



Working with Sets and Jobs

Session Objectives

- Session Description:
 - Learn how to run manual jobs on defined sets.
- Session Objective(s)
 - By the end of this session you will know, understand and/or be able to:
 - Create and manage sets
 - Differentiate between logical and itemized sets
 - Run jobs using sets
 - Monitor jobs

Agenda

- 1** About Sets and 'Manual' Jobs
- 2** Creating and Managing Sets
- 3** Running Jobs
- 4** Monitoring Jobs
- 5** Next Steps, Support Resources and Feedback

About Sets and 'Manual' Jobs

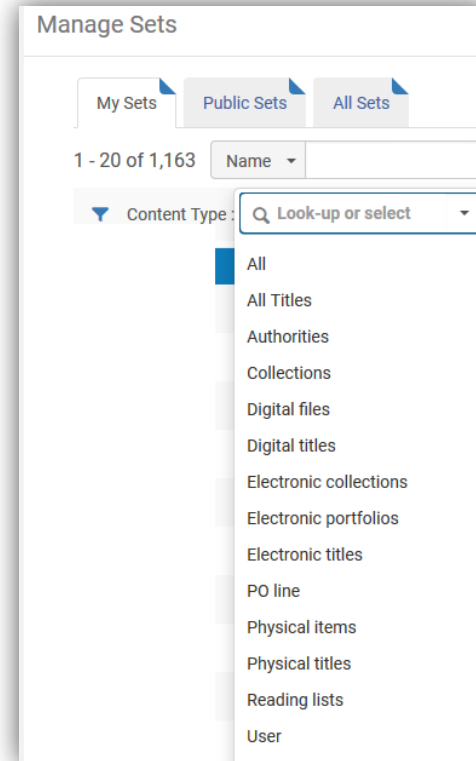


What is a Set?

- A set is a collection of items, such as users or the results of a repository search.
- There are two kinds of sets:
 - **Itemized** – Individual items, 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.

Set Content Types

- Content type for sets:
 - Resource Management sets
 - Titles, Authorities, Collections,
 - Digital/Electronic/Physical resources.
 - Acquisition sets
 - PO Lines, or Vendors.
 - User sets
 - Reading List Sets.



How is a Set Used by a Job?

- Sets may be used to manage data in various ways such as:
 - Bibliographic data fix/change...
 - Republish to Primo, OCLC, resource sharing systems...
 - Move items, change item information, withdraw/delete...
 - Update PO Lines...
 - Update or Notify Users (send Social Login invitation)...
 - Manage lost loans...
 - Modify PO Lines
 - Much, much more...



User Roles

- Roles required to create sets depend on the content type of the set. Please consult the Online Help:
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets)

PERMISSIONS: The roles required to manage search queries and sets depends on the content type of the set you are managing:

- 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; see below.
- For Acquisition content type sets, one of the following roles is required:
 - Purchase Operator/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

Creating and Managing Sets



Create a Set

Admin Analytics

Manage Jobs and Sets

- ★ Run a Job
- ★ Monitor Jobs
- ★ Manage Sets
- Manage Exports

Manage Sets

My Sets Public Sets All Sets

1 - 20 of 854 Name

Content Type: All

Active	Name	Type	Content Type	Content Origin	Creation Date	
<input checked="" type="checkbox"/>	wrh031117	Logical	Electronic portfolios	Institution only	03/11/2017 11.45.33 IST	<input type="button" value="..."/>
<input checked="" type="checkbox"/>	wom	Logical	All Titles	Institution only	07/09/2017 18.4	Edit
<input checked="" type="checkbox"/>	Without 917	Logical	All Titles	Institution only	30/06/2017 19.3	Results
<input checked="" type="checkbox"/>	Withdraw item with POL - itemized - 21/02/2018 08.37.58 CST	Itemized	Physical titles	Institution only	21/02/2017 18.4	Duplicate
<input checked="" type="checkbox"/>	Withdraw item with POL	Logical	Physical titles	Institution only	21/02/2015 22.2	Itemize
<input checked="" type="checkbox"/>	Withdraw items with POL - itemized - 21/02/2018 08.33.19 CST	Itemized	All Titles	Institution only	21/02/2016 01.1	Combine sets
						Delete

Add Set - Logical

Set Details 1 2 Cancel Next

General Information

Set name *

Description

Note

Set content type *

Private Yes No

Creation date 18/03/2018 21.56.49 IST

Updated by Ex Libris

Set ID -

Set type Logical

Status Active Inactive

Created by Ex Libris

Content Origin Institution only Discovery



The set name may not contain special characters (for example: &, #, \$, %).

