



Creating Sets and Running Jobs

Sub-title here

Presenter name

What is a Set?



- A set is a collection of records, such as users or the results of a repository search.
- There are two kinds of sets:
 - **Itemized** – Individual records, selected or uploaded by the user.
 - Set is *static* – members can be added or removed manually.
 - **Logical** – A saved search query, which is run every time the set is referenced.
 - Set content is *dynamic* – results reflect information currently in the repository.

Types of Sets

Resource Management sets

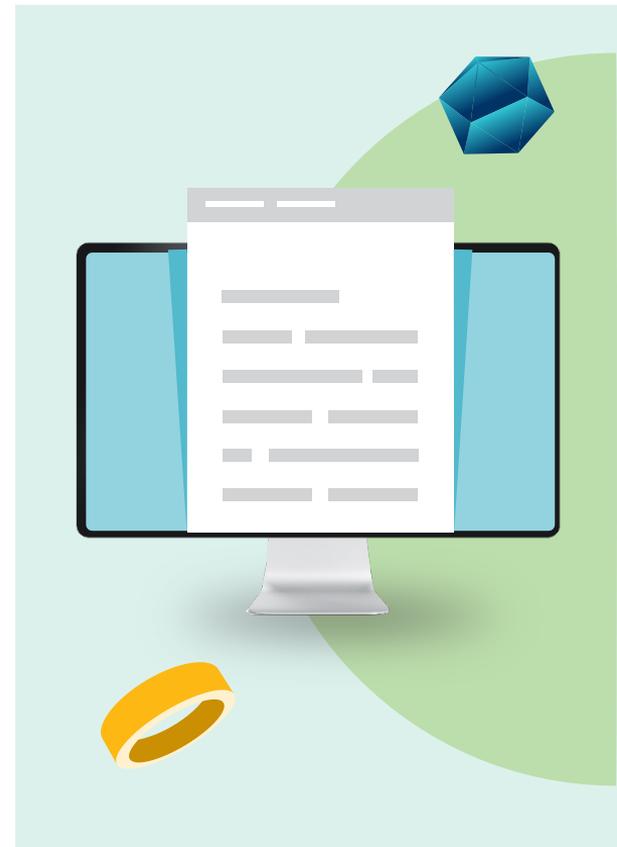
- Titles, Authorities, Collections
- Digital/Electronic/Physical resources

Acquisition sets

- PO Lines, or Vendors

User sets

Reading List Sets





User Roles

For **Resource Management** content type sets, one of the following roles is required:

Cataloger

Catalog Manager

Catalog Administrator

Electronic/Digital Inventory Operator

Repository Manager

Requests Operator

Note: A General System Administrator, Fulfillment Administrator, or Requests Operator can create an itemized physical items set related to a loan status on the Manage Fulfillment Sets page

For **Acquisition** content type sets, one of the following roles is required:

Purchase Operator (PO line set only)

Purchase Manager (PO line set only)

Vendor Manager (Vendor set only)

Acquisitions Administrator

General System Administrator

For **User** sets, one of the following roles is required:

