

## Resources Sets and Jobs - Change Physical Items

Welcome to this training session on resources jobs in Alma. In other training sessions, you learned how to create sets of records in Alma, and how to use jobs to apply changes to all members of those sets. In this session, you will see a specific example of how to use sets and jobs to change resources, as you see how to temporarily move some books to a new location for a special display.

First, you need to create the set of items that will be moved. From Alma, select the Admin menu, and choose Manage Sets. Click Add Set, and choose Itemized Set. Give the set a name, and select any other set parameters. Be sure to set the content type to Physical Items. Then click Add Members to Set. Use the search bar to find the items to move. As you find items, select the check boxes and click Add Selected. When you have added all the items you want to move, click Done. You can check your list using the row-action Members.

Now you need to set up the job to move the items to the special display location. On the Admin menu, select Run a Job. Staff at your institution who work with resources and the catalog in Alma have many jobs that can speed up their work, such as fixing normalization, setting management tags, and so on. The example job for this session is an Information Update job, which is called Change physical items. Select the job and click Next.

Find the set of items you just created. Notice that the only sets showing here are those with a Content Type of Physical items or Physical titles, because the Change physical items job can only work on those content types. So, if you don't see the set you created, it's possible the content type was incorrectly defined, and you'll need to start over creating the set.

On the next page, you enter the Task Parameters. If you're not sure what a particular parameter is for, select the Help menu and choose Help For This Page. The document that opens has definitions for the parameters.

In this job for changing physical items, the parameters are organized into a few groups. The group you want for this example is the second group -- Change temporary location information. For each parameter that you want to change, you first click the check box, then make the change. Set the item temporary indication to Yes, so anyone can search for items that are at a temporary location. Later, when you move these items away from the temporary location and back to their permanent location, you can use these parameters to clear the temporary information.

Select the Temporary Location with the dropdown menu for the location of the special display. For the Conditions dropdown menu, you could choose Unconditionally, which means all items in the set will get this new location; or you could choose one of the conditions. For example, if you only want to move items that are not already at a temporary location, choose If field empty. By the way, when you move an item to a temporary location, a holdings record is created for the new location; however, the holdings record shows up in Alma with an icon indicating it is temporary.

If your institution assigns temporary call numbers for items in a temporary location, make selections on these parameters. If these items will all leave this temporary location on a particular date and return to their permanent locations, choose a Due back date. By the way, when that date arrives, Alma will automatically run a job to restore those items to their permanent location. Finally, you can choose a temporary item policy. For example, while these books are on display in the temporary location, you may want the items to have a shorter loan period. That way they will more quickly get back to the special display and be available to another patron. Or you could even choose to make them Not for Loan while they are on display. Again, you can put conditions on any of these changes.

That's all the parameters for changing the temporary location, but let's look at some of the other parameter groups available for this job about changing physical items.

The first group is for changing permanent location information. In addition to changing the permanent location itself, you can change the call number and storage location ID. By the way, when you change the permanent location of an item, a new holdings record is created for the new location. If there are no more items in the old holdings record, the old holdings record will be deleted, and that can affect any attached PO Lines; see the documentation for more details on this.

After the group of temporary location information is a group of parameters to change the general information about the items in the set. Parameters include changing the material type, the permanent item policy, key dates, physical condition, and so on.

Farther down the page are parameters to change the inventory information, including weeding date if that's the process in which you're engaged.

The last group of parameters allows you to change the text in the various Notes fields on all the items in the set. Depending on your institution's policies, you may have particular uses for these Notes. By the way, any note you add to a field here will completely delete text currently in that note field, unless you choose the Condition - if field empty. There is no way to add text to an existing note with this job; instead, you have to do it manually by editing each item individually and adding text to the note field.

And that's how you can change information about physical items using sets and jobs in Alma.