



Creating Sets and Running Jobs

Ex Libris Professional Services

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Glossary of Terms

Sets: used for saving queries, publishing metadata, moving a group of records to the Metadata Editor, and for running processes

Logical Set: same as a Repository search saved query, the population of which is determined by the results of the particular search associated with the set; the population of the logical set is determined dynamically, reflecting the records currently in the repository; if records have been added to (or deleted from) the repository since the logical set was created, these records are included in (or removed from) the logical set population the next time you run the logical set search query.

Itemized Set: consists of individual records in the Repository, selected by the search operator and associated with the Itemized set on the basis of some predetermined criteria.

Content Type: a drop-down field in the set parameters from which to choose the content of the set; choices made here influence what displays in available set options; see below for details on each resource-type:

All titles – bibliographic and holdings information from all records in the Repository

Physical titles – bibliographic and holdings information for physical resources

Electronic titles – bibliographic records for all electronic titles in the repository

Digital titles – bibliographic records for all digital titles in the repository

Digital files – item information for all digital files in the repository

Physical items – item- and holding-level information for physical resources

Electronic packages – package-level information about electronic resources

Electronic portfolios – specific coverage, services, and link information relevant for the titles in an electronic package

Authorities – authority records

Performing a Search and Creating a Logical Set

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Saving queries or sets for later use 	
<p>!</p> <ul style="list-style-type: none"> • Note: A logical set is dynamic. This means that the results may change when a condition either no longer applies or it now does apply. Most often, a set will change based on addition or deletion of items. 	<ol style="list-style-type: none"> 1. Log in to your Alma sandbox environment with a user from the document containing usernames and passwords that was provided to your institution. 2. Perform an <i>All titles-Keywords</i> search for the terms, technological innovations or another term or phrase of your choosing. When the results display, click on the Save Query button, located on the upper and lower right, to create a <i>Logical set</i>. 3. For the set name, enter <your initials> Titles related to technological innovation or according to the search that you performed. Enter the same thing in the description. Set content type: <i>All titles</i> Status: Active Private: No 4. Click on the Save button to save the query and view it in the Manage Sets list.

Creating a Logical Set, Another Way

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Creating a logical set 	
<p>!</p> <ul style="list-style-type: none"> • Note: In this example, we begin by creating the “container” first and populating it by performing a search. 	<ol style="list-style-type: none"> 1. Log in to your Alma sandbox environment with a user from the document containing usernames and passwords that was provided to your institution. 2. Open the Admin menu and select Manage Sets.

Returning Items at the Circulation Desk

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> Return items currently on loan using the Return Items workbench 	
<p>! Note: Configuration in Alma may be set to allow us to accept returns for items at another library. When this happens, the status of <i>Transit</i> is applied to the item until it is returned at its home location.</p>	<ol style="list-style-type: none"> Log in to your Alma sandbox environment with one of these users: <i>AlmaUser02</i>, <i>AlmaUser08</i> or <i>AlmaUser14</i>. Password is Us3rnAlma. Your Currently at location should be Graduate Library – Circulation. Go to the Return Items workbench, found under <i>Fulfillment – Checkout/Checkin</i>. Scan or enter the following barcodes to return these items and take note if there are any special instructions that appear: <ol style="list-style-type: none"> 13010582 (Graduate Library) 3279318 (Graduate Library) 15044914 (Main Library) 1513665 (Graduate Library) 12603027 (Main Library) 15087677 (Music Library) 1010786914 (Science Library) 1570835 (Graduate Library) 0052780 (Graduate Library) 57061478 (Science Library)
<p>! Note: Gives a sense of the workflow that occurs when an item is returned a different library than its home.</p>	<ol style="list-style-type: none"> Log in to your Alma sandbox environment with one of these users: <i>AlmaUser06</i>, <i>AlmaUser12</i> or <i>AlmaUser18</i>. Password is Us3rnAlma. Your Currently at location should be Science Library – Circulation. Go to the Scan In Items workbench, found under <i>Fulfillment – Resource Requests</i>. Scan or enter the barcodes to return these items at the home library and take note of the instructions that appear: <ol style="list-style-type: none"> 1010786914 (Science Library) 57061478 (Science Library)

