language:</b> English <b>Record number:</b> YILIS202004190901	<b>MMS ID:</b> 99258711300121	<a href="#">Edit Record</a> <a href="#">Push to MDE</a> <a href="#">...</a>
<p><input checked="" type="radio"/> Digital (1)   <input type="radio"/> Collections (1)   <a href="#">Other details</a></p>					

## Creating the Logical Query

- We will call our Digital Titles Logical Set “Digital titles with title or subject Taiwan”

< Set Details Save and Filter Cancel Save

General Information

Set name\* **Digital titles with title or subject Taiwan**

Description **digital titles where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")**

Note

Set content type\* **Digital titles**

Private  No  Yes

Creation date **18/08/2023 13:26**

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

Manage Sets (1 - 7 of 7) Create Itemized Set Create Logical Set

Sort by: Creation Date Scope: My Sets Status: All Delete ... ... ...

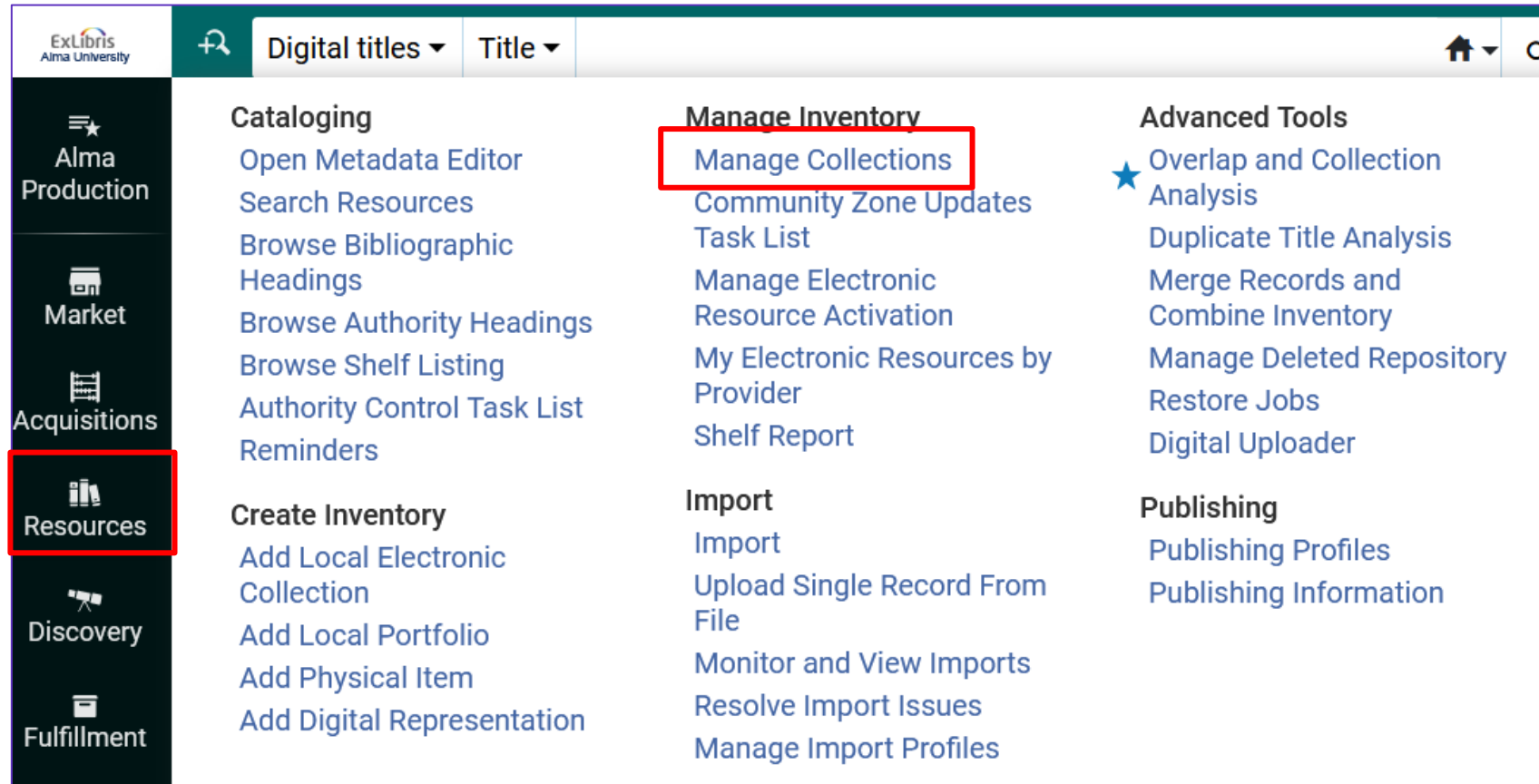
1	<input type="checkbox"/> Digital titles with title or subject Taiwan Logical Active	Digital titles Institution only Created by Alicia Chen Created On 18/08/2023 13:26	<span>Content</span> <span>...</span>
2	<input type="checkbox"/> Physical Titles Subject LC Taiwan Resource Type Book Physical Logical Active	Physical titles Institution only Created by Alicia Chen Created On 20/07/2023 14:52	<span>Content</span> <span>...</span>
3	<input type="checkbox"/> Creator Sheryl Sandberg Logical Active	All Titles Institution only Created by Alicia Chen Created On 05/07/2023 09:40	<span>Content</span> <span>...</span>



