

CARLI event notes from Fundamentals of Sets and Jobs Knowledge Days Session. July 1, 2021

CARLI: Today's session was interesting. We've been using sets and jobs since migration. The webinar pointed out P2E cleanup as a use case for sets and jobs.

Jen: Combining Sets was mentioned in the webinar and you can use AND, NOT, or OR when you combine them to achieve different results. This webinar seemed a bit more "advanced" than "fundamental" at times.

Q: Personally, I didn't think this was a 'fundamentals' webinar, as I have no experience in sets. Normalization rules were totally over my head. I was trying to follow her in ALMA but that was impossible--she was fast!

CARLI: Using Normalization Rules as job definitely seems more Advanced as well.

Gordon notes that this is only one use case of sets.

CARLI: There are a lot of other basic use cases for creating a set saving a search query to return to it so you don't have to keep recreating it. This is a good use for a Logical Set.

A: There are good directions on the CARLI site for creating normalization rules. I thought it was quite easy to create one and get it working.

CARLI: I agree norm rules are complicated unless using one already written for your goals.

Q: For purchased ebooks for say JSTOR DDA/EBA collections, would it be best practice to create an itemized set or an electronic collection to make sure you know what is available perpetually? I was a little worried about breaking the CZ connection if I moved the portfolio to a local collection.

A: Correct.

Denise: it's also possible to link local portfolios to the CZ. see

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources#Linking_a_Local_Electronic_Collection_to_the_Community_Zone](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources#Linking_a_Local_Electronic_Collection_to_the_Community_Zone)

Jen: Those that are purchased, deactivate in the DDA and activate in the CZ.

Q: I'm curious if sets and job can be used for dealing with eBooks that expire (that are on the 24 month plan, or whatever)?

A: If you have a way to identify those ebook records that you want to deactivate because they are on a plan or expiring, yes, there is a job to Deactivate Portfolios. You could certainly use that with a Set you've created.

Q: For some things, norm rules have really allowed us to clean things up quickly. Correcting ind1 of the 852 for the call number type, adding call number prefixes/suffixes that we didn't use in Voyager, also moving items from one location to another. It's my understanding that using a norm rule to change location is preferred because the change holding job will result in the deletion of the old holding and then creation of a new holding with the new location.

A: This is one of the examples she presented in the webinar (change Ind1 of 852).

Gordon: There is a job that starts with items (change holding job?) to change locations and other data, but instead of updating the holdings it DELETES them and READDS them, so you if you have notes or other data in the holdings that will be lost using this job. Instead, CARLI recommends:

How To: Changing Holdings & Item Records Permanent Locations:

<https://www.carli.illinois.edu/products-services/i-share/physical-res-man/location-change>

Q: That would work for DDA. But I think we have the whole EBA CZ collection active.

A: When I used Summon/360, I did exactly what is being described

A: That's what we do - we have a local collection for our Jstor DDA and then when a title is purchased, we activate the in the CZ collection - and de-activate the local portfolio.

Q: I agree with Lynne. Fundamentals made me hope for a bit more "use case back info". Like when is it better to delete the sets versus why keep old sets? And the Restore Jobs was new to me, I wondered when you might want to check the box about Keep Overwritten. No question here, just an observation.

Q: Lori, I'd like to know the answer to deleting sets you are finished with. I'm working on moving books from a location I want to delete to the stacks and I call my sets Cart 1, Cart 2, etc. Would deleting them be appropriate.

A: if you're done with the set, there aren't best practices, if you have a set that you're done with, logical sets you might keep because they are updated when you open it, but you can deleted itemized sets to keep your list of sets down.

A: There are some sets that I keep long-term to monitor things moving forward, for instance sets that identify item records that don't include a copy number or material type, etc.

A: I definitely delete sets I'm done with

A: Alma Essentials has a section on Sets and Jobs that's a little more basic than this was; also Normalization

Rules: https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English

A: I had all the sets that I every created, but then started deleting them. Would like a guideline: why would you want to keep sets or why to check the box about overwritten.

Jen: no limit to the number of sets Alma will let you create. Need to create a best practices for "when do you keep and when do you delete sets" but obviously YMMV.

A: yeah, I also have some running (logical) sets that I check periodically for various things, like records with elevated cataloger levels that shouldn't be

Jen: a good one to run that set to find records that have cat levels of 50 or 90, etc. to correct them to what they should be.

A: also, there's a Cloud App to bulk delete sets if you have a lot of them to clean out that you don't want anymore :)

CARLI: Cloud Apps were mentioned as an aside during the presentation, though we haven't really experimented with those yet.

A: @Cindy great idea. thanks

One help page shared was about creating sets from files and a Best Practices Toolkit for Purging Users

Purging Users Best Practices: https://knowledge.exlibrisgroup.com/Alma/Best_Practices_and_How-Tos/Miscellaneous/Best_Practices_Toolkit%3A_Purging_Users

Jen: For itemized sets, you can add users (or members/titles) one by one or from a file. If you use a file, you must use the correct header. See

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/080Managing_Search_Queries_and_Sets#Creating_Itemized_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/080Managing_Search_Queries_and_Sets#Creating_Itemized_Sets) for the list of Headers. You can also filter sets with indication rules. See

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/080Managing_Search_Queries_and_Sets#Filtering_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/080Managing_Search_Queries_and_Sets#Filtering_Sets) and

[https://knowledge.exlibrisgroup.com/Alma/Best Practices and How-Tos/Metadata Management - Rules/Indication Rules](https://knowledge.exlibrisgroup.com/Alma/Best_Practices_and_How-Tos/Metadata_Management_-_Rules/Indication_Rules).

Q: Will there be some future sets we can run for our repository that will help with the problem mentioned in the email sent to liaisons on 6/29? "CARLI has recently learned from Ex Libris that we are currently storing a greater number of bibliographic title records in the Alma cloud than we have contracted for."

Ted: There will be future sets, yes. Working with ExL as noted in the message on identifying reports and other ways to locate and find the resources and CARLI will share it with libs when we have it. Will share details of what is considered duplicates/overage like elec resources that could be managed in NZ or stuff that has no inventory and don't need to be retained. Don't delete everything you find "suspect" - only remove what can be safely withdrawn. More info as we can provide it.

Q: should we keep merging duplicate bib records we find?

Ted: yes.

Community Knowledge page shared during webinar:

[https://knowledge.exlibrisgroup.com/Alma/Community Knowledge/How to Load Patrons from Alma Sandbox to Alma Production in the Event of a Data Loss](https://knowledge.exlibrisgroup.com/Alma/Community_Knowledge/How_to_Load_Patrons_from_Alma_Sandbox_to_Alma_Production_in_the_Event_of_a_Data_Loss)

Jen: One of the other useful tips: you could define a set of PO lines and change a reporting code. if you want to check that a purchase code is being added, you could use a logical set. You could run a job to add a reporting code. She did also mention using the sandbox to test more advanced jobs. You can make a test set of a job and it's a good idea. Info about how to access the sandboxes is in your institution's Box folder.

Sandboxes: <https://www.carli.illinois.edu/products-services/i-share/alma/sandbox> - links and how to log in

Denise, Jen, Jessica: the sandboxes will be refreshed on August 8th. Refreshed every 6 months.