User Manager

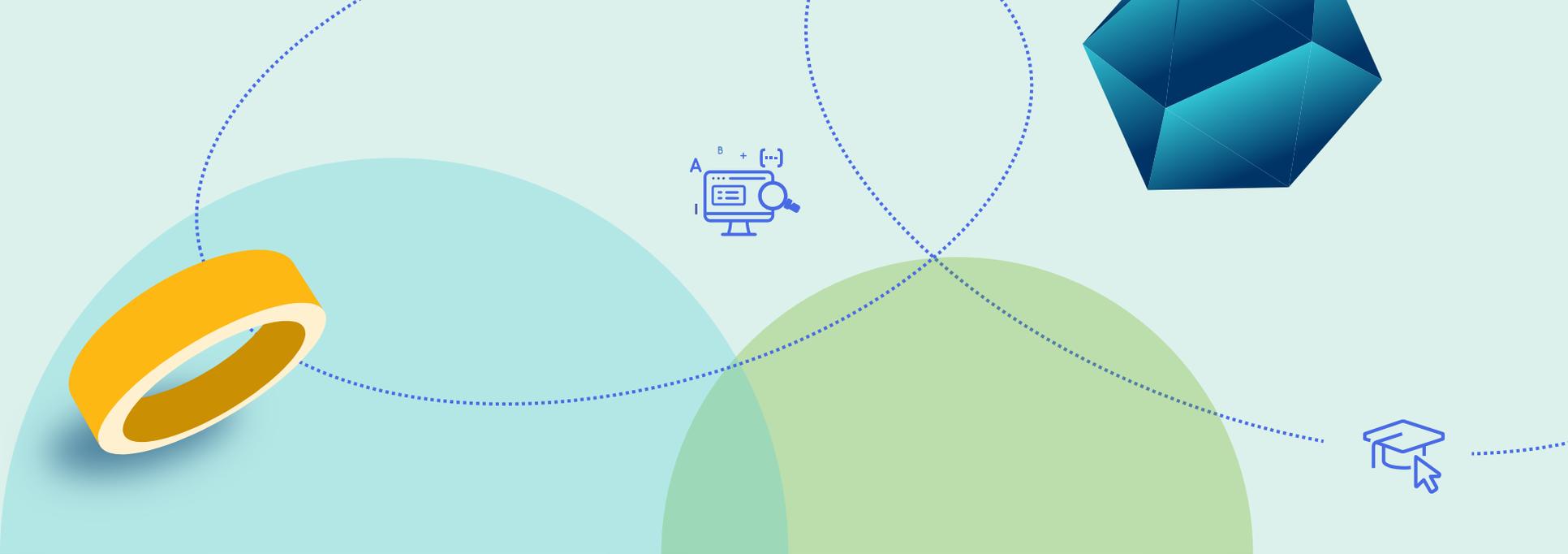
User Administrator

For **Reading List** sets, one of the following roles is required:

Course Reserves Operator/Manager

Fulfillment Services Operator/Manager

To remove records from sets created by others, you must have the Repository Manager role.

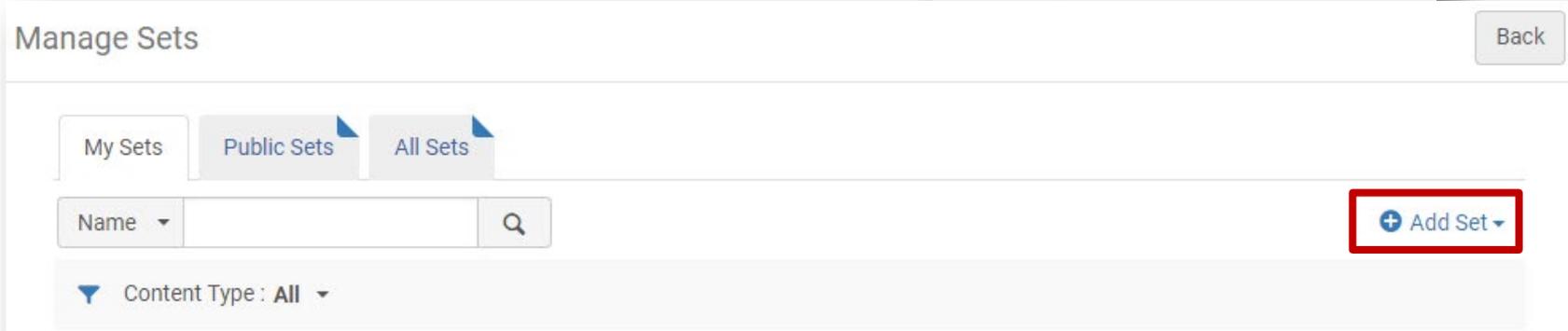
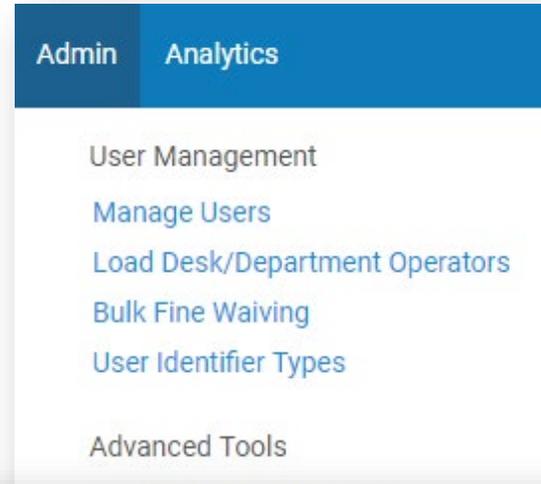


Creating and Managing Sets

Create a Set

One way to create a set is from the Admin menu.