# Creating the Logical Collection

# Creating the Logical Collection

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






# Creating the Logical Collection

- We will add a new Top-Level Collection

< Top Level Collections Cancel

1 - 34 of 34    0 rows selected + Add Top-Level Collection

			MMS ID	Collection ID	Collection Name	Description	Creation Date		
⋮	1	<input type="checkbox"/>		99257411300121	815539000000121	<a href="#">Library and Information Science Scholarly Articles</a>	Library and Information Science Scholarly Articles	13/04/2020 09:35	⋮
⋮	2	<input type="checkbox"/>		99111411300121	8131549960000121	<a href="#">Feminist Studies</a>	A compilation of resources and images pertaining to Feminist Studies and related disciplines	04/04/2017 17:42	⋮
⋮	3	<input type="checkbox"/>		99256211300121	8155270000000121	<a href="#">Flowers of Israel</a>	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	⋮



## Creating the Logical Collection

- On the next slide we are adding a new Top-Level Collection called "Titles About Taiwan".
- 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\* **Titles about Taiwan**

Suppress from  
Discovery

General Information

Name\* **Titles About Taiwan**

Description **This is a set contains titles pertaining to Taiwan**

Library\* **Main Library**

External System

External ID

Logical Collection

Thumbnail Upload

Place at/before **Bottom**

We check here to designate this as a "Logical Collection"





# 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 “Digital titles with title or subject Taiwan” to this Logical Collection.

The screenshot shows the 'Collection Resource Editor' interface. At the top right, there are buttons for 'Download EAD', 'Cancel', and 'Save'. Below this, the logical collection 'Titles About Taiwan' is displayed with a flag icon. A table below shows the collection details:

PID	Library	MMS ID	Title
8184120290000121	Main Library	99503387600121	Titles about Taiwan

Below the table, there are tabs for 'General', 'Sub-collections (0)', 'Title List', 'Discovery', and 'History'. The 'Title List' tab is selected. A search bar for 'Publisher' is visible. On the right side, a red box highlights the '+ Assign Titles Set' button. Below the search bar, a message states 'No records were found.'

# Attributing a Set to the Logical Collection

- Now we will choose the desired set

< Manage Sets Cancel **Select**

1 - 5 of 5

	Active	Name	Type	Content Type	Content Origin	Creation Date
1	<input type="radio"/> <input checked="" type="checkbox"/>	feminist theory	Logical	Electronic titles	Institution only	18/08/2023 14:24
2	<input checked="" type="radio"/> <input checked="" type="checkbox"/>	Digital titles with title or subject Taiwan	Logical	Digital titles	Institution only	18/08/2023 13:26
3	<input type="radio"/> <input checked="" type="checkbox"/>	Physical Titles Subject LC Taiwan Resource Type Book Physical	Logical	Physical titles	Institution only	20/07/2023 14:52
4	<input type="radio"/> <input checked="" type="checkbox"/>	Creator Sheryl Sandberg	Logical	All Titles	Institution only	05/07/2023 09:40
5	<input type="radio"/> <input checked="" type="checkbox"/>	All titles word from subject halacha	Logical	All Titles	Institution only	05/06/2023 02:59

