Alma: Working with Sets and Jobs

Sharai Perkes | Senior Training and Consulting Partner
Yaala Ariel-Joel | Support Analyst

ExLibris
a ProQuest Company

Introductions

- **Sharai Perkes, MLIS, Senior Training and Consulting Partner**
  Sharai is a Global Education Team member who designs, develops and delivers training programs that enable library staff to master new products and technologies. She joined ProQuest in 2009 after completing her MLIS at the University of Washington iSchool. Prior to that, Sharai was a software developer for 11 years.

  A Favorite Hike: Naches Peak at Mount Rainier

- **Yaala Ariel-Joel, MLIS, Support Analyst**
  Yaala has been working with Aleph, SFX and Alma customers for 16 years. Prior to joining Ex Libris Yaala has worked for 10 years as a reference librarian, earlier serving as a cataloger, altogether in some very special libraries.
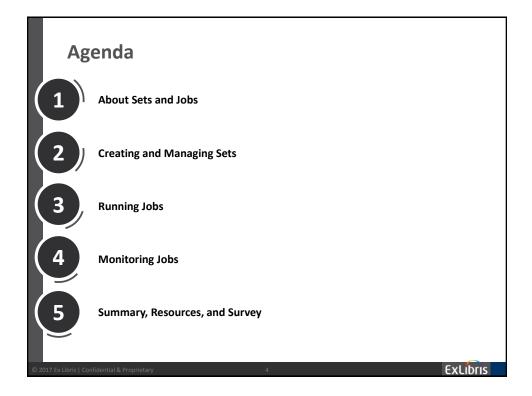
  A Favorite Hike: Otter Creek in Kentucky

2

ExLibris

Introductions

- **Carolyn Sprague, MLS, Training Consultant**
  Carolyn Sprague is a Training Consultant with the Global
  Education team. Carolyn has worked at Ex Libris for 9 years and
  was previously a Primo implementation consultant. Carolyn
  received her MLS from Simmons College Boston.

ExLibris

Agenda

1   About Sets and Jobs

2   Creating and Managing Sets

3   Running Jobs

4   Monitoring Jobs

5   Summary, Resources, and Survey

ExLibris

Agenda

1 About Sets and Jobs
2 Creating and Managing Sets
3 Running Jobs
4 Monitoring Jobs
5 Summary, Resources, and Survey

ExLibris

Introduction

Identifying and grouping sets of records together based on specific criteria is critical for managing your print, electronic, and digital resources.
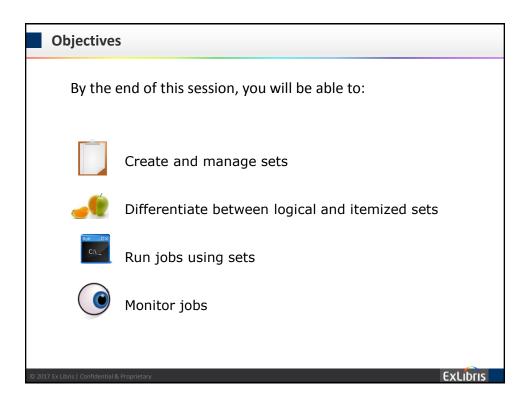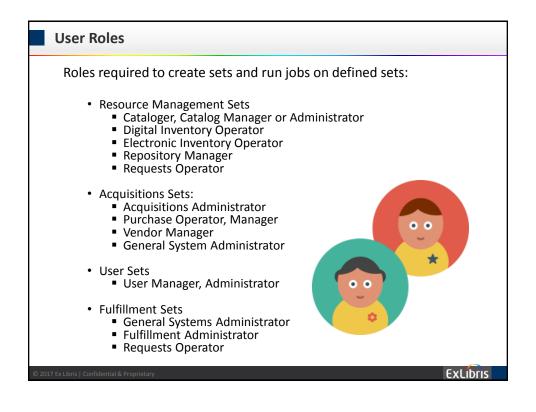
Use sets to:

- Create a pick-list
- Correct bibliographic records
- Run jobs that:
    - Move items from one location to another
    - Update user information
    - Withdraw items
    - Modify Purchase Order (PO) Lines
    - Update lost or claimed returned items

ExLibris

Objectives

By the end of this session, you will be able to:

Create and manage sets

Differentiate between logical and itemized sets

Run jobs using sets

Monitor jobs

ExLibris

User Roles

Roles required to create sets and run jobs on defined sets:

- Resource Management Sets
  - Cataloger, Catalog Manager or Administrator
  - Digital Inventory Operator
  - Electronic Inventory Operator
  - Repository Manager
  - Requests Operator

- Acquisitions Sets:
  - Acquisitions Administrator
  - Purchase Operator, Manager
  - Vendor Manager
  - General System Administrator

- User Sets
  - User Manager, Administrator

- Fulfillment Sets
  - General Systems Administrator
  - Fulfillment Administrator
  - Requests Operator

ExLibris

Agenda

- 1 About Sets and Jobs
- *2 Creating and Managing Sets*
- 3 Running Jobs
- 4 Monitoring Jobs
- 5 Summary, Resources, and Survey

ExLibris

Set Content Types

- Resource Management Sets
    - All Titles
    - Authorities
    - Collections
    - Digital files
    - Digital titles
    - Electronic collections
    - Electronic portfolios
    - Electronic titles
    - Physical items
    - Physical titles

- Acquisition Sets
    - PO line
    - Vendor

- User Sets
    - User

- Fulfillment Sets
    - Physical items

ExLibris

Definition: Set Types

Itemized Sets…

- Individually selected records

- Static set of results

- Records with random criteria

- Homogenous record members

Logical Sets…

- All results of a search query

- Dynamic set of results

- Records with specific criteria

- Homogenous record members
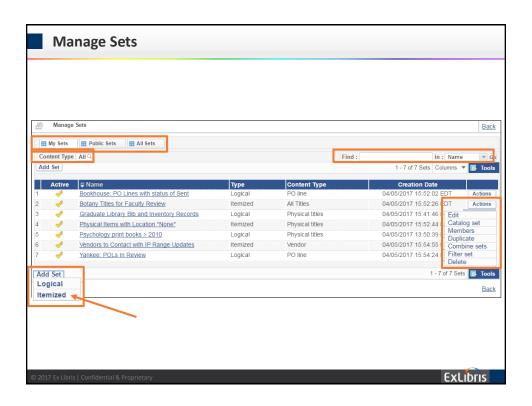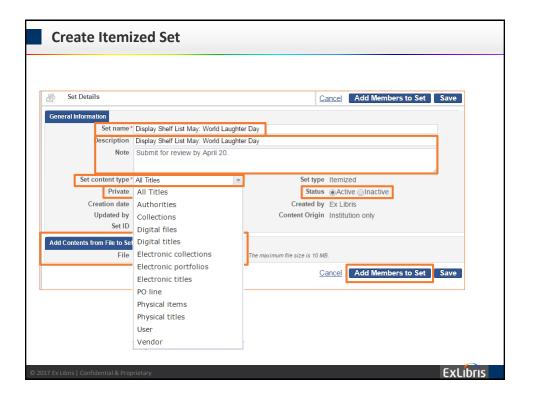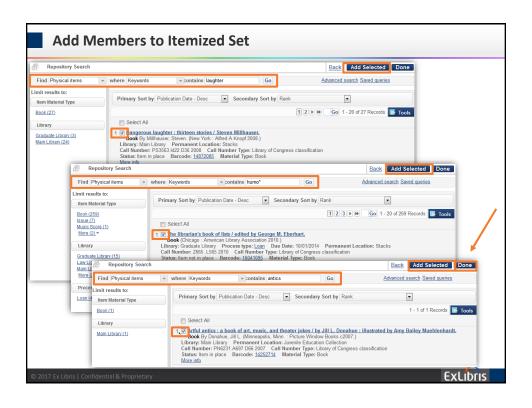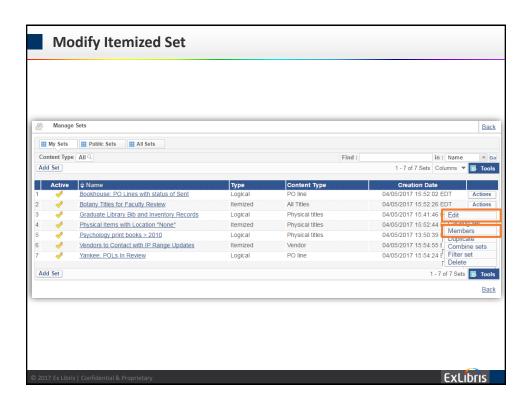
ExLibris