Admin → Manage Jobs and Sets →
Manage Sets



Create a Set

The screenshot shows the 'Set Details' form with a dropdown menu open for the 'Set content type' field. A red box highlights the dropdown menu, and a red arrow points from the dropdown to the 'Set content type' field. The dropdown menu lists various content types, including 'All Titles', 'Authorities', 'Collections', 'Digital files', 'Digital titles', 'Electronic collections', 'Electronic portfolios', 'Electronic titles', 'PO line', 'Physical items', 'Physical titles', 'Reading lists', 'User', and 'Vendor'. The 'Set content type' field is currently set to 'All Titles'. The form also includes fields for 'Set name', 'Description', and 'Note', and a 'Private' checkbox with 'Yes' selected. The creation date is '02/18/2019 13:02:00 CST' and the updated by is 'Ex Libris'.

Set Details

General Information

Set name *

Description

Note

Set content type * **All Titles**

Private Yes No

Creation date **02/18/2019 13:02:00 CST**

Updated by **Ex Libris**

Set ID -

Look-up or select

- All Titles
- Authorities
- Collections
- Digital files
- Digital titles
- Electronic collections
- Electronic portfolios
- Electronic titles
- PO line
- Physical items
- Physical titles
- Reading lists
- User
- Vendor

Cancel Next

Create a Set—Logical

Sets can be set to private or public

Sets can have a status of Active or Inactive

Set Details

1 2 Cancel Next

General Information

Set name *

Description

Note

Set content type * All Titles

Set type Logical

Private Yes No

Status Active Inactive

Creation date 02/18/2019 13:02:00 CST

Created by Ex Libris

Updated by Ex Libris

Content Origin Institution only Discovery

Set ID -

Create a Set—Logical

Ex All Titles (1 - 13 of 13) | grand canyon

Cancel Back **Save**

Sort by : Rank Secondary Sort by : Rank Expand

1  **The Grand Canyon**, by Robert Wallace and the editors of Time-Life Books. With photos. by Ernst Haas.

Book {Book - Physical} By Wallace, Robert, (New York, Time-Life Books [1972])

Subject: Grand Canyon (Ariz.)

Series: The American wilderness

Language: English

Record number: 71179463 //r82

Update Date: 07/08/2016

● Physical (1) Electronic Digital Other details

Edit Record Add Reminder ... Back

Create a Set—Logical

Set is available on the My Sets Tab

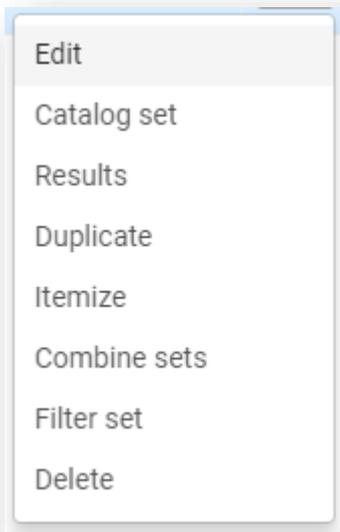
The Actions menu options differ based on the type of set

The screenshot shows the 'Manage Sets' interface. At the top, there are three tabs: 'My Sets' (highlighted with a red box), 'Public Sets', and 'All Sets'. Below the tabs is a search bar with '1 - 1 of 1' results and a search icon. A filter dropdown shows 'Content Type : All'. Below this is a table with columns: 'Active', 'Name', 'Type', and 'Content Type'. The table contains one row with the name 'grand canyon' and 'Logical' type. To the right of the table, an actions menu is open, listing options: 'Edit', 'Catalog set', 'Results', 'Duplicate', 'Itemize', 'Combine sets', 'Filter set', and 'Delete'. A red arrow points from the '...' menu icon in the table row to the actions menu. The 'My Sets' tab and the actions menu are also highlighted with red boxes.