This is the set we created earlier

## Attributing a Set to the Logical Collection

- After attributing the logical set all titles from the set get added to the logical collection

The screenshot shows the 'Collection Resource Editor' interface. At the top right, there are buttons for 'Download EAD', 'Cancel', and 'Save'. The main header area includes a title 'Titles About Taiwan' with a flag icon, a PID '8184120290000121', and a library name 'Main Library'. Below this, there are tabs for 'General', 'Sub-collections (0)', 'Title List', 'Discovery', and 'History'. The 'Title List' tab is active, showing a 'Set Name: Digital titles with title or subject Taiwan' and a 'Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")'. A search bar at the top left shows '1 - 15 of 15' and a 'Publisher' dropdown. On the right, there are buttons for 'Update Collection From Set', '+ Assign Titles Set', and '- Remove Titles Set'. A table below lists titles with columns for 'MMS ID', 'Title', and 'Material Type'. The first three rows are visible:

MMS ID	Title	Material Type
99132310200121	Famous People from Taiwan	Book
99207410800121	Yoel with FlySheet and Ex Libris employees at Taiwan Ex Libris Day at National Chung Hsing University September 18, 2019	Visual material
99207410900121	Yoel speaking on panel at Taiwan Ex Libris Day at National Chung Hsing University September 18, 2019	Visual material

This is the query of the set we created earlier

1 - 15 of 15

All 15 titles from the set have been added to the logical collection



**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 collection (this is the significant time saver of this feature).
- The synchronization of the titles from the logical set to the logical 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 would click “Update Collection From Set” if he or she did not want to wait for the scheduled job “Synchronize All Logical Collections Job” to run

The screenshot shows the 'Collection Resource Editor' interface. At the top, there are buttons for 'Download EAD', 'Cancel', and 'Save'. Below this, the 'Titles About Taiwan' section is visible, including a flag icon and the title. The PID is 8184120290000121, the Library is Main Library, and the MMS ID is 99503387600121. The title is 'Titles about Taiwan'. There are tabs for 'General', 'Sub-collections (0)', 'Title List', 'Discovery', and 'History'. The 'Title List' tab is selected and highlighted with a red box. Below the tabs, the 'Set Name' is 'Digital titles with title or subject Taiwan' and the 'Set Type' is 'Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")'. There is a search bar with '1 - 15 of 15' results and a 'Publisher' dropdown. A table of titles is displayed with columns for MMS ID, Title, and Material Type. The 'Update Collection From Set' button is highlighted with a red box and a red arrow pointing to it. Other buttons include '+ Assign Titles Set', '- Remove Titles Set', and a settings icon.

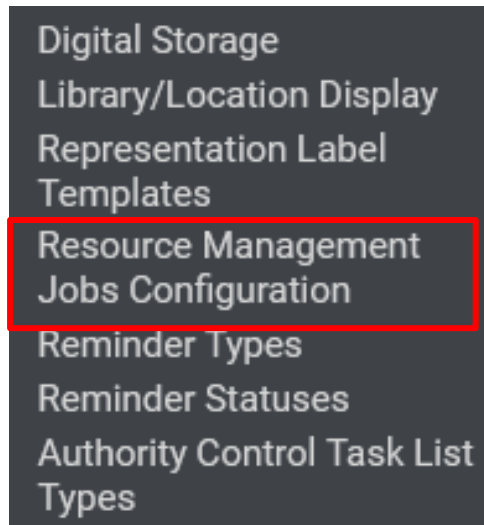
MMS ID	Title	Material Type
1	Famous People from Taiwan	Book
2	Yoel with FlySheet and Ex Libris employees at Taiwan Ex Libris Day at National Chiao Tung University September 18, 2019	Visual material

## 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"

## Ongoing Update of the Collection From the Set

- Access “Resource Management Jobs Configuration” at “Configuration > Resources > Other”



## Ongoing Update of the Collection From the Set

- In the “Synchronize All Logical Collections Job” change the status to “Active”



The screenshot shows a configuration interface for a job. The job name is "Synchronize All Logical Collections Job", which is highlighted with a red box. Below the name, there is a "Status" section with radio buttons for "Active" (selected) and "Inactive". To the right, there is a "Default Collection\*" dropdown menu currently set to "Miscellaneous Digital Items". Further right, there are icons for a close button, a list, a refresh, and an information icon. On the far right, the "Scheduler" is set to "Every day at 04:00".