Advanced

Repository Search

- All Titles Keywords contains 991122770000541
- All Titles Keywords contains 99432041500561
- Physical Titles Keywords contains madonna
- Physical Items Barcode contains wrh180302
- Physical Items PO Line contains wrh180302
- Physical Titles Tout contient animals
- Physical Titles Palabras clave contiene animals
- Physical Titles Stichwörter Enthält animals
- Physical Items PO Line contains TRI-44663
- Physical Items Keywords contains 99427140900561


1 2 Back

Add Set – Logical

All titles ▾ Keywords ▾ grand canyon Home ▾ Search Advanced ▾


All Titles (1 - 20 of 126) | grand canyon Cancel **Save**

Sort by: Publication Date - Asc ▾ Secondary Sort by: Rank ▾ Expand: Electronic ▾ × Share Settings

1  **101 Grand Canyon Tips** Edit Record Add Reminder ...

Book (Book - Physical) (LifeTipscom Inc)

Language: English
ISBN: 1-60275-030-0
Record number: (CKB)341000000004211
Update Date: 08/08/2015

 Physical Electronic (1) Digital [Other details](#)

1 Portfolio | 1 of 1 portfolios are available

Interface Name	Collection Name	Service Type	Availability
----------------	-----------------	--------------	--------------

 Set "Logical Set" has been successfully saved.

Add Logical Set – “Save Query”, from Search

The screenshot displays the Alma library system interface. At the top, the navigation bar includes the Alma logo, a star icon, and menu items: Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The current page is identified as "Main Library - Acquisitions".

The main search area is titled "Physical titles" and includes a "Zone" selector with "Institution" selected. The search criteria are defined as follows:

- Material Type: Book
- Operator: AND
- Permanent physical location: Health Sciences Library
- Operator: OR
- Permanent physical location: Health Sciences Reference

Buttons for "Clear form" and "Search" are visible. Below the search criteria, the query is summarized: "Physical Titles (1 - 1 of 1) where (Material Type equals "BK" AND Permanent physical location equals ((Health Sciences Library : Health Sciences Reference)))". A "Save Query" button is highlighted in a purple box.

The left sidebar shows "Facets" for Material Type (Book - 1), Resource Type (Book - Physical - 1), Language (English - 1), and Publication Year (2013 - 1).

The search results show one item:

- 1. **El baile de la victoria** (Book) by Skármeta, Antonio (Santiago de Chile Planeta 2003). Language: English. Update Date: 14/01/2015.

Buttons for "Edit Record" and "Holdings" are present for the result. A "Physical (2)" indicator is shown below the result.

Logical Set – View Results (Modify Search Terms and Save)

The screenshot displays the 'Manage Sets' interface. At the top, there are tabs for 'My Sets', 'Public Sets', and 'All Sets'. Below this is a search bar with 'Name' selected and 'logical set' entered. A '1 - 6 of 6' indicator is on the left, and '+ Add Set', a share icon, and a settings icon are on the right. A dropdown menu shows 'Content Type: All'. Below this is a table with columns: Active, Name, Type, Content Type, Content Origin, and Creation Date. The first row is highlighted in yellow and shows a toggle switch, the name 'Logical Set', Type 'Logical', Content Type 'All Titles', Content Origin 'Institution only', and Creation Date '18/03/2018 21.56.49 IST'. A three-dot menu is visible to the right of this row. A context menu is open over this menu, listing options: Edit, Catalog set, Results (highlighted with a purple box), Duplicate, Itemize, Combine sets, and Filter set. In the foreground, a search modal is open. It has a dropdown for 'All titles', a 'Zone' section with 'Institution' selected, and a search query 'grand canyon' in a text box. Below the search box are 'Clear form' and 'Search' buttons. Below the modal, the search results are shown: 'All Titles (1 - 20 of 126)'. The results are filtered by 'Institution' and 'Community'. The first result is '101 Grand Canyon Tips', a book by LifeTipscom Inc. Metadata includes Language: English, ISBN: 1-60275-030-0, Record number: (CKB)3410000000004211, and Update Date: 08/08/2015. There are buttons for 'Edit Record' and 'Portfolio List' next to the result.

