Alma Essentials – User Management
Update User Records in Bulk

In this session we'll learn how you can edit users in bulk or send them a message. To do this, you first create a set of users, and then run a job on that set, to perform the selected action on the users.

The quickest way to create a set of user records is by saving a search query for users. For example, let's search for all the users with the Job Category "Cataloger". To create a set from this search query, click **Save Query**. Give the set a Name. You can make it available for other Alma staff by deselecting Private. And click Save. We are taken to the Manage Sets page, where our set of Catalogers is now saved. You can always return to this page from the Admin menu > **Manage Sets**. On this page you can edit existing sets and create new ones, in an alternative method to saving a search query.

Having created our set, we can now run a job to update all the users in the set. Suppose for example, we want to assign the License Viewer role to all the Alma users in the Catalogers set.Go to Admin > Run a Job. Filter by Type Users. Select the **Update/Notify Users** job. This job allows you to edit users or send them messages. Click Next. Now select the set of users you'd like to update. We can see the Catalogers set we just created. Next.

In this page you can select one or more actions you'd like to perform on this set of users, such as sending them a notification, adding a purge date to their records, or changing their status to Active. You can learn more about the available options in the documentation. In our example, we want to assign to them a role. Let's select the License Viewer role, and scope it to our institution. Next. On this page we can review and confirm the job details. Our selected set is the Catalogers set, and our only selected action is to add the License Viewer role. Submit. Review the warning and confirm.

In the Monitor jobs page, the Update/Notify users job is running. In the History tab we can see our job has completed successfully and we can view its job report. In the report we can see how many records were processed by the job, and if there were any errors and warnings.

Thanks for joining!