Change the status to “Active”

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 Set will be assigned if the designated Logical Collection will be deleted.
- For example, in our case digital titles from logical set “Digital titles with title or subject Taiwan” are in logical collection “Titles About Taiwan”.
- If someone were to delete logical collection “Titles About Taiwan” the digital titles in that logical collection would need to be assigned a different Title Level Collection. This is the “Default Collection”

## Ongoing Update of the Collection From the Set

- Let's see what happens when a new title is added to the logical set "Digital titles with title or subject Taiwan".

Titles About Taiwan

PID 818412029000121 Library Main Library MMS ID 99503387600121 Title Titles about Taiwan

General Sub-collections (0) Title List Discovery History

Set Name: Digital titles with title or subject Taiwan

Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")

1 - 15 of 15 Publisher

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

	MMS ID	Title	Material Type	
1	99132310200121	Famous People from Taiwan	Book	...
2	99207410800121	Yoel with FlySheet and Ex Libris employees at Taiwan Ex Libris Day at National Chung Hsing University September 18, 2019	Visual material	...

Currently there are 15 titles in the logical collection



# Ongoing Update of the Collection From the Set

The screenshot shows the Ex Libris Primo interface. At the top, there are navigation tabs: Save, New, Record Actions, Editing Actions, Add Inventory, View Related Data, and Order. Below this, a record is selected with the title "Skyline of Taipei with Xinyi Special District (on the right)" and ID (995033874001). A dropdown menu is open, showing options: Add MARC21 Holdings, Books, Default template for Alma University (Default), Add Item, Add Portfolio, and Add Representation. A red box highlights the "Add Representation" option. A yellow callout box points to the title of the selected record. Another yellow callout box points to the "Add Representation" option. A third yellow callout box points to a record with the subject "Taiwan".

Title "Skyline of Taipei ..."


We will add a representation to this new record

This record will be added to the logical set because it has word from subject "Taiwan"

001	99503387400121
005	20230818155226.0
008	151127s2023####xx#--##o##### 00#i eng#d
035	\$\$a YILIS202308181650
245	0 0 \$\$a Skyline of Taipei with Xinyi Special District (on the right
336	\$\$a still image \$\$2 rdacontent
337	\$\$a computer \$\$2 rdamedia
338	\$\$a online resource \$\$2 rdacarrier
347	\$\$a image file \$\$b JPG \$\$2 rda
520	\$\$a Miscellaneous Digital Items
650	0 \$\$a Maps \$\$z Taipei
651	0 \$\$a Taiwan

## Ongoing Update of the Collection From the Set

- The title "Skyline of Taipei ..." is now a digital title in collection "Miscellaneous Digital Items".

1   **Skyline of Taipei with Xinyi Special District (on the right)**

**Visual material {Undefined} still image;  
computer; online resource (2023)**      **Language: English**  
**Subject: Maps--Taipei Taiwan**      **Modification Date: 18/08/2023 15:52**  
**Creation Date: 18/08/2023 15:50**      **Record number: YILIS202308181650**


[Physical](#)   [Electronic](#)   ● [Digital \(1\)](#)   **Collections (1)**   [Other details](#)

**1 Collection**

Collection Name
<a href="#">Miscellaneous Digital Items</a>

## Ongoing Update of the Collection From the Set

- The title "Skyline of Taipei ..." is not yet in logical collection "Titles About Taiwan".

 Titles About Taiwan i v


PID	Library	MMS ID	Title
8184120290000121	Main Library	99503387600121	Titles about Taiwan

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

Set Name: Digital titles with title or subject Taiwan


Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")

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

  
No records were found.

## Ongoing Update of the Collection From the Set

- The logical collection “Titles About Taiwan” still has 15 records

 Titles About Taiwan i v



PID 8184120290000121 Library Main Library MMS ID 99503387600121 Title Titles about Taiwan

General Sub-collections (0) Title List Discovery History

Set Name: Digital titles with title or subject Taiwan

Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")

1 - 15 of 15

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

	MMS ID	Title	Material Type	
1	99132310200121	Famous People from Taiwan	Book	...
2	99207410800121	Yoel with FlySheet and Ex Libris employees at Taiwan Ex Libris Day at National Chung Hsing University	Visual material	...