Active	Name	Type	Content Type
1 <input checked="" type="checkbox"/>	grand canyon	Logical	All Titles

- Edit
- Catalog set
- Results
- Duplicate
- Itemize
- Combine sets
- Filter set
- Delete

Actions Menu Options—Logical Set of Metadata Records



Action	Description
Edid	Modify set parameters
Catalog set	Opens the records in the MD Editor
Results	Run the search query and display the results
Duplicate	Copy the set
Itemize	Convert a set from logical to itemized
Combine sets	Create a new set based on the members of two existing sets
Filter set	Allow indication rules to be applied to the set
Delete	Delete a set

Create a Set—Logical

< Set Details

Cancel

Save

General Information



Set name *

Description

Note

Set content type **All Titles**

Private Yes No

Creation date **02/18/2019 13:40:28 CST**

Updated by **Ex Libris**

Set ID -

Set type **Logical**

Status Active Inactive

Created by **Ex Libris**

Content Origin **Institution only**

Create a Set—Itemized

Admin Analytics

User Management

Manage Sets

Back

My Sets Public Sets All Sets

1 - 2 of 2 Name

Content Type : All

+ Add Set

- Logical
- Itemized

Active	Name	Type	Content Type	Content Origin	Creation Date	
1 <input checked="" type="checkbox"/>	grand canyon	Logical	All Titles	Institution only	02/18/2019 13:02:00 CST	...

Create a Set—Itemized

< Set Details

General Information ▼

Set name * 

Description

Note

Set content type * **All Titles** ▼

Set type **Itemized**

Private Yes No

Status Active Inactive

Creation date **02/18/2019 14:23:38 CST**

Created by **Ex Libris**

Updated by **Ex Libris**

Content Origin Institution only Discovery

Set ID -

Add Contents from File to Set ▼

From File From Analytics

File  The maximum file size is 10 MB.

Create a Set—Itemized

Set Details **Add Members to Set** Cancel Save

General Information

Set name * 

Description

Note

Set content type * 

Set type **Itemized**

Private Yes No

Status Active Inactive

Creation date **02/18/2019 15:44:06 CST**

Created by **Ex Libris**

Updated by **Ex Libris**

Content Origin Institution only Discovery

Set ID -

Create a Set—Itemized

< Physical Items (1 - 20 of 41)
where (Base status equals "Item not in place" AND Library (Holdings) equals (Science Library))

Sort by: Rank Secondary Sort by: Rank

Select All Process Type: Missing

1  **A Dictionary of scientific terms; the foundations of science reference book.** [Display in Discovery](#)
Book (London, S Low Marston distributed in the USA by Ginn Boston [1966]) **Call Number:** Q123 .D54
Barcode: - **Call Number Type:** Library of Congress classification
Update Date: 07/08/2016 **Status:** Item not in place
Library: Science Library **Due back:** -
Process type: Missing **Material Type:** Book
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Science Reference
[Other details](#)

2  **A history of the sciences.** [Display in Discovery](#)
Book By Mason, Stephen Finney, (New York, Collier Books [1962]) **Call Number:** Q125 .M36 1962
Barcode: - **Call Number Type:** Library of Congress classification
Update Date: 07/08/2016 **Status:** Item not in place
Library: Science Library **Due back:** -
Process type: Missing **Type:** Book
Expected Arrival Time: -

