**Resource Management - Sets and Jobs**

**Training Material**

* [**Sets and Jobs**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/N_Sets_and_Jobs)

**Hands on Exercises**

**Instructions**

For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.  To get started, sign into your sandbox environment as **AlmaUser01.**

**Exercise 1:** **Create a logical set of all bib records without inventory**

1. Use the persistent search box to run an **All titles Advanced Search** with the criteria, **Has inventory Equals No**
2. Click **Save Query** to create a logical set of all bib records that do not have inventory records attached
3. Enter a Set name and click **Save**
4. From the Manage Sets screen click on the row action menu (ellipsis) and choose **Results**

**Exercise 2: Create an itemized set of physical items, and run a job on the set**

1. Create an itemized set of physical items
   * **Admin > Manage Jobs and Sets > Manage Sets>** click **Add Set** and select **Itemized**
   * In the **Set Details** screen
     + Enter **Set name**.
     + **Set content type**: choose **Physical items.**
     + **Private**: select **No** if you want the set to be viewable by your colleagues who have appropriate roles
     + Click **Add Members to Set** and use the persistent search bar search box to run a search query of your choice
     + Select a few items to add to the set and click **Add Selected**.
     + Click **Done** to save the set
   * To see records in the set, right click on the row action menu (ellipsis) and click **Members**
2. Run a job on the set to batch update the records in the set

* Go to **Admin > Manage Jobs and Sets > Run a Job**
* Select a job that will batch update the set, e.g. **Change physical items** and click **Next**
* Select the set you just created and click **Next**
* On the **Run a Job – Enter Task Parameters** screen, enter the changes you want to make to all the records in the set and click **Next**
* Review the job details and click **Submit** to run the job

**Exercise 3: Create a set of items in a library of your choice that are lost and due back more than six months ago**

1. Create a Fulfillment Set of all lost items that were due more than six months ago
   * Go to **Fulfillment > Advanced Tools > Create Fulfillment Sets**
   * Enter a **Name** and **Description**
   * Specify appropriate **Loan status** and **Due date before** criteria, and click **Save**
2. Create a logical set of items located at a specific library

* Run a new **Physical items Advanced** search where **Library (Holdings) Equals** [Select the library of your choice]
* Click **Save Query** and name the set "[Library Name] Items"

1. Combine the above sets to create a set of lost items due more than six months ago that are owned by the library specified above
   * Go to **Admin > Manage Sets**
   * Right click on the set called "Lost for 6 months" and select **Combine Sets**
   * Enter a set name, and in the **Combine Sets** section, choose the **And** as the **Operation**, and select the "[Library Name] Items" set you just created
   * Click **Submit** and **Confirm** running the job
   * When the job is complete locate the set

Note that the set is itemized.

* + View the **Members** of the set from the row action menu

To combine sets of records, each set needs to be of the same type, for example you can't combine a title set and an item set.