Active	Name	Type	Content Type	Content Origin	Creation Date
<input checked="" type="checkbox"/>	Logical Set	Logical	All Titles	Institution only	18/03/2018 21.56.49 IST

Search Query: grand canyon

Results: 101 Grand Canyon Tips

Book (Book - Physical) (LifeTipscom Inc)

Language: English
ISBN: 1-60275-030-0
Record number: (CKB)3410000000004211
Update Date: 08/08/2015

Add Set - Itemized

Set Details

General Information

Set name *

Description

Note

Set content type *

Private Yes No

Creation date 18/03/2018 22.10.42 IST

Updated by Ex Libris

Set ID -

Set type **Itemized**

Status Active Inactive

Created by Ex Libris

Content Origin Institution only Discovery

Add Contents from File to Set

File

The maximum file size is 10 MB.

	A	B
1	USERNAME	
2	gdepartieu	
3	yaala.ariel-joel	
4	hanshenning.altenburg	

- Can “Add Members to Set”, or use an input file.

Add Set – Itemized, Input File

- Use a **text** file (.txt or .csv) or **Excel** file (.xls or .xlsx).
- Have correct **header**. Consult the Online Help: [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets)
- Only the first column (which has valid header) – is read.

Content Type	Header
Note When you use the 035 field option in a file (see below), the matching process to build your itemized set is similar to the matching method used in an advanced search with the Other System Number parameter. See Other System Number for more information.	
All Titles	MMS ID ISSN ISBN OCLC number 035 field

User	Barcode User name Institution ID Facebook Google Twitter
------	---

Add Set – Itemized, Load and Save

< Set Details Add Members to Set Cancel Save

Alt + S

General Information

Set name *

Description

Note

Set content type *

Private Yes No

Creation date 18/03/2018 22.28.45 IST

Updated by Ex Libris

Set ID -

Set type **Itemized**


Status Active Inactive

Created by **Ex Libris**

Content Origin Institution only Discovery

Add Contents from File to Set

File

 (8.65 KB)

The maximum file size is 10 MB.

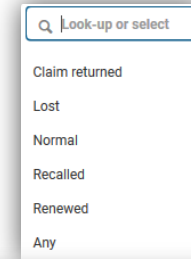
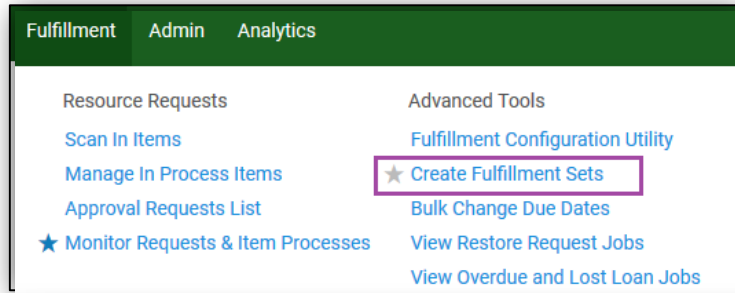
Itemized Set – View Members

The screenshot displays the 'Manage Sets' interface. At the top, there are tabs for 'My Sets', 'Public Sets', and 'All Sets'. Below this is a search bar with 'Name' selected and 'itemized users' entered. A 'Content Type' dropdown is set to 'All'. A table lists one set: 'Itemized Users 1' with a toggle switch, type 'Itemized', content type 'User', origin 'Institution only', and creation date '18/03/2018 22:28:45 IST'. A menu is open over the table, showing options: Edit, Members (highlighted), Duplicate, Combine sets, and Delete. Below this is a 'Find and Manage Users' window for 'Itemized Users 1'. It shows 'Set type' as 'itemized' and 'Set content type' as 'User'. There are tabs for 'Staff', 'Public', 'Contact', and 'All'. A search bar is present. Below the search bar are filters for 'Account', 'Role', and 'Status', all set to 'All'. A table lists 3 members:

	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
1	<input type="checkbox"/> Hans-Henning Attenburg	Internal	Public	General Administrator	FAC	Active	31/12/2016		✓
2	<input type="checkbox"/> d'Yaala Ariel-Joel	Internal	Staff	General Administrator	Staff	Active	31/12/2016		✓
3	<input type="checkbox"/> Gerard Depardieu	Internal	Public	Cataloger	Carrel	Active	02/01/2021		

Note about Fulfillment Sets

- Fulfillment Sets -
- Created from: Fulfillment – Advanced Tools



Manage Fulfillment Sets View My Sets Cancel Save

Name *

Description *

Note

Loan status **Recalled**

Due date after

Due date before

Status date after

Status date before

May 2018 Create Set from Analytics!



ELUNA 2018

May 1 - 4, 2018

Spokane, WA

Creating sets in Alma from Alma Analytics Reports

Running Jobs



Run a Job

Admin Analytics

Manage Jobs and Sets

★ Run a Job

★ Monitor Jobs

★ Manage Sets

Manage Exports

Run a Job - Select Job to Run

1 ? Cancel Next

1 - 20 of 129

Description



Type : All

Source type : All

	Name	Description	Content Type	Type
1	<input type="radio"/>	Prevent FRBR and/or Dedup in Discovery	Prevent groups of records from deduping and/or FRBRizing	Bibliographic title Discovery Management
2	<input type="radio"/>	Recalculate Local Resource Types Job	Recalculate local resource types according to the defined local resource types	Bibliographic title Discovery Management
3	<input type="radio"/>	Delete External Data Sources	Delete External Data Sources	External Data Sources Discovery Management
4	<input type="radio"/>	Export Authority records	Export set of local authority records	Authority MMS Export

Run a Job - Filters

- Can filter by: **Job Type**
- Or, search by Job name or description

Run a Job - Select Job to Run

1 - 4 of 4 Description

Type: All Source type: All

	Name	Description	Content Type	Type	
1	<input type="radio"/>	Add 918 for publishing to PQ	Add 918 for publishing to PQ	Bibliographic title	Marc 21 Bib normalization
2	<input type="radio"/>	Bib OCLC Republish Set of Titles	Bib OCLC Republish Set of Titles	Publishing bulk	Publishing
3	<input type="radio"/>	Holding OCLC Republish Set of Titles	Holding OCLC Republish Set of Titles	Publishing bulk	Publishing
4	<input checked="" type="radio"/>	Primo Republish Set of Titles	Primo Republish Set of Titles	Publishing bulk	Publishing

Run a Job – Find the Set

Run a Job - Select Set

1 - 20 of 855

Name

Content Type: All

	Name	Type	Content Type	Create Date
1	000000000000 - titles - 28/06/2017 00:48:30 CDT	Itemized	All Titles	28/06/2017 08.48.44 IDT
2	00000000test	Logical	All Titles	14/09/2017 10.18.15 IDT
3	0001-int note	Logical	Physical titles	20/12/2016 20.59.47 IST
4	000913219334	Logical	All Titles	22/02/2017 19.49.29 IST
5	000CIN_coll_test	Logical	Collections	19/01/2016 14.00.43 IST
6	000farm	Logical	Physical titles	19/07/2017 17.16.16 IDT
7	000ind	Logical	All Titles	26/06/2017 21.11.57 IDT

Content Type: Look-up or select

- All
- All Titles
- Collections
- Digital titles
- Electronic collections
- Electronic titles
- Physical titles

Name

Created by

Run a Job – Follow the Wizard and Confirm

Run a Job - Review and Confirm

1 — 2 — 3

Cancel Back Submit

General Information

Job Name **Primo Republish Set of Titles - 000913219334 - 19/03/2018 00.07.01 IST**

Set Information

Set ID **1912975240000561**

Name **000913219334**

Set Size **2**

API Information

URL **POST /almaws/v1/conf/jobs/M117?op=run**

XML **<job>**

Monitoring Jobs



Monitor Jobs

Admin Analytics

Manage Jobs and Sets

- ★ Run a Job
- ★ Monitor Jobs
- ★ Manage Sets
- Manage Exports

Monitor Jobs

Scheduled **Running** History

1 - 4 of 4 Job details

Job Category: All Status: All Submit Date Range: 31/03/2018 - 01/04/2018

Name	Job ID	Job Category	Creator	Submit Date	Start Date	End Date	Status	
1 Export Bibliographic Records - Records to filter by existence of 997 field - filtered - 01/04/2018 16.48.49 IDT - 01/04/2018 16.56.02 IDT	3407605930000561	Repository	justine.burc... 	01/04/2018 16.56.04 IDT	01/04/2018 16.56.04 IDT	01/04/2018 16.56.09 IDT	Completed Successfully	<input type="button" value="..."/>
2 Filter set by indication	3407599820000561	Repository	justine.burc... 	01/04/2018 16.48.59 IDT	01/04/2018 16.49.00 IDT	01/04/2018 16.49.17 IDT	Completed Successfully	<input type="button" value="..."/>
3 Itemize a set from MD import Report job	3407435580000561	Repository	justine.burc... 	01/04/2018 16.34.07 IDT	01/04/2018 16.34.08 IDT	01/04/2018 16.34.12 IDT	Completed Successfully	<input type="button" value="..."/>
4 Metadata Import: JNB - Test Filtering out by 917	3402990240000561	Import	justine.burc... 	01/04/2018 16.22.57 IDT	01/04/2018 16.22.57 IDT	01/04/2018 16.30.36 IDT	Completed Successfully	<input type="button" value="..."/>

Monitor Jobs – Report

< Job Report



Completed
Successfully

Itemize a logical set job

Process ID 3382578100000561
Finished on 14/03/2018 12.18.23 IST
Status Completed Successfully
Records processed 1

Started on 14/03/2018 12.18.23 IST
Total run time 0.201 Seconds
Status date 14/03/2018 12.18.23 IST
Records with exceptions 0

Counters

Set name AH kleine wikinger geht auf reisen - itemized - 14/03/2018 12.18.11 IST
Number of items 1
Parent set name AH kleine wikinger geht auf reisen

Only Some Jobs can be Reversed/Restored

- Always test on small set, if possible on Sandbox

Restoring Records Removed or Changed by Jobs

PERMISSIONS: To restore records removed or changed by jobs you must have the following role:

- Repository Manager

You can restore records that were removed or changed by the following jobs:

- Withdraw items
- Delete portfolios
- Delete bibliographic records
- KORMARC/MARC 21/UNIMARC normalization
- Change holdings information
- Authorities-preferred term correction (see [Authorities - Preferred Term Correction](#))

You can restore up to 5000 records. This includes any related records. For example, holdings and item records are counted separately when restoring their bibliographic record.

! **Important** Be careful when running the Restore Jobs functionality, as it is not possible to roll it back.

- Note**
- The restore job cannot properly handle any type of suppressed record (bibliographic or holdings).
 - The restore job functionality is not currently supported at all when working with a Network Zone.

Next Steps, Support Resources and Feedback



Next Steps and Resources

- Online Help:
 - Managing Search Queries and Sets:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets)
 - Running Manual Jobs on Defined Sets:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets)
- Additional support resources within the ExLibris Ecosystem:
 - [Idea Exchange](https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/31242052-analytics-itemized-sets): Analytics Itemized Sets: <https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/31242052-analytics-itemized-sets> - *Planned*
 - [Developer Network](https://developers.exlibrisgroup.com/blog/Alma-RAPID-OAI-Setup-and-Configuration): Tech Blog - Alma - RAPID OAI Setup and Configuration, by Laura Guy:
<https://developers.exlibrisgroup.com/blog/Alma-RAPID-OAI-Setup-and-Configuration>
- [2018 Technical Seminar Presentations](#) (Cross-Product section of CKC)

Next Steps and Resources (2)

- Knowledge Articles (randomly selected):
 - Batch delete Process Type "Technical - Migration", or putting items in place in bulk:
[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/Items not in place \(not available\) - how to fix in bulkbatch%3F](https://knowledge.exlibrisgroup.com/Alma/Knowledge%20Articles/Items%20not%20in%20place%20(not%20available)%20-%20how%20to%20fix%20in%20bulkbatch%3F)
 - Create a set to close lost loans:
[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/Create a set to close lost loans](https://knowledge.exlibrisgroup.com/Alma/Knowledge%20Articles/Create%20a%20set%20to%20close%20lost%20loans)
 - Items get stuck in process "Transit item" after scan-in:
[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/Items get stuck in process %22Transit item%22 after scan-in](https://knowledge.exlibrisgroup.com/Alma/Knowledge%20Articles/Items%20get%20stuck%20in%20process%20%22Transit%20item%22%20after%20scan-in)
 - Purge users based on a set, carefully:
[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/Purge users based on a set%2C carefully](https://knowledge.exlibrisgroup.com/Alma/Knowledge%20Articles/Purge%20users%20based%20on%20a%20set%2C%20carefully)
 - Remove Community Zone Bibliographic Records without Portfolios from the Institution Zone:
[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/Remove Community Zone Bibliographic Records without Portfolios from the Institution Zone](https://knowledge.exlibrisgroup.com/Alma/Knowledge%20Articles/Remove%20Community%20Zone%20Bibliographic%20Records%20without%20Portfolios%20from%20the%20Institution%20Zone)
 - How to Delete POLs which are already Closed? Could this process be used for purpose of cleanup of bibliographic records too?
[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/How to Delete POLs which are already Closed%3F Could this process be used for purpose of cleanup of bibliographic records too%3F](https://knowledge.exlibrisgroup.com/Alma/Knowledge%20Articles/How%20to%20Delete%20POLs%20which%20are%20already%20Closed%3F%20Could%20this%20process%20be%20used%20for%20purpose%20of%20cleanup%20of%20bibliographic%20records%20too%3F)

Questions?

Any Final Questions?





Thank You!

ExLibris[®]
a ProQuest Company