< 1 of 3 >

Done
Add Selected

Create a Set—Itemized

Manage Sets Back

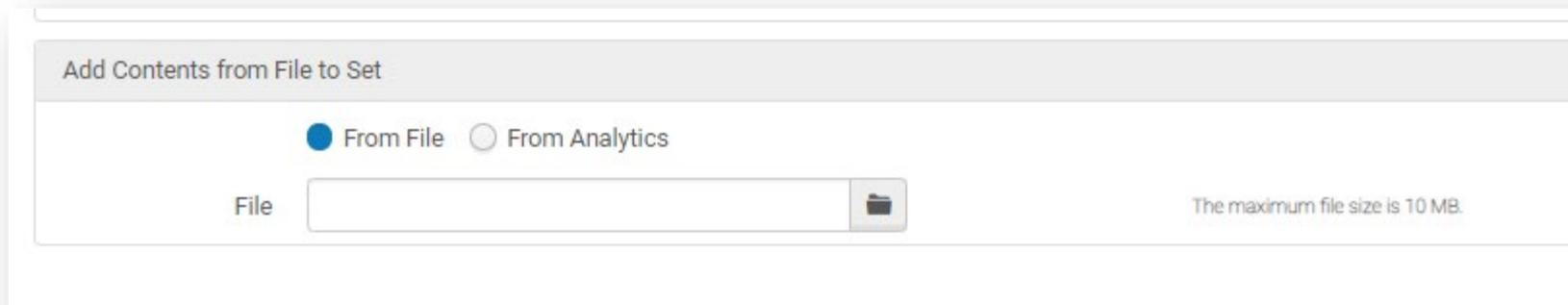
My Sets Public Sets All Sets

1 - 3 of 3 Name + Add Set

Content Type : All

Active	Name	Type	Content Type	Content Origin	Creation Date	
<input checked="" type="checkbox"/>	grand canyon	Logical	All Titles	Institution only	02/18/2019 13:02:00 CST	<input type="button" value="..."/>
<input checked="" type="checkbox"/>	Quilts	Logical	All Titles	Institution only	02/18/2019 13:40:28 CST	<input type="button" value="..."/>
<input checked="" type="checkbox"/>	Items missing from the Science Library	Itemized	Physical items	Institution only	02/18/2019 15:44:06 CST	<input type="button" value="..."/>

Create a Set—Itemized



Add Contents from File to Set

From File From Analytics

File 

The maximum file size is 10 MB.

- The imported file must be a text file (.txt or .csv) or Excel file (.xls or .xlsx) and have the correct header at the top of the column for the data to be read
- If the Excel file has more than one column, it utilizes the first column of data that has a valid header type
- All other information in the file is disregarded
- Once the file is selected click Save—Add Members to Set has no functionality in this workflow

Create a Set—Itemized

- Consult the Customer Knowledge Center for information about Content Types and their acceptable headers

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets#Creating_Itemized_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets#Creating_Itemized_Sets)

- A video of creating an itemized set by uploading a list of identifiers is available for you to view

<https://www.youtube.com/watch?v=MVhRtCyTCs0&feature=youtu.be>



Create a Set—Itemized

< Set Details Add Members to Set Cancel **Save**

General Information

Set name *

Description

Note

Set content type *

Private Yes No Status Active Inactive

Creation date **02/18/2019 17:15:45 CST** Created by **Ex Libris**

Updated by **Ex Libris** Content Origin Institution only Discovery

Set ID -

Add Contents from File to Set

From File From Analytics

Analytic Folder [Download report](#)

Create a Set—Itemized

 Set "Recalled Items" was successfully saved. A job was submitted to add members to the set.



 Add Set  

Admin **Analytics**

- User Management
 - Manage Users
 - Load Desk/Department Operators
 - Bulk Fine Waiving
 - User Identifier Types
- Advanced Tools

Monitor Jobs

Back

Scheduled

Running

History

1 - 1 of 1

Job details



Refresh



Job Category: All

Name	Job Category	Creator	Submit Date	Start Date	Progress	Status
1 Add Members to Set	Repository	jenny.draeger 	02/18/2019 17:12:16 CST	02/18/2019 17:12:25 CST	N/A	Running

Create a Set—Itemized

Manage Sets Back

My Sets Public Sets All Sets

1 - 4 of 4 Name

Content Type : All

Active	Name	Type	Content Type	Content	Created	...
<input checked="" type="checkbox"/>	grand canyon	Logical	All Titles	Institution	02/18/2019 15:40:28 CST	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Quilts	Logical	All Titles	Institution only	02/18/2019 15:40:28 CST	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Items missing from the Science Library	Itemized	Physical items	Institution only	02/18/2019 15:44:06 CST	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Recalled Items	Itemized	Physical items	Institution only	02/18/2019 16:19:08 CST	<input type="checkbox"/>

Context menu for the 'Recalled Items' set:

- Edit
- Members
- Duplicate
- Combine sets
- Create titles set
- Delete

Create a Set—Itemized

Physical items ▾ Keywords ▾ Home Search Advanced ▾

Physical Items (1 - 20 of 1,658) **Set name** [Recalled Items](#) **Set type** [itemized](#) Remove Selected Back Done

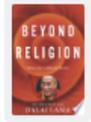
Select All + Add Members Share Settings

1  **The natural world of Winnie-the-Pooh : a walk through the forest that inspired the Hundred Acre Wood / Kathryn Aalto.** Remove Edit Item ...