<p>! Note: Gives a sense of the workflow that occurs when an item is returned a different library than its home.</p>	<p>7. Log in to your Alma sandbox environment with one of these users: <i>AlmaUser04</i>, <i>AlmaUser10</i> or <i>AlmaUser16</i>. Password is Us3rnA!ma. Your Currently at location should be Main Library – Circulation.</p> <p>8. Go to the Scan In Items workbench, found under <i>Fulfillment – Resource Requests</i>.</p> <p>9. Scan or enter the barcodes to return these items at the home library and take note of the instructions that appear:</p> <p style="padding-left: 40px;">a. 15044914 (Main Library) b. 12603027 (Main Library)</p>
<p>! Note: Gives a sense of the workflow that occurs when an item is returned a different library than its home.</p>	<p>10. Log in to your Alma sandbox environment with one of these users: <i>AlmaUser05</i>, <i>AlmaUser11</i> or <i>AlmaUser17</i>. Password is Us3rnA!ma. Your Currently at location should be Music Library – Circulation.</p> <p>11. Go to the Scan In Items workbench, found under <i>Fulfillment – Resource Requests</i>.</p> <p>12. Scan or enter the barcodes to return these items at the home library and take note of the instructions that appear:</p> <p style="padding-left: 40px;">a. 15087677 (Music Library)</p>

Managing Fines and Fees

Goals of this exercise:

- View any fines and fees owed
- Add new fee
- Pay, waive and dispute a fee

! **Note:** For some institutions, the **Pay** option may not be active as payment is handled outside of the library. This option is controlled by the circulation desk configuration.

1. Log in to your Alma sandbox environment with one of these users: *AlmaUser04*, *AlmaUser10* or *AlmaUser16*. Password is **Us3rnAlma**. Your **Currently at** location should be **Main Library – Circulation**.
2. Go to the *Manage Patron Services* workbench and retrieve the patron record for:
 - a. Pierre Bisailon (ID 174280)
 - b. Heather Francis (ID 3127160479)
 - c. Philip Wentworth (ID 8472602)
 - d. Caryn Kent (ID 100057)
3. Review the records to determine if users continue to have items on loan. You may have to change the *Loan Display* to **All Loans**.
4. To the right of the balance owing, there is a **Pay** button. Click on it to open a window allowing payment to be recorded. Identify which *Payment method* will be used. Change the *Payment amount* to a value less than the *User balance*. If you prefer, add a *Transaction ID* and *Comment*. Click on the **Send** button to complete the payment. Notice that the active balance has been affected appropriately.
5. To obtain more details about the fines/fees that any user owes, click on the **Active Balance** (\$75) itself. This takes us to the Patron Record to the **Fines/Fees** tab. Here we can see a breakdown of the fines and fees currently active on any user's record. Examine the details in the list.
6. Above the list is a filter for **Status**. Click on the **Active** filter and change it to **All**. Go through each of the statuses and see how the content of the list changes to show all fines and fees. When done, change the view back to showing only **Active**

	<p>transactions.</p> <ol style="list-style-type: none">7. On the right side, click on the Add Fine or Fee button. Add a new fee for <i>damaging an item</i>, click Add and Close to finish the action. Notice the addition to the list and the affect that this has on the Active Balance.8. Fines and Fees can be marked as Waived or Under dispute. Click on the <i>More actions</i> menu to the right of the new fee that you added and select Dispute. Confirm the dispute. Notice how this action changes the view and the balance as displayed in the summary section of the screen.9. Change your status filter to show In Dispute fees, click on the Actions button for your transaction in dispute and restore it. Again notice how this changes the display and the balance.10. Fines and fees can also be waived in this manner. You will find the Waive option adjacent to the Add Fine or Fee option. You may select the fines and fees to waive.11. Click on the Execute button to perform the Waive action on this fee. Note you may select a "Waiving Reason." Add a reason in the comment field and click Waive. The display and balance update to reflect this action.12. Click on the Save button to finish working on Fines and Fees for your patron and return to the <i>Patron Services Workbench</i>.13. Click on the Done button to conclude your session with this patron.
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Creating Requests on Behalf of Patrons for Items “On the Shelf”

