Alma Administration – General  
Scheduling and Monitoring Jobs

Hi, in this session, we'll learn how to: schedule certain jobs in Alma; monitor the status of scheduled and manual jobs; and add a widget to your homepage that shows the scheduled jobs status.

Some jobs in Alma are manual jobs, which means they are run by library staff on the fly. Other jobs are scheduled, which means they run at certain time intervals. Many jobs can be run both manually and scheduled. Among the scheduled jobs, some are scheduled by Ex Libris and cannot be changed by the institution, while others can be scheduled by you, the Alma administrators.

Primarily, the jobs you can schedule are related to Fulfillment and Acquisitions. To schedule Fulfillment related jobs, open Alma Configuration > Fulfillment > General: Fulfillment Jobs Configuration.

Here you can see and configure all the scheduled jobs related to Fulfillment; for example, the Borrowing Activity Report Job and the Send Overdue Notices Job. Each job can be set as Active, which means it will run on schedule; or Inactive, which means it will not run on its own, but can still be run manually where available.

To configure the schedule of an Active job, open the Schedule dropdown-list and select a schedule. Different jobs offer different possible schedules. For example, the Borrowing Activity Report job can be run weekly (on the selected day), monthly (on the selected date), or not run on schedule at all. Note that depending on your region and settings, you may see different scheduling options available here.

Some jobs can be run manually by clicking Run Now.

There are other job-specific configurations you can make on this page. For example, in the Anonymization job you can decide which fulfillment activities will have their identifying user information scrubbed when certain conditions are met.

When done configuring the jobs, click Save.

Acquisitions related jobs can be configured under Alma Configuration > Acquisitions > General: Acquisition Jobs Configuration. Here you can configure the PO Line package job and the SUSHI harvesting job.

Resource Management jobs can be configured in a similar page.

Now let's see how you can monitor the statuses of all jobs in Alma. Go back to Alma > Admin > Manage Jobs and Sets: Monitor Jobs.

In the Scheduled tab, you can see all your upcoming scheduled jobs, whether scheduled by library staff or Ex Libris. You can filter this page by Job Category, for example to see only Fulfillment jobs. For each job, you can see whether it's active, what its schedule is, and when is the next scheduled run. Under row actions, you can select to view the Job History of previous runs. And if you wish to receive email notifications when this job is run, you can add yourself and other users as subscribers.

In the Monitor Jobs Running tab, you can follow the progress of currently running jobs. This includes both scheduled jobs and manual jobs, such as the ones run from Admin > Run a Job.

In the Monitor Jobs History tab, you can see all the completed jobs. You can filter this list by Job Category, Job Status, and the Submit Date Range, for example, to see all the jobs run last month. You can quickly see which jobs Completed Successfully and which Completed with Errors. Under row actions, you can pull up the Job Report which details all the job information, or view Events to see any error messages raised during runtime.

One very convenient way to monitor jobs in Alma is to add the Scheduled Jobs Status widget to your homepage. From the Alma homepage, click the plus icon on the top right of the Alma dashboard. Select the Scheduled Jobs Status widget, and close the Manage Widgets dialog. The widget has been added to your dashboard. You can drag and drop it to the desired location.

The Scheduled Jobs Status widget presents the status of scheduled jobs for the last five days. You can select the date and Job Category to view, and immediately see the failure and success indicators. For more detailed information, click on the arrow for a given job category, and you will be redirected to the Monitor Jobs History tab, filtered to view the selected jobs. In this case, all the unsuccessful jobs, to aid with troubleshooting.

And that's how you schedule and monitor jobs in Alma.

Thanks for joining!