Book By Aalto, Kathryn, (Portland, Oregon : Timber Press, 2015.)
Barcode: 2510312766
Update Date: 07/08/2016
Library: Main Library
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Stacks
[Other details](#)

Call Number: DA670.A73 A25 2015
Call Number Type: Library of Congress classification
Status: Item in place
Due back: -
Material Type: Book

Orders: 1

2  **Beyond religion : ethics for a whole world / His Holiness the Dalai Lama.** Remove Edit Item ...

Book By Bstan-'dzin-rgya-mtsho, (Boston : Houghton Mifflin Harcourt ©2011.)
Barcode: 2013512770
Update Date: 07/08/2016

Call Number: BJ1012 .B739 2011
Call Number Type: Library of Congress classification
Status: Item in place

Orders: 1



Fulfillment Sets

Fulfillment Sets

The screenshot displays the 'Manage Fulfillment Sets' interface. At the top, a blue navigation bar contains 'Fulfillment', 'Admin', and 'Analytics'. Below this, a grey bar features three buttons: 'View My Sets' (highlighted with a red box), 'Cancel', and 'Save' (also highlighted with a red box). The main form area includes fields for 'Name *', 'Description *', and 'Note'. A 'Loan status' dropdown menu is set to 'Any'. Below these are date selection fields for 'Due date after', 'Due date before', 'Status date after', and 'Status date before', each with a calendar icon. A success message box at the top right states 'The set has been added successfully.' with an information icon and a close button. At the bottom, a white box contains links for 'Course Reserves', 'Courses', 'Resend Printouts/Emails', and 'Citation Alternate Suggestions'.



Running Jobs

Types of Jobs

Scheduled Jobs

- Run periodically
- Scheduled by Alma or by the predefined job scheduling options

Workflow Jobs

- Run automatically when required
- May be rerun if original job failed

Manual Jobs

- Available to run as required
- Run on defined sets of records





User Roles

Acquisitions Administrator

Catalog Administrator

Catalog Manager

Digital Inventory Operator

Digital Inventory Operator Extended

Fulfillment Administrator

General System Administrator

Purchasing Manager

Purchasing Operator

Repository Administrator

Repository Manager

Repository Operator

Requests Operator

User Administrator

User Manager

Only the jobs that you can run appear to you on the Run a Job page.



Running Jobs

- Jobs *permanently* change data in your Alma environment.
- The list of jobs can be found in the Knowledge Center

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets#Manual_Jobs_and_Their_Relevant_Parameters](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets#Manual_Jobs_and_Their_Relevant_Parameters)

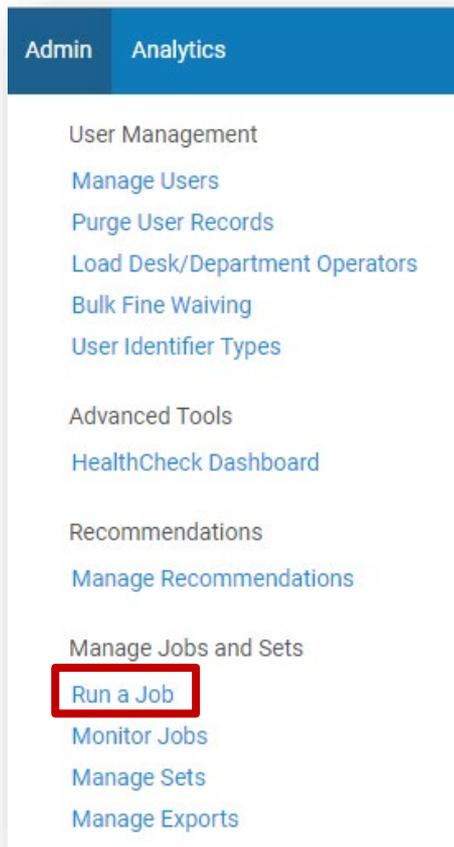
With great power comes great responsibility.
Test in sandbox. Test in production.

Restoring Records Removed or Changed by Jobs

- Withdraw items
- Delete portfolios
- Delete bibliographic records
- KORMARC/MARC 21/UNIMARC normalization
- Change holdings information
- Authorities-preferred term correction

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets#Restoring_Records_Removed_or_Changed_by_Jobs](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets#Restoring_Records_Removed_or_Changed_by_Jobs)

Run a Job



The screenshot shows a software interface with a blue header bar containing two tabs: 'Admin' and 'Analytics'. Below the header is a white menu area with several categories and sub-items. The 'Run a Job' item is highlighted with a red rectangular box.

- Admin
- Analytics
 - User Management
 - Manage Users
 - Purge User Records
 - Load Desk/Department Operators
 - Bulk Fine Waiving
 - User Identifier Types
 - Advanced Tools
 - HealthCheck Dashboard
 - Recommendations
 - Manage Recommendations
 - Manage Jobs and Sets
 - Run a Job**
 - Monitor Jobs
 - Manage Sets
 - Manage Exports

Run a Job

- Search for job by description or name
- Limit list of jobs by type
- Reorder list of jobs by sorting on column headers

Run a Job - Select Job to Run

1 - 20 of 72

Description

Type: All Source type: All

	Name	Description	Content Type	Type
1	Withdraw items	Withdraw physical items task.	Physical item	Withdraw
2	Withdraw digital representations	Withdraw digital representations task.	Digital title	Withdraw
3	Update PO Lines Workflow	Update PO Lines Workflow for PO Line set	Purchase order line	Update PO lines
4	Update PO Lines transactions	Update PO Lines transactions for PO Line set	Purchase order line	Update PO lines
5	Update PO Lines Information - Advanced	Update PO Lines Information - Advanced	Purchase order line	Update PO lines

Running a Job

Run a Job - Select Job to Run

1

?

Cancel

Next

1 - 7 of 7

Description ▾

export



Type: All ▾ Source type: All ▾

	▼ Name	↕ Description	Content Type	↕ Type
1	<input type="radio"/> Export URLs	Export URLs of bibliographic records / electronic resources / digital titles	Versatile	Export
2	<input type="radio"/> Export Physical Items Labels	Export physical items labels for printing	Physical item	Export
3	<input type="radio"/> Export Physical Items	Export Physical Items	Physical item	Export
4	<input type="radio"/> Export Electronic Portfolios	Export active electronic portfolios information	Portfolio	Export
5	<input type="radio"/> Export Digital Titles	Export Digital Records	Digital title	Export
6	<input checked="" type="radio"/> Export Bibliographic Records	Export set of Bibliographic Records	Bibliographic title	Export
7	<input type="radio"/> Export Authority records	Export set of local authority records	Authority MMS	Export

Running a Job

Run a Job - Select Set

1 2 3 4 Cancel Back **Next**

21 - 30 of 30 Name [] [Q]

Content Type : All

Name	Type	Content Type	Content Origin	Create Date
<input type="radio"/> test OCLC set	Itemized	All Titles	Institution only	08/20/2018 11:34:50 CDT
<input type="radio"/> test set for indication rules	Itemized	All Titles	Institution only	03/01/2016 06:30:45 CST
<input type="radio"/> test set for indication rules - filtered - 03/01/2016 06:32:33 CST	Itemized	All Titles	Institution only	03/01/2016 06:32:41 CST
<input type="radio"/> Titles to order/add	Itemized	All Titles	Institution only	01/31/2018 14:59:30 CST
<input type="radio"/> to_delete	Logical	All Titles	Institution only	07/13/2018 09:23:49 CDT
<input type="radio"/> Total records imported_2018/05/28 24:51:20 CDT	Itemized	All Titles	Institution only	05/28/2018 24:51:28 CDT
<input type="radio"/> UNIMARC	Logical	All Titles	Institution only	10/25/2015 03:41:46 CDT
<input type="radio"/> UNIMARC - itemized - 10/25/2015 06:17:58 CDT	Itemized	All Titles	Institution only	10/25/2015 06:18:09 CDT
<input checked="" type="radio"/> Video Format	Logical	Physical titles	Institution only	07/20/2016 09:16:01 CDT
<input type="radio"/> world music	Logical	Digital titles	Institution only	01/22/2018 12:31:46 CST

Running a Job

< Run a Job - Enter Task Parameters



Cancel

Back

Next

Task Parameters: Export Bibliographic Records



Physical format	<input type="text" value="XML"/>
Output format	<input type="text" value="MARC21 Bibliographic"/>
Number of records in file	<input type="text" value="One File"/>
Expand routine	<input type="text"/>
Export into folder	<input type="text" value="Private"/>
FTP configuration	<input type="text"/>
Sub-directory (Path relative to ftp configuration)	<input type="text"/>

Running a Job

Run a Job - Review and Confirm

1 2 3 4 Cancel Back **Submit**

General Information

Job Name **Export Bibliographic Records - Video Format - 03/19/2019 12:07:29 CDT**

Set Information

Set ID **907723360000521**

Name **Video Format**

Set Size **1**

Task Parameters: Export Bibliographic Records

Physical format **XML**

Output format **MARC21 Bibliographic**

Number of records in file **One File**

Expand routine

Export into folder **Private**

FTP configuration -

Sub-directory (Path relative to ftp configuration) -



Monitor Jobs

Monitor Jobs

Admin Analytics   

- User Management
 - Manage Users
 - Purge User Records
 - Load Desk/Department Operators
 - Bulk Fine Waiving
 - User Identifier Types
- Advanced Tools
 - HealthCheck Dashboard
- Recommendations
 - Manage Recommendations
- Manage Jobs and Sets
 - Run a Job
 - ★ Monitor Jobs**
 - Manage Sets
 - Manage Exports

Monitor Jobs

Scheduled Running History

Job details 

 Job Category : All 

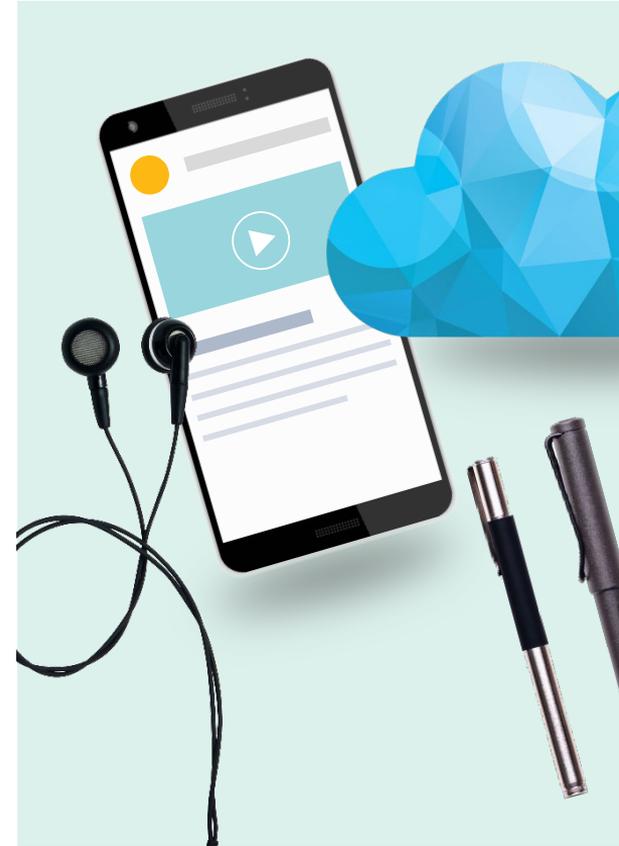


Conclusion

Overview

- Types of Sets
 - Logical
 - Itemized
 - Fulfillment
- Creating and Managing Sets
- Running Jobs
- Monitoring Jobs

Questions?





Thank you!

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