Currently there are 15 titles in the logical collection

## 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"

## Ongoing Update of the Collection From the Set

- The title "Skyline of Taipei ..." is now in logical collection "Titles About Taiwan".

1   Skyline of Taipei with Xinyi Special District (on the right) Edit Record Representations ...

**Visual material {Undefined} still image; computer; online resource (2023)**      **Language:** English      **MMS ID:** 99503387400121  
**Subject:** Maps--Taipei Taiwan      **Modification Date:** 18/08/2023 15:52  
**Creation Date:** 18/08/2023 15:50      **Record number:** YILIS202308181650

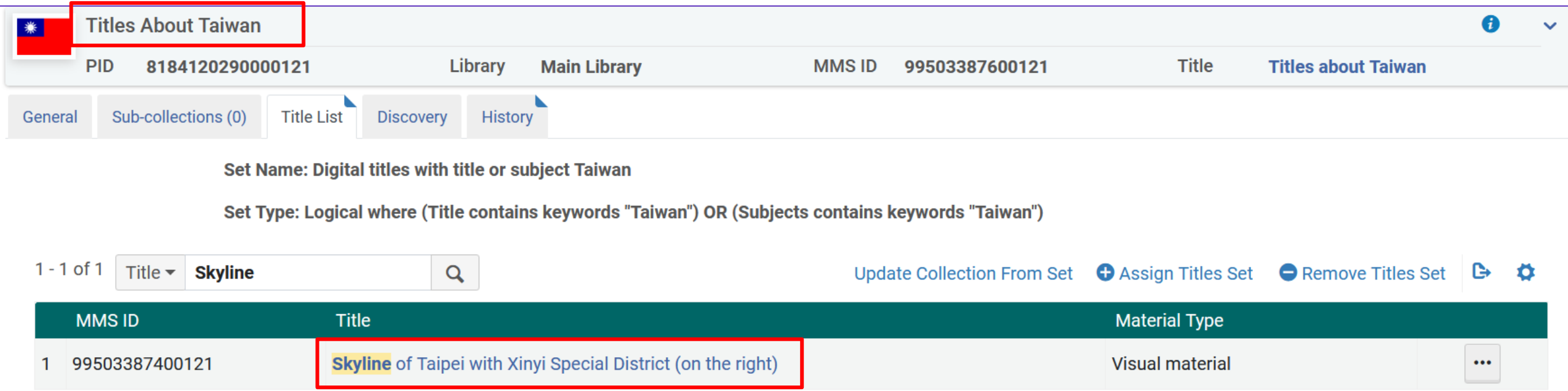
[Physical](#)   [Electronic](#)   ● [Digital \(1\)](#)   **[Collections \(2\)](#)**   [Other details](#)


**2 Collections**

Collection Name
Miscellaneous Digital Items
<b>Titles About Taiwan</b>

## Ongoing Update of the Collection From the Set

- The title "Skyline of Taipei ..." is now in logical collection "Titles About Taiwan".



 **Titles About Taiwan** i

PID 8184120290000121 Library Main Library MMS ID 99503387600121 Title **Titles about Taiwan**

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

Set Name: Digital titles with title or subject Taiwan

Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")


1 - 1 of 1 Title   Update Collection From Set  Assign Titles Set  Remove Titles Set

MMS ID	Title	Material Type
1 99503387400121	<b>Skyline</b> of Taipei with Xinyi Special District (on the right)	Visual material <input type="button" value="More"/>



# Ongoing Update of the Collection From the Set

- There are now 16 records in the logical collection

 Titles About Taiwan



PID 8184120290000121 Library Main Library MMS ID 99503387600121 Title **Titles about Taiwan**

General Sub-collections (0) Title List Discovery History

Set Name: Digital titles with title or subject Taiwan

Set Type: Logical where (Title contains keywords "Taiwan") OR (Subjects contains keywords "Taiwan")

1 - 16 of 16 Title

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

	MMS ID	Title	Material Type	
1	99132310200121	Famous People from Taiwan	Book	...
2	99207410800121	Yoel with FlySheet and Ex Libris employees at Taiwan Ex Libris Day at National Chung Hsing University September 18, 2019	Visual material	...
3	99207410900121	Yoel speaking on panel at Taiwan Ex Libris Day at National Chung Hsing University September 18, 2019	Visual material	...



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