

## Applying Changes to Batches of Records in Alma: Jobs

Welcome to this training session on Jobs in Alma. In a previous session, you learned how to create batches of records in Alma, which are called "Sets." The main reason to create sets is to work on records in batches or to perform global tasks with automated processes, and that's what Jobs do. Let's see how they work.

From Alma's Admin menu, select Run a Job. Depending on your roles, you may see quite a few jobs on this list. Find the job you need using the pagination links at the bottom, or by using the three filters, or by searching the list by description or name. For this example, select the Withdraw items job. This job deletes items from your Institution Zone to ensure it is up-to-date and represents only those items that are actually in your collection. Click Next to go to the second step of the job wizard.

Now select the set you want to use with this job. The set needs to be created ahead of time. Notice that the sets on this list are only the ones created with the Content Types of Physical Items and Physical Titles. Alma isn't showing sets with other content types, because the Withdraw items job only works on physical resources. Also, Alma won't show any sets that are Inactive, and it won't show sets that are private for someone else. It will show your own private sets, as well as sets that are public within your institution. Select the set you want, and click Next.

A message pops up letting you know how many members are in this set. Now you will select various Task Parameters. Each job has different parameters that need to be chosen. This training session will not cover the parameters for the dozens of jobs available. So, if you're unsure what a parameter is for, select the Help menu and choose Help For This Page. The documentation page that opens has a list of jobs and their relevant parameters. Back in Alma, make choices for the parameters for this job, and click Next.

Depending on the job, there may be more steps in the job wizard to fill out more parameters. But eventually you will reach the page where you review and confirm everything. You can still go back and change things if you need to.

This is also where you can change the Job Name. The default name is a combination of the name of the job, the name of the set, and the date and time. You can keep that as it is, or change the name to something else that will help you find it when you're monitoring the progress of the job.

When you're satisfied everything is the way you want it, click Submit. A popup message asks you to confirm the job, because after you click Confirm here, you can't reverse or undo whatever changes the job makes.

Alma takes you to the Monitor Jobs page. By the way, you can get to this page any time you want by selecting the Admin menu and choosing Monitor Jobs. The Running tab will show jobs that are currently running, including the one you just started, as well as any others running now. Scheduled jobs that are

currently running also show up here. If there are many jobs on this page and you can't quickly find the one you want, you can use the Job Category filter or search by Job Name or Job Details.

If the job you started finishes quickly, it won't be on the Running tab anymore. Switch to the History tab to find it, as well as other jobs that are done. Because there could be hundreds of jobs on the History tab, this page has several filters to help find the completed job. For example, by default, this page only shows jobs done in the last day. You can change the date range to show jobs completed earlier, and you can use the filters to show only jobs in a certain job category or with a certain Status, such as Aborted, or Completed, and so on.

By the way, you'll also receive an email when a job is done, which is helpful for jobs that take a while.

Click the name of a job to see the job report. The job report will provide different kinds of information depending on the job and on whether the job was completed or not. Some jobs will also provide an Event Report, which will highlight the significant actions such as successful completion of a job and information about any errors that occurred during the running.

Back on the Monitor Jobs page, you may have noticed the Scheduled tab. Scheduled jobs are those that automatically run on a regular schedule, such as every day or once a week, and they don't require a set created in advance. Most of these jobs cannot be directly controlled by your institution; they are set up during your Alma implementation, and can only be changed by Ex Libris staff. However, you can run some of the jobs right now using the row-action menu. This is also how you can see the history of the running of this job, and how you can set up certain staff to be notified each time the job is done.

There is one more kind of job that shows up on the Running tab and the History tab, and that is a Workflow job. This is a job that runs when someone at your institution performs a task that requires Alma to perform a particular process. For example, when you submit a purchase order, Alma automatically runs a job to send that purchase order to the vendor. A workflow job is not a manual job you set up here, nor is it a scheduled job set up in advance, but it does appear on the Monitor Jobs page.

You can learn more about specific jobs and the sets they require in training sessions on user management, fulfillment, acquisitions, and resources.

And those are some of the ways you can use jobs to make changes to records in Alma.