Agenda

- About Sets and Jobs
- ***Creating and Managing Sets***
  - ***- Creating Sets***
  - *- Managing Sets*
- Running Jobs
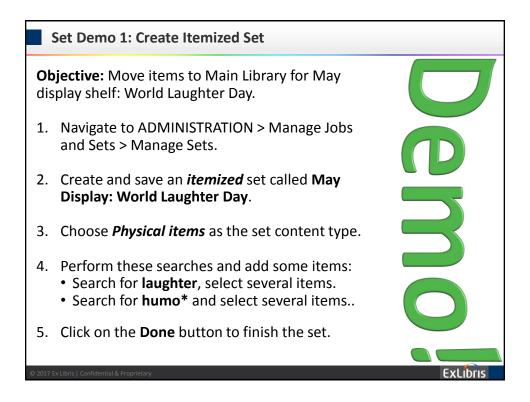- Monitoring Jobs
- Summary, Resources, and Survey

ExLibris

Manage Sets

	Manage Sets					Back

My Sets | **Public Sets** | **All Sets**

Content Type | All 🔍   Find : [_____] in : Name ▾ Go

Add Set   1 - 7 of 7 Sets   Columns ▾ 🔧 Tools

	Active	⬍ Name	Type	Content Type	Creation Date	
1	✓	Bookhouse: PO Lines with status of Sent	Logical	PO line	04/05/2017 15:52:02 EDT	Actions
2	✓	Botany Titles for Faculty Review	Itemized	All Titles	04/05/2017 15:52:26 EDT	Actions
3	✓	Graduate Library Bib and Inventory Records	Logical	Physical titles	04/05/2017 15:41:46	Edit
4	✓	Physical Items with Location "None"	Itemized	Physical titles	04/05/2017 15:52:44	Catalog set
5	✓	Psychology print books > 2010	Logical	Physical titles	04/05/2017 13:50:39	Members
6	✓	Vendors to Contact with IP Range Updates	Itemized	Vendor	04/05/2017 15:54:55	Duplicate / Combine sets
7	✓	Yankee: POLs In Review	Logical	PO line	04/05/2017 15:54:24	Filter set / Delete

1 - 7 of 7 Sets   🔧 Tools

Add Set
Logical
Itemized

Back

Create Itemized Set

	Set Details	Cancel	**Add Members to Set**	**Save**

General Information

Set name * [Display Shelf List May: World Laughter Day]

Description [Display Shelf List May: World Laughter Day]

Note [Submit for review by April 20.]

Set content type * [All Titles ▾]   Set type Itemized

Private   Status ● Active ○ Inactive

All Titles
Authorities
Collections
Digital files
Digital titles
Electronic collections
Electronic portfolios
Electronic titles
PO line
Physical items
Physical titles
User
Vendor

Creation date   Created by Ex Libris

Updated by   Content Origin Institution only

Set ID

Add Contents from File to Set

File   The maximum file size is 10 MB.

