Alma: Working with Sets and Jobs

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Introductions

• Sharai Perkes, MLIS, Senior Training and Consulting Partner
Sharai is a Global Education Team member who designs, develops and delivers training programs that enable library staff to master new products and technologies. She joined ProQuest in 2009 after completing her MLIS at the University of Washington iSchool. Prior to that, Sharai was a software developer for 11 years.

A Favorite Hike: Naches Peak at Mount Rainier

• Yaala Ariel-Joel, MLIS, Support Analyst
Yaala has been working with Aleph, SFX and Alma customers for 16 years. Prior to joining Ex Libris Yaala has worked for 10 years as a reference librarian, earlier serving as a cataloger, altogether in some very special libraries.

A Favorite Hike: Otter Creek in Kentucky
Introductions

• Carolyn Sprague, MLS, Training Consultant
  Carolyn Sprague is a Training Consultant with the Global Education team. Carolyn has worked at Ex Libris for 9 years and was previously a Primo implementation consultant. Carolyn received her MLS from Simmons College Boston.

Agenda

1. About Sets and Jobs
2. Creating and Managing Sets
3. Running Jobs
4. Monitoring Jobs
5. Summary, Resources, and Survey
Introduction

Identifying and grouping sets of records together based on specific criteria is critical for managing your print, electronic, and digital resources.

Use sets to:

- Create a pick-list
- Correct bibliographic records
- Run jobs that:
  - Move items from one location to another
  - Update user information
  - Withdraw items
  - Modify Purchase Order (PO) Lines
  - Update lost or claimed returned items
Objectives

By the end of this session, you will be able to:

- Create and manage sets
- Differentiate between logical and itemized sets
- Run jobs using sets
- Monitor jobs

User Roles

Roles required to create sets and run jobs on defined sets:

- Resource Management Sets
  - Cataloger, Catalog Manager or Administrator
  - Digital Inventory Operator
  - Electronic Inventory Operator
  - Repository Manager
  - Requests Operator

- Acquisitions Sets:
  - Acquisitions Administrator
  - Purchase Operator, Manager
  - Vendor Manager
  - General System Administrator

- User Sets
  - User Manager, Administrator

- Fulfillment Sets
  - General Systems Administrator
  - Fulfillment Administrator
  - Requests Operator
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Set Content Types

- Resource Management Sets
  - All Titles
  - Authorities
  - Collections
  - Digital files
  - Digital titles
  - Electronic collections
  - Electronic portfolios
  - Electronic titles
  - Physical items
  - Physical titles

- Acquisition Sets
  - PO line
  - Vendor

- User Sets
  - User

- Fulfillment Sets
  - Physical items
Definition: Set Types

**Itemized Sets...**
- Individually selected records
- Static set of results
- Records with random criteria
- Homogenous record members

**Logical Sets...**
- All results of a search query
- Dynamic set of results
- Records with specific criteria
- Homogenous record members

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**Agenda**

- About Sets and Jobs
- *Creating and Managing Sets*
  - *Creating Sets*
  - Managing Sets
- Running Jobs
- Monitoring Jobs
- Summary, Resources, and Survey
Add Members to Itemized Set

Modify Itemized Set
Set Demo 1: Create Itemized Set

Objective: Move items to Main Library for May display shelf: World Laughter Day.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets.

2. Create and save an itemized set called May Display: World Laughter Day.

3. Choose Physical items as the set content type.

4. Perform these searches and add some items:
   • Search for laughter, select several items.
   • Search for humo* and select several items.

5. Click on the Done button to finish the set.

Add Logical Set
Set Demo 2: Create Logical Set

**Objective:** Download bib records from WorldCat added after July 15, 2016 for review.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets.

2. Create and save a *logical set* called **Recently Added WorldCat Bib Records**.

3. Choose **All titles** as the set content type.

4. Choose Advanced Search criterion, and save the set:
   - **Originating System / Contains Keywords**: worldcat

5. Modify the set; add Advanced Search criterion:
   - **MMS Creation Date (Title) / After**: July 15, 2016
Set Demo 3: Create PO Line Set

Objective: Correct error in the fund used in recent purchase orders for materials from The Bookhouse.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets

2. Create and save a *logical* set called: Bookhouse Purchases Orders Sent.

3. Use these criteria:
   - **Workflow**: Sent
   - **Material Supplier**: BKHS

Create Fulfillment Set

The Create Fulfillment Set link is under the FULLFILLMENT menu.
**Objective:** Close out lost items that were due in a specific year.

1. Navigate to FULFILLMENT > Advanced Tools > Create Fulfillment Sets

2. Create an *itemized* called:
   - Session 1: *Lost Items Due in 2014*
   - Session 2: *Lost Items Due in 2015*

3. Use these parameters:
   - **Session 1:**
     - Loan status: Lost
     - Due date: 2014
   - **Session 2:**
     - Loan status: Lost
     - Due date: 2015
Set Demo 5: Create User Sets

Objective: Set status of Active users with an specific expiration date to Inactive.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets

2. Create a logical set of Users called:
   - Session 1: Active Users Expired in 2014
   - Session 2: Active Users Expired in 2015

3. Use the following criteria:
   - Session 1:
     - Status: Active
     - Expiration date: 2014
   - Session 2:
     - Status: Active
     - Expiration date: 2015

Use Analytics to Create User Set With Complex Criteria

1. Design and download analytics report

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>1</td>
<td>Primary Identifier</td>
<td>Expiry Date</td>
<td>Status</td>
</tr>
<tr>
<td>2</td>
<td>bernardo.gomez</td>
<td>12/21/2014</td>
<td>Active</td>
</tr>
<tr>
<td>3</td>
<td>bonita.bryan</td>
<td>12/21/2014</td>
<td>Active</td>
</tr>
</tbody>
</table>

2. Format data for upload into set

3. Create and populate set
Manage Sets

<table>
<thead>
<tr>
<th>Itemized Sets</th>
<th>Logical Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td>Catalog set</td>
<td>Catalog set</td>
</tr>
<tr>
<td>Members</td>
<td>Results</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Duplicate</td>
</tr>
<tr>
<td>Combine sets</td>
<td>Itemize</td>
</tr>
<tr>
<td>Filter set</td>
<td>Combine sets</td>
</tr>
<tr>
<td>Delete</td>
<td>Filter set</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
</tr>
</tbody>
</table>

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Run a Job

Run a job = perform a specific action or task for a set of records

Select Job
Job Demo 1: Move Physical Items

**Objective:** Move items to Main Library for May display shelf: World Laughter Day.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job.

2. Select the job, *Move physical items* and associate it with the Physical Items set you named: *May Display: World Laughter Day*.

3. Enter task parameters to change items to Main Library and run the job.

4. If you are using *your own library’s sandbox*, run the job.

Job Demo 2: Export Bibliographic Records

**Objective:** Download bib records from WorldCat added after July 15, 2016 for review.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job.

2. Select the job, *Export Bibliographic Records* and associate it with the set you named: *Recently Added WorldCat Bib Records*.

3. If you are using *your own library’s sandbox*, run the job.
**Job Demo 3: Update PO Line Transactions**

**Objective:** Correct error in the fund used in recent purchase orders for materials from The Bookhouse.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job
2. Select the job, *Update PO Line transactions* and associate it the set you named: *Bookhouse Purchase Orders Sent.*
3. Enter task parameters to change the fund used.
4. If you are using *your own library’s sandbox*, run the job.

**Jobs Demo 4: Close Lost Loans**

**Objective:** Close out lost items that were due before in a specific year.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job
2. Select the job, *Close Lost Loans* and associate it with the set you named:
   - Session 1: *Lost Items Due in 2014*
   - Session 2: *Lost Items Due in 2015*
3. Run the job to delete item loans marked as lost
4. If you are using *your own library’s sandbox*, run the job.
**Jobs Demo 5: Update User Information**

**Objective:** Set status of Active users with an specific expiration date to Inactive.

1. Navigate to Administration > Manage Jobs and Sets > Run a Job

2. Select the job, **Update User Information** with the set you named:
   - Session 1: **Active Users Expired in 2014**
   - Session 2: **Active Users Expired in 2015**

3. Configure the job to set the user **Status** to **Inactive**.

4. If you are using **your own library's sandbox**, run the job.

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4. **Monitoring Jobs**
5. Summary, Resources, and Survey
Monitor Jobs

Monitor Jobs = follow the status of the job to completion
Monitor Jobs

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Summary

During this presentation, you learned how to:

- Create and manage sets for which data will be changed
- Distinguish between logical and itemized sets
- Run jobs using sets to perform a change in data
- Monitor jobs to completion

Recommended Knowledge Center Articles

Articles about Sets:
- Managing Search Queries and Sets
- Managing Fulfillment Sets
- Create User Set based on Analytics

Articles about Jobs:
- Overview of Jobs
- Running Manual Jobs on Defined Sets
- Viewing Scheduled Jobs
- Viewing Running Jobs
- Viewing Completed Jobs
Additional Resources

- **Technical Seminar Presentations**
  (located in the Cross-Product section of the Knowledge Center)

- Additional support resources within the ExLibris Ecosystem:
  - Ex Libris Support Portal
  - Idea Exchange
  - System Status Pages: Single Tenant ENV / Multi-Tenant ENV
  - Developer Network
  - Alma Online Training

Q & A

Any Questions?
Session Survey Evaluation

Please use the following link to provide feedback on your sessions:

https://www.surveymonkey.com/r/techsem2017

THANK YOU