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> To create a request for a Physical Item 	
<p>! Note: To create requests on behalf of patrons, an operator must have the Fulfillment Services Operator role.</p> <p>! Note: Patrons may place their own requests through discovery.</p> <p>! Note: Alma can be configured to allow (or not allow) requesting for materials that are on the shelf and available. Alma may be further configured to restrict the pick-up location to the library that owns the item.</p>	<ol style="list-style-type: none"> Log in to your Alma sandbox environment with one of these users: <i>AlmaUser04</i>, <i>AlmaUser10</i> or <i>AlmaUser16</i>. Password is Us3rnAlma. Your Currently at location should be Main Library – Circulation. Begin by performing a <i>Physical Items</i> search for any of the following titles, each of which is on the shelf: <ol style="list-style-type: none"> <i>Dripping dry</i>, by David N. Cassuto (Science Library) <i>The way we will be 50 years from today</i> by Mike Wallace (Law Library) <i>Sea power</i> by Admiral James Stavridis (Graduate Library) <i>Waterworld [videorecording]</i> (Main Library) <i>Bad singer</i> by Tim Falconer (Music Library) Click on the Request button, located at the far right. On the <i>Create Request</i> page, choose the Request Type of <i>Patron physical item request</i>. The page refreshes and displays new fields related to this request type. Search for or enter the requester as <i>Peter Parker</i> and choose a pickup location of <i>Main Library</i> from the dropdown. Select the Override On Shelf Request Policy button to override the configured fulfillment policy that determines where resources can be picked up. If desirable, add attributes to the request to apply certain criteria to the requested items by certain criteria. For now, though, click on the Submit button. You are returned to the list of results, notice the message at the top of the screen, request successfully submitted along with the request ID. Please make a note of this ID.

Creating Requests for Items on Loan to Other Patrons

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> To create a request for a Physical Item 	
<p>! Note: Patrons may place their own requests through discovery.</p> <p>! Note: Alma can be configured to allow (or not allow) requesting for materials that are on the shelf and available. Alma may be further configured to restrict the pick-up location to the library that owns the item.</p>	<ol style="list-style-type: none"> Log in to your Alma sandbox environment with one of these users: <i>AlmaUser04</i>, <i>AlmaUser10</i> or <i>AlmaUser16</i>. Password is Us3rnAlma. Your Currently at location should be Main Library – Circulation. Begin by performing a <i>Physical Items</i> search for any of the following titles, each of which is on loan to another patron: <ol style="list-style-type: none"> <i>The national dream ; The last spike</i>, by Pierre Burton (Graduate Library – on loan to Gudula Holzheid) <i>In coal country</i> by Judith Hendershot (Main Library – on loan to Marc Belle) <i>Real-time computing</i> by Duncan A. Mellichamp (Science Library – on loan to Kate Zhang) <i>The century of Bach and Mozart</i> by Sean Gallagher (Music Library – on loan to Sonja Vogelsang) <i>The economy of the earth</i> by Mark Sagoff (Law Library – on loan to Carolyn Sprague) Click on the Request button, located at the far right. On the <i>Create Request</i> page, choose the Request Type of <i>Patron physical item request</i>. The page refreshes and displays new fields related to this request type. Search for or enter the requester as Peter Parker and choose a pickup location of <i>Main Library</i> from the dropdown. Select the Override On Shelf Request Policy button to override the configured fulfillment policy that determines where resources can be picked up. If desirable, add attributes to the request to apply certain criteria to the requested items by certain criteria. For now, though, click on the Submit button.