Cancel   **Add Members to Set**   **Save**

Add Members to Itemized Set

Modify Itemized Set

Set Demo 1: Create Itemized Set

Objective: Move items to Main Library for May display shelf: World Laughter Day.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets.

2. Create and save an *itemized* set called **May Display: World Laughter Day**.

3. Choose *Physical items* as the set content type.

4. Perform these searches and add some items:
   • Search for **laughter**, select several items.
   • Search for **humo*** and select several items..

5. Click on the **Done** button to finish the set.

ExLibris

Add Logical Set

ExLibris

Create Logical Set

Modify Logical Set

Change Query for Logical Set

Set Demo 2: Create Logical Set

Objective: Download bib records from WorldCat added after July 15, 2016 for review.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets.

2. Create and save a *logical* **set** called **Recently Added WorldCat Bib Records.**

3. Choose *All titles* as the set content type.

4. Choose Advanced Search criterion, and save the set:
   • **Originating System / Contains Keywords**: worldcat

5. Modify the set; add Advanced Search criterion:
   • **MMS Creation Date (Title) / After**: July 15, 2016

ExLibris

Create Logical PO Line Set

Save Query for Logical PO Line Set

Set Demo 3: Create PO Line Set

Objective: Correct error in the fund used in recent purchase orders for materials from The Bookhouse.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets

2. Create and save a *logical* set called: **Bookhouse Purchas Orders Sent**.

3. Use these criteria:
   * **Workflow:** Sent
   * **Material Supplier:** BKHS

Create Fulfillment Set

The Create Fulfillment Set link is under the FULLFILLMENT menu.

Create Fulfillment Set

Set Demo 4: Create Fulfillment Set

Objective: Close out lost items that were due in a specific year.

1. Navigate to FULFILLMENT > Advanced Tools > Create Fulfillment Sets

2. Create an *itemized* called:
   • Session 1: **Lost Items Due in 2014**
   • Session 2: **Lost Items Due in 2015**

3. **Use these parameters:**
   • **Session 1:**
      • **Loan status:** Lost
      • **Due date:** 2014
   • **Session 2:**
      • **Loan status:** Lost
      • **Due date:** 2015

Set Demo 5: Create User Sets

Objective: Set status of Active users with an specific expiration date to Inactive.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Manage Sets

2. Create a *logical* set of **Users** called:
   - Session 1: **Active Users Expired in 2014**
   - Session 2: **Active Users Expired in 2015**

3. Use the following criteria:
   - **Session 1:**
     - **Status:** Active
     - **Expiration date:** 2014
   - **Session 2:**
     - **Status:** Active
     - **Expiration date:** 2015

Use Analytics to Create User Set With Complex Criteria

① Design and download analytics report

② Format data for upload into set

③ Create and populate set

15

Manage Sets

Agenda

1 About Sets and Jobs
2 Creating and Managing Sets
3 Running Jobs
4 Monitoring Jobs
5 Summary, Resources, and Survey

ExLibris

Run a Job

Select Job

Select Set, Enter Parameters

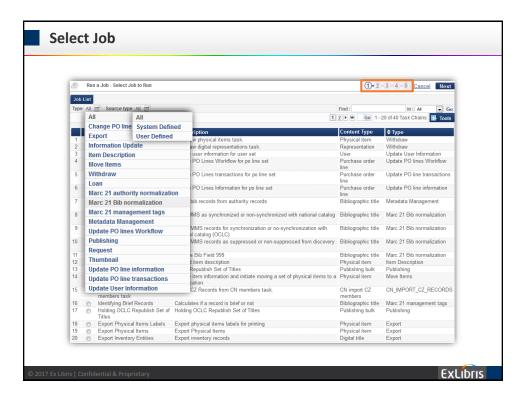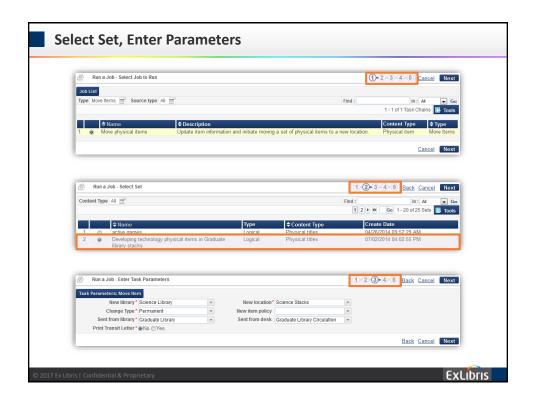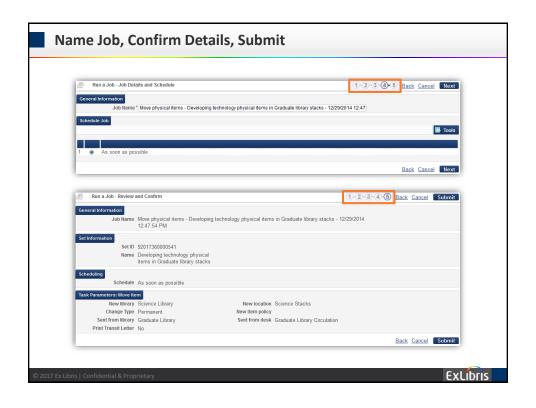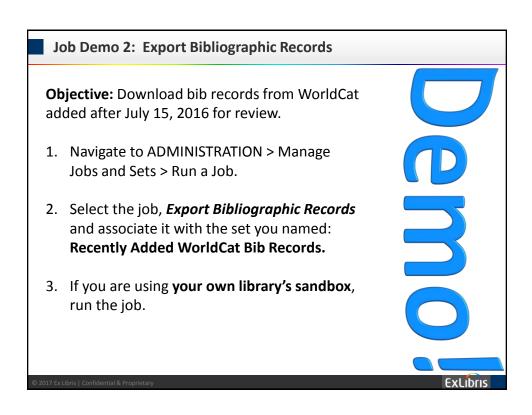## Name Job, Confirm Details, Submit

Job Demo 1: Move Physical Items

Objective: Move items to Main Library for May display shelf: World Laughter Day.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job.

2. Select the job, ***Move physical items*** and associate it with the Physical Items set you named: **May Display: World Laughter Day.**

3. Enter task parameters to change items to Main Library and run the job.

4. If you are using **your own library's sandbox**, run the job.

ExLibris

Job Demo 2: Export Bibliographic Records

Objective: Download bib records from WorldCat added after July 15, 2016 for review.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job.

2. Select the job, ***Export Bibliographic Records*** and associate it with the set you named: **Recently Added WorldCat Bib Records.**

3. If you are using **your own library's sandbox**, run the job.

ExLibris

Job Demo 3: Update PO Line Transactions

Objective: Correct error in the fund used in recent purchase orders for materials from The Bookhouse.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job

2. Select the job, *Update PO Line transactions* and associate it the set you named: **Bookhouse Purchase Orders Sent.**

3. Enter task parameters to change the fund used.

4. If you are using **your own library's sandbox**, run the job.

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

Jobs Demo 4: Close Lost Loans

Objective: Close out lost items that were due before in a specific year.

1. Navigate to ADMINISTRATION > Manage Jobs and Sets > Run a Job

2. Select the job, *Close Lost Loans* and associate it with the set you named:
   • Session 1: **Lost Items Due in 2014**
   • Session 2: **Lost Items Due in 2015**

3. Run the job to delete item loans marked as lost

4. If you are using **your own library's sandbox**, run the job.

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

Jobs Demo 5: Update User Information

Objective: Set status of Active users with an specific expiration date to Inactive.

1. Navigate to Administration > Manage Jobs and Sets > Run a Job

2. Select the job, *Update User Information* with the set you named:
   - Session 1**: Active Users Expired in 2014**
   - Session 2**: Active Users Expired in 2015**

3. Configure the job to set the user *Status* to **Inactive**.

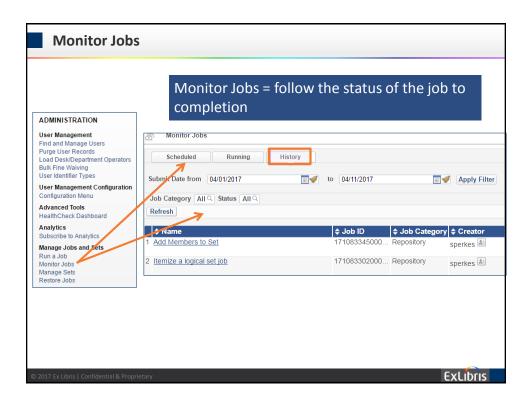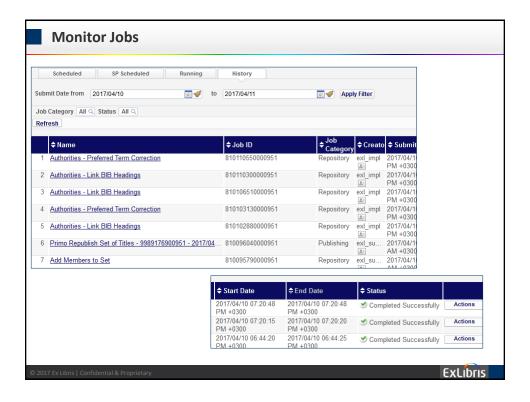4. If you are using **your own library's sandbox**, run the job.

ExLibris

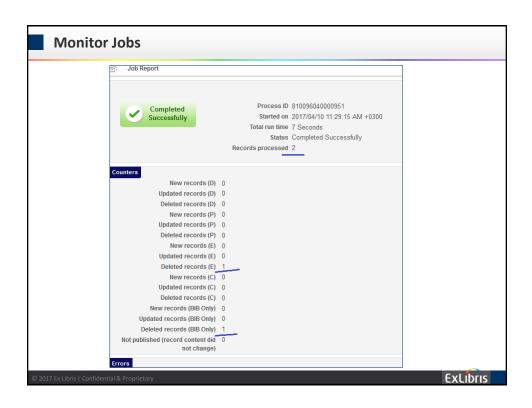### Agenda
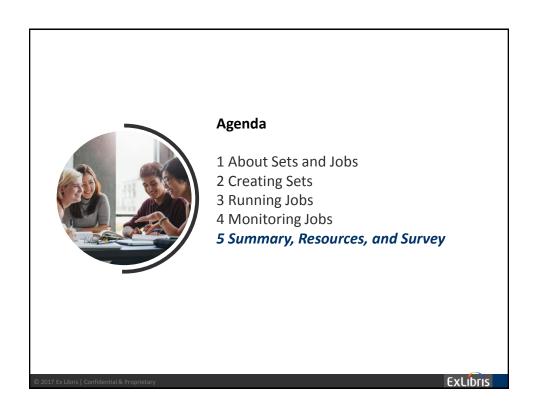
1 About Sets and Jobs
2 Creating Sets
3 Running Jobs
4 Monitoring Jobs
5 Summary, Resources, and Survey

ExLibris

Monitor Jobs

Monitor Jobs = follow the status of the job to completion

ADMINISTRATION

User Management
Find and Manage Users
Purge User Records
Load Desk/Department Operators
Bulk Fine Waiving
User Identifier Types
User Management Configuration
Configuration Menu
Advanced Tools
HealthCheck Dashboard
Analytics
Subscribe to Analytics
Manage Jobs and Sets
Run a Job
Monitor Jobs
Manage Sets
Restore Jobs

Monitor Jobs

| Scheduled | Running | History |

Submit Date from 04/01/2017 to 04/11/2017 **Apply Filter**

Job Category All 🔍 Status All 🔍
Refresh

⬍ Name	⬍ Job ID	⬍ Job Category	⬍ Creator
1 Add Members to Set	171083345000...	Repository	sperkes
2 Itemize a logical set job	171083302000...	Repository	sperkes

ExLibris

Monitor Jobs

| Scheduled | SP Scheduled | Running | History |

Submit Date from 2017/04/10 to 2017/04/11 **Apply Filter**

Job Category All 🔍 Status All 🔍
Refresh

	⬍ Name	⬍ Job ID	⬍ Job Category	⬍ Creator	⬍ Submit
1	Authorities - Preferred Term Correction	810110550000951	Repository	exl_impl	2017/04/1 PM +0300
2	Authorities - Link BIB Headings	810110300000951	Repository	exl_impl	2017/04/1 PM +0300
3	Authorities - Link BIB Headings	810106510000951	Repository	exl_impl	2017/04/1 PM +0300
4	Authorities - Preferred Term Correction	810103130000951	Repository	exl_impl	2017/04/1 PM +0300
5	Authorities - Link BIB Headings	810102880000951	Repository	exl_impl	2017/04/1 PM +0300
6	Primo Republish Set of Titles - 9989176900951 - 2017/04...	810096040000951	Publishing	exl_su...	2017/04/1 AM +0300
7	Add Members to Set	810095790000951	Repository	exl_su...	2017/04/1 AM +0300

⬍ Start Date	⬍ End Date	⬍ Status	
2017/04/10 07:20:48 PM +0300	2017/04/10 07:20:48 PM +0300	✔ Completed Successfully	**Actions**
2017/04/10 07:20:15 PM +0300	2017/04/10 07:20:20 PM +0300	✔ Completed Successfully	**Actions**
2017/04/10 06:44:20 PM +0300	2017/04/10 06:44:25 PM +0300	✔ Completed Successfully	**Actions**

ExLibris

Monitor Jobs

Job Report

✔ Completed Successfully

Process ID 810096040000951
Started on 2017/04/10 11:29:15 AM +0300
Total run time 7 Seconds
Status Completed Successfully
Records processed 2

Counters

New records (D) 0
Updated records (D) 0
Deleted records (D) 0
New records (P) 0
Updated records (P) 0
Deleted records (P) 0
New records (E) 0
Updated records (E) 0
Deleted records (E) 1
New records (C) 0
Updated records (C) 0
Deleted records (C) 0
New records (BIB Only) 0
Updated records (BIB Only) 0
Deleted records (BIB Only) 1
Not published (record content did not change) 0

Errors

ExLibris

Agenda

1 About Sets and Jobs
2 Creating Sets
3 Running Jobs
4 Monitoring Jobs
5 Summary, Resources, and Survey

ExLibris

Summary

During this presentation, you learned how to:

Create and manage sets for which data will be changed

Distinguish between logical and itemized sets

Run jobs using sets to perform a change in data

Monitor jobs to completion

ExLibris

Recommended Knowledge Center Articles

Articles about Sets:

- Managing Search Queries and Sets
- Managing Fulfillment Sets
- Create User Set based on Analytics

Articles about Jobs:

- Overview of Jobs
- Running Manual Jobs on Defined Sets
- Viewing Scheduled Jobs
- Viewing Running Jobs
- Viewing Completed Jobs

49

ExLibris

Additional Resources

- [Technical Seminar Presentations](#)
  (located in the Cross-Product section of the Knowledge Center)

- Additional support resources within the ExLibris Ecosystem:
  - [Ex Libris Support Portal](#)
  - [Idea Exchange](#)
  - System Status Pages: [Single Tenant ENV](#) / [Multi-Tenant ENV](#)
  - [Developer Network](#)
  - [Alma Online Training](#)

ExLibris

Q & A

Any Questions?

ExLibris

Session Survey Evaluation

Please use the following link
to provide feedback on your sessions:

**https://www.surveymonkey.com/r/tec
hsem2017**

52

ExLibris

THANK YOU

ExLibris
a ProQuest Company