



Alma: All you Wanted to Know About Sets

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- What are sets?
- Why use sets?
- Scenarios
 - Creating sets
 - Working with sets
- Q&A and resources


What are Sets?




- A set is a virtual group of records in Alma.
 - Logical – A saved search query, which is run every time the set is referenced = DYNAMIC
 - Itemised – Individual items, selected or uploaded by the librarian = STATIC









Logical Sets

All titles ▾ Keywords ▾ horses  Advanced ▾

All Titles (1 - 20 of 141) horses  **Save Query**

 Institution  Network  Community





Expand ▾    Excel

1  **Drawing: Horses**  

Book (Book - Electronic) text; computer; online resource By Foster, Walter T ([Place of publication not identified] Walter Foster Publishing Incorporated 1989)

Language: English
ISBN: 0-929261-72-0 and others
Record number: (CKB)2550000001122295

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

2  **Horses and Ponies**   

Book (Book - Electronic) text; computer; online resource By Farrell, Russell ([Place of publication not identified] Walter Foster Publishing Incorporated 2005)

Language: English
ISBN: 1-56010-862-2
Record number: (CKB)3280000000006560

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

Itemised Sets

On the Manage Sets page:

< Set Details Add Members to Set Cancel Save

General Information

Set name *

Description

Note

Set content type * **All Titles**

Set type **Itemized**

Private Yes No

Status Active Inactive

Creation date **12/03/2018 16:54:50 IST**

Created by **Ex Libris**


Updated by **Ex Libris**

Content Origin **Institution only**


Set ID -


Add Contents from File to Set



From File From Analytics

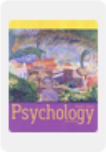
File  The maximum file size is 10 MB.

Itemised Sets

All titles ▾ Keywords ▾ **psychology** 


All Titles (1 - 20 of 6,809) | psychology 

Select All Expand ▾  

1 

Psychology / David G. Myers. Edit Record Add Reminder ...

Book {Book - Physical} By Myers, David G. (New York : Worth Publishers 2008, c2010.)

Language: English  **Orders: 1**


Subject: Psychology--Textbooks. **Requests: 1**

ISBN: 9781429215978 and others

Edition: 9th ed.

Record number: (Aleph)002629122BCL01

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

2 

Psychology Edit Record Add Reminder ...

Book {Book - Electronic} (Henry Holt and Company)

Language: English

Record number: (CKB)1000000000395824

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

Combining Sets

Set content type **All Titles**

Private Yes No

Creation date **03/27/2016 08:55**

Updated by **admin1**

Set ID -

Set type **Itemized**

Status Active Inactive

Created by **admin1**

Content Origin **Institution only**

Combine sets

Combine **Iron curtain**

Operation

With *

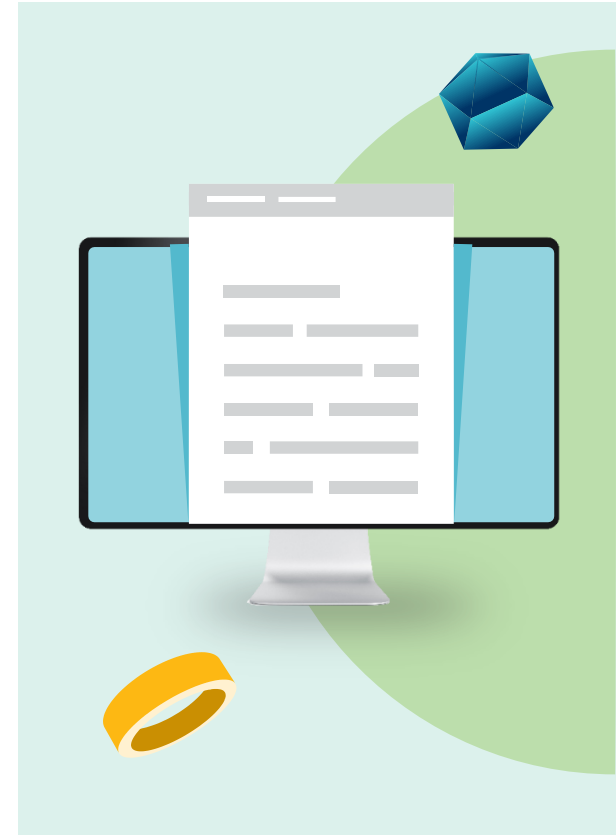
Why Use Sets in Alma?

- Find and save groups of records to take action
 - Inventory management
 - Bulk record changes
 - Exporting records
 - Deleting or suppressing records



Bulk Record Changes

- Records may be of various types:
 - Title records
 - Physical title records
 - Electronic title records
 - Physical item records
 - Digital file metadata records
- Tasks include:
 - Normalisation of the set's records
 - Global change of record information



Running a Job

Run a Job - Select Job to Run

1 - 20 of 67 Description 🔍

Type: All Source type: All

	Name ▲	Description ↕	Content Type	Type ↕
1	<input type="radio"/> Add reminders	Add a reminder for each record in the set	Bibliographic title	Metadata Management
2	<input type="radio"/> Bib OCLC Republish Set of Titles	Bib OCLC Republish Set of Titles	Publishing bulk	Publishing
3	<input type="radio"/> Cancel physical items requests	Cancel open requests for physical items.	Physical item	Request
4	<input type="radio"/> Cancel physical titles requests	Cancel open requests for physical items.	Physical title	Request
5	<input type="radio"/> Change electronic portfolio information	Update portfolio information for a set of electronic portfolios	Portfolio	Information Update
6	<input type="radio"/> Change Holding Information	Update holding information for a set of physical items	Physical item	Information Update
7	<input type="radio"/> Change loan to claimed returned	Update item loan status to claimed returned.	Physical item	Loan
8	<input type="radio"/> Change physical items	Update item information for a set of physical items.	Physical item	Information Update
9	<input type="radio"/> Change PO Lines Status	Change PO Lines Status for PO Line set	Purchase order line	Change PO lines Status
10	<input type="radio"/> Close lost loans	Delete item loans marked as lost.	Physical item	Loan

Example Job – Change item location or due dates

Change location fields

<input type="checkbox"/>	Change Type *	Permanent	Due Back	<input type="text"/>	
	New library	<input type="text"/>	New location	<input type="text"/>	
<input type="checkbox"/>	Remove temporary item indication				
<input type="checkbox"/>	Remove temporary library and location (you must also select "Remove temporary item indication")				

Change other fields

<input type="checkbox"/>	Item policy	<input type="text"/>	Condition	Unconditionally	
<input type="checkbox"/>	Material type	Book	Condition	Unconditionally	
<input type="checkbox"/>	Inventory date	<input type="text"/>	Condition	Unconditionally	
<input type="checkbox"/>	Provenance	<input type="text"/>	Condition	Unconditionally	

Related Alma Functionality

- Depending on your job function, you might need to have roles assigned for:
 - Indication rules
 - Normalisation rules
 - Jobs
 - Analytics



Knowledge Centre Resources

- [Managing Search Queries and Sets](#)
 - Including roles required for record access & which IDs required for itemised sets
- [Alma MARC 21 Search Indexes](#)
- [Missing items workflows presentation by Northwestern and Central Michigan Universities](#)
- [Blog post for bad diacritics rule](#)
- [Jobs and the roles that control them](#)





THANK YOU!

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