	<ol style="list-style-type: none"> 6. You are returned to the list of results, notice the message at the top of the screen, request successfully submitted along with the request ID. Please make a note of this ID. 7. The patron who currently has the items on loan will receive email notification that the item now has a new due date because it has been recalled by another patron. 8. Go to any of the patrons named in #2 a – e to see the requests now displaying in their patron records.
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Process a Physical Item Request for an Item “On the Shelf”

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • To process the request for an available item sitting on the open shelves 	
<p>! Note: Your task list will show Requests waiting for pickup from the shelves.</p>	<ol style="list-style-type: none"> 1. Requests that have been placed for items that are on the shelves may be found in two ways: 1) in your task list if you are currently at the relevant circulation desk or 2) from the <i>Fulfillment</i> menu by choosing Pick From Shelf in the <i>Resource Requests</i> area. 2. Log in to your Alma sandbox environment with one of these users: <i>AlmaUser04</i>, <i>AlmaUser10</i> or <i>AlmaUser16</i>. Password is Us3rnA!ma. Your Currently at location should be Main Library – Circulation. 3. Open the Alma menu and choose to Pick From Shelf from the <i>Resource Requests</i> submenu. Here, you will see any requests that are waiting to be filled by items currently available and on the shelves. Notice the facets on the left for refining the list. 4. Click on the Print Slip Report button to obtain a complete list of all items awaiting pick-up in the Main Library. 5. For each individual request, there are numerous options available to manage the request, some of which are found under the <i>More actions</i> menu:

	<ol style="list-style-type: none">a. Cancel Requestb. Mark as Missingc. Print Slip (individually)d. Update Expirye. Convert to Resource Sharingf. Editg. View Title in Search <ol style="list-style-type: none">6. The number to the right of the <i>Requests</i> label is clickable and displays details about the request including the Requester and Barcode. Please make note of the barcode before clicking on the Back button to return to the <i>Pick Up</i> list.7. Assuming that we printed slips for the requests and that we have gone to the shelf to retrieve the items, we go to the Scan in Item workbench to fulfill the requests.8. Scan or enter the item barcode, previously noted in #6. If the item is from the Main Library, the next destination for the item is the Hold Shelf. This means that you can now place it on the hold shelf for collection. The requesting patron receives email notification that the item is ready to be picked up. If the pick-up location is a different library, the next destination for the item is that library and the item receives the status of <i>Transit</i>.9. Go to the Manage Patron Services workbench to retrieve Peter Parker's record. Notice the message that User has 1 item(s) waiting for pickup at this desk.10. Click on Request tab to see the request details. The Actions button gives the options to Edit or Cancel if necessary. Loan the item as you would normally do.
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Appendix A: Sample Users in Alma

Name	Primary Identifier
Geri Hernandez	200064
Mahesh Patel	200035
Patricia Moore	100078
Jack Scott	200019
Christopher Venckus	100122

Appendix B: Sample Titles and Barcodes

	Barcode	Library
Twelve yards by Ben Lyttleton	2051272304	Graduate Library
I only read it for the cartoons by Richard Gehr	2310512682	Graduate Library
A bold and hardy race of men by Jennifer Schell	2350113589	Graduate Library
The ordinary acrobat by Duncan Wall	2350104412	Graduate Library
Cooked by Michael Pollan	2604012449	Graduate Library
The idealist by Justin Peters	2530181479	Law Library
Roman law and the legal world of the Romans by Andrew M. Riggsby	1040211782	Law Library
The ordinary spaceman by Clayton C. Anderson	2103512701	Law Library
Evidence explained by Elizabeth Shown Mills	2315850707	Law Library
The invention of murder by Judith Flanders	2516659792	Law Library
Sapiens by Yuval Noah Harari	2501313759	Main Library
The billion dollar spy by David E. Hoffman	2315013651	Main Library
Shady characters by Keith Houston	2501312582	Main Library
Thank you for your service by David Finkel	2103512535	Main Library
Great mathematicians by Raymond Flood and Robin Wilson	2501011702	Main Library
How music got free by Stephen Witt	2103513623	Music Library
The great animal orchestra by Bernie Krause	2350151057	Music Library
Making the scene by Oscar Brockett, Margaret Mitchel and Linda Hardberger	2531020918	Music Library
Listen to this by Alex Ross	2310572302	Music Library
The Ninth by Harvey Sachs	2015734197	Music Library
Imperial dreams by Tim Gallagher	2501302251	Science Library
How to make a spaceship	2350113611	Science Library
The end of memory by Jay Ingram	2015312692	Science Library
Animals as neighbors by Terry O'Connor	2530113615	Science Library
Birdmen by Lawrence Goldstone	2013552156	Science Library