# Logical Sets - Sets Module

This is the second section of the sets module of the Alma Overviews course. The video is at the top of the page, followed by the script.

In this video, you'll review:



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## Logical Sets (dynamic)

Ok, that's a little bit about sets. Now, let's talk about logical sets and get back to our Saved Query button.

- Any time that you save a search query in Alma, you create a **logical set**. Logical sets can also be created directly from the Manage Sets page.
- Logical sets are repopulated dynamically every time that you re-run the query.
- **Note that y**ou cannot save individual items, but you can turn the results of a logical set into an itemized set (we'll get to this in a later video) and then add individual items to that.

## Create a Logical Set

Let's begin by creating a  logical set. Most often, you'll create a logical set by saving a query you've already constructed. Let's recreate a query from the Searching module as an example, to answer the question: **What materials are available on the subject of *democracy* in Spanish at the Widener Library?**

1. First, I'll choose the search type **Physical Items**, because I want to see what materials are available on the shelf right now, and the Item record gives us that information.
2. Now, I'm going to choose Advanced Search, so I can conduct an advanced search for this.
3. For my first row, choose criteria Subjects (LC), Contains Keywords, *democracy*
4. For my second row, choose Permanent Physical Location, Equals, *Widener*. When I click into the search box, I can start typing Widener to find all of Widener Library as a location.
5. For my third row, choose Language, Equals, and again, I can click in here and start typing *Spanish*, then click on it to select it.
6. Because I want more recent materials in my set, for the fourth row, I choose **Publication Year, and for my operator I will go to *greater than or equals to*, *2000***
7. Now, with my search in place, I hit **Search**.

As soon as I have my search results, I can choose from facets down the left-hand side, or can sort materials say, by call number, if I wanted to be able to walk the shelves to find these materials easily. In this case, I will leave it all as it is.

I can see my search query, in case I want to know what it is, and here is that **Save Query** button.

Why would you save this query? Let's say you had a professor who taught Spanish-speaking students, or you had a Law students who were learning Spanish for an international law degree. They might want to see what materials are available before each semester starts, so they'd want to see the current set of results for this same query on a regular basis. This is one of the great things about saving a set. So, I'll click on Save Query.

And now, we have to add some **General Information** about my set. I will give my set a name: *Spanish-Language Materials ad Widener*. I will give it a Description: *For Professor X at Law.* If I had the course code, I could add that in there if I wanted to.

1. **The Set Name is** required and must be unique and useful for finding your set in a list.
2. **The Description** does not display in the lists of sets, but is searchable to help find your set later.
3. **The Note** does not display and is not searchable, but you can use this for information that will help if you need to edit your set later. So, "comes in once before each semester, usually 2 weeks before class starts
4. **The next in thing in our Set Details is the Set Content Type.** My set content type is set at Physical Items. If you choose to create a set from scratch, you will choose this set content type at this point. The Set Content Type is the type of records that will be in your set. When you save your query, it will automatically enter the search type you started with.
5. **Private** in this case means only you can see this set. You can set this to not Private, otherwise known as Shared or Public, and that would allow you to share with other Harvard Library staff users. Note that shared sets are **read-only** – only the creator of the set can edit it.
6. **Next I have the creation date, and "*updated by Ex Libris*" is just a starting point for the set.**
7. **The Set Type is *logical*.**

8. **The Status is *Active*.**
9. **And again, it'll say Created by Ex Libris just as a beginning point.**

Now, when you've got all of the options for your set, click **Save**, and you'll be taken to your list of sets. You get straight to this list at any time by going to the Admin menu and choosing Manage Sets.

## View Results

To **view** the results of a logical set, find the set that you want in your list – so *Spanish-Language Materials at Widener* – and click on the row action items icon (the ellipsis) for the set you want to see the results of. Click on it, then click on **Results**, and Alma will display the contents of that set.

**Note** that clicking on the title of the set or choosing **Edit** from the row action item list will only let you edit the Set Details, **not** the actual search query.

## Editing Item Set Details

However, if you do want to edit and change any of the details at any time, you can do that, including the set name – it just has to still be unique. Again, just click on the title or click on the ellipsis and choose **Edit**. You can change anything except the content type or the set type. Click **Save** when done.

Again, you can make your set Private to begin with, and then make it Public later on if you wanted to.

So, let's do a quick review and look at the results of our Spanish-Language Materials at Widener. If I click on the row action item list and Results, I will now re-run that query and get a current set of results. In my case there won't be any changes because I just re-ran this from a few minutes ago, but if I re-run this two months from now, there might be a significant change in the results.

## Changing a Logical Set Query

If you want to change your query after you've saved it for the first time:

1. Go to **Manage Sets** and click on the row action items list for the set you want to change.
2. Do what I just did and click on **Results** to re-run the query.
3. Now, change the elements of the query that you want to change, either in the advanced search form at the top, the facets down the left, or in the sort. It will save any of those choices.
    1. In this case, I'm going to make it just Books that I want to have in my results, and I'm going to sort it by Call Number so that I can easily walk the shelves and find all 1500 of these, if I wanted to.
4. If I needed to re-run my search – if I had changed my search criteria at the type – I could re-do that now, but in this case, we're going to leave that search as it is and click on Save Query.

You'll see that I'm now back at my General Information page. If I needed to change this, I would now change it to *Books at Widener*, for instance. I'm going to leave everything else, and now click on Save to save my changes.

Please note that this will *re-write and overwrite the previous version*. If you wanted to keep the previous version and create a second, slightly different version, I could go to same set and from the row action item list, choose **Duplicate**. This will create a copy of the *Spanish-Language Books at Widener* set, and I could go in and change that query by clicking on Results and changing the query as we just showed.

## So, what are logical sets good for?

We've just seen a complex reference question that other students or another professor for a particular class might want. It could also be a question asked by a researcher who'll be back once a month to see what's new that matches the query. In a completely different functional area, you could create a logical set that contains order or other records you need to review periodically to monitor orders or for collection development or acquisitions, such as purchases made for a particular collection or a bequest.

As another example, here's a set that monitors orders made for the Law Library that have Interested Users, being used as an internal routing tool at the Law Library for faculty. So, at any time, I could click on Results and see which orders are current that have Interested users by the fund code for Law, which is 265 followed by the asterisk (*) to capture all of the funds.

Logical sets are just one type of set available to us in Alma. In the next segment, we'll look at Itemized Sets, where instead of a saved query, you create a set out of individual records.