



Alma: Working with Sets and Jobs

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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

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.

Agenda

1

About Sets and Jobs

2

Creating and Managing Sets

3

Running Jobs

4

Monitoring Jobs

5

Summary, Resources, and Survey



Agenda

1 About Sets and Jobs

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

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

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

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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



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Agenda

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

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



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

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Agenda

- About Sets and Jobs
- ***Creating and Managing Sets***
 - ***Creating Sets***
 - Managing Sets
- Running Jobs
- Monitoring Jobs
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Manage Sets

Manage Sets

My Sets Public Sets All Sets

Content Type: All Find: in: Name

Add Set 1 - 7 of 7 Sets Columns Tools

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

Add Set Logical Itemized

1 - 7 of 7 Sets Tools Back

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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

Private All Titles

Creation date Authorities

Updated by Collections

Set ID Digital files

Add Contents from File to Set

File Electronic collections

Electronic portfolios

Electronic titles

PO line

Physical items

Physical titles

User

Vendor

Set type Itemized

Status ☒ Active ☐ Inactive

Created by Ex Libris

Content Origin Institution only

The maximum file size is 10 MB.

Cancel Add Members to Set Save

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Add Members to Itemized Set

The screenshots illustrate the steps to add members to an itemized set:

- Search 1:** Find Physical items where Keywords contains laughter. Results show "dangerous laughter : thirteen stories / Steven Millhauser." with 1 selected.
- Search 2:** Find Physical items where Keywords contains humo*. Results show "the librarian's book of lists / edited by George M. Eberhart." with 1 selected.
- Search 3:** Find Physical items where Keywords contains antics. Results show "wonderful antics : a book of art, music, and theater jokes / by Jill L. Donahue : illustrated by Amy Bailey Muehlenhardt." with 1 selected.

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Modify Itemized Set

The Manage Sets interface displays the following table:

Active	Name	Type	Content Type	Creation Date	Actions
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, Members, Duplicate, Combine sets, Filter set, Delete
4	Physical Items with Location "None"	Itemized	Physical titles	04/05/2017 15:52:44	
5	Psychology print books > 2010	Logical	Physical titles	04/05/2017 13:50:39	
6	Vendors to Contact with IP Range Updates	Itemized	Vendor	04/05/2017 15:54:55	
7	Yankee: POLs In Review	Logical	PO line	04/05/2017 15:54:24	

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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.

Demo 1

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Add Logical Set

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Tasks Analytics Currently at: Main Library - Main Library...

Welcome Back to Home Page

Manage Sets

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	Actions
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 EDT	Actions
4	Physical Items with Location "None"	Itemized	Physical titles	04/05/2017 15:52:44 EDT	Actions
5	Psychology print books > 2010	Logical	Physical titles	04/05/2017 13:50:39 EDT	Actions
6	Vendors to Contact with IP Range Updates	Itemized	Vendor	04/05/2017 15:54:55 EDT	Actions
7	Yankee: POs In Review	Logical	PO line	04/05/2017 15:54:24 EDT	Actions

Add Set 1 - 7 of 7 Sets Tools

Logical Itemized

Receive Create Invoice Review Approve Waiting for Payment

Shelf Report Import Upload Single Record From File Monitor and View Imports

Fulfillment Configuration Utility Create Fulfillment Sets Bulk Change Due Dates View Restore Request Jobs View Overdue and Lost Loan Jobs Offline Circulation

Run a Job Monitor Jobs Manage Sets Restore Jobs

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Create Logical Set

Set Details

Set name: Set type: Logical

General Information

Set name: logical set with All Titles = all things economic

Description: logical set with All Titles = all things economic

Note:

Set content type: All Titles

Status: ☒ Active ☐ Inactive Private: ☐ No ☒ Yes

Created by: Ex Libris Status date: 12/23/2014 09:32:59 AM Updated by: Ex Libris

Repository Search

Find: All titles where Keywords contains economic Go

Limit results to: Inventory

Primary Sort by: Rank Secondary Sort by: Rank

1 - 20 of 2,289 Records

1. **Economic bulletin**

Journal (Berlin) : Springer-Verlag Heidelberg Print began with new ser. v. 1, no. 1 (Jan. 1964.)

ISSN: 0343-754X

Subject: Economic history Periodicals. -- Germany (West) Periodicals. Economic conditions -- Germany (East) Periodicals. Economic conditions

Language: English Medium Type: [electronic resource] Record number: (CONSER) 2004233396

Availability: Electronic version at SpringerLink (Springer standard collection): Full Text

Edit | More info

2. **Economic botany**

Journal (New York : New York Botanical Garden Vol. 1, no. 1 (Jan./Mar. 1947-))

ISSN: 0013-0001

Subject: Botany. Economic Periodicals. -- Agriculture Periodicals. -- Botany economics and others

Language: English Medium Type: [electronic resource] Record number: (CONSER) 2007233721

Availability: Electronic version at JPLA Springer Link Journals 2014: Full Text

Electronic version at SpringerLink (Springer standard collection): Full Text

Edit | More info

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Modify Logical Set

Manage Sets

My Sets Public Sets All Sets

Filter: All Find: In: All Go

1 - 9 of 9 Sets

Active	Name	Type	Contents type	Creation Date	Actions
<input checked="" type="checkbox"/>	display shelves - May - World Day of Laughter - physical items	Itemized	Physical items	12/22/2014 20:28:52 IST	Actions
<input checked="" type="checkbox"/>	itemized set - digital titles	Itemized	Digital titles	12/22/2014 19:58:57 IST	Actions
<input checked="" type="checkbox"/>	itemized set - physical items - keyword = geology - move to Science Library	Itemized	Physical items	12/22/2014 19:16:48 IST	Actions
<input checked="" type="checkbox"/>	logical set with All Titles = all things economic	Logical	All Titles	12/23/2014 16:45:16 IST	Actions
<input checked="" type="checkbox"/>	logical set with electronic portfolios = nursing	Logical	Electronic portfolios	12/22/2014 20:00:09 IST	Edit Catalog set
<input checked="" type="checkbox"/>	logical set with physical items in Main Library, keyword = physiology	Logical	Physical items	12/22/2014 19:23:12 IST	Results Duplicate Itemize Combine Sets Delete
<input checked="" type="checkbox"/>	move titles with keyword = crime to Law Library	Logical	Physical items	12/05/2014 15:51:41 IST	
<input checked="" type="checkbox"/>	move titles with subject = criminal behavior to Law Library	Logical	Physical items	12/15/2014 16:26:45 IST	
<input checked="" type="checkbox"/>	shades of grey for display - All Titles keyword	Itemized	All Titles	12/22/2014 19:36:45 IST	

Repository Search

Set name: logical set with All Titles = all things economic

Set type: logical

Set content type: All Titles

Current Search: All Titles where All Titles (Keywords contains keywords "economic")

Limit results to: Inventory

Primary Sort by: Rank Secondary Sort by: Rank

1 - 20 of 2,769 Records

1. **Economic perspectives**

Journal text; computer; online resource (Chicago, Ill. : Research Dept of the Federal Reserve Bank of Chicago Print began with vol. 13, issue 1 (Jan./Feb. 1989).)

ISSN: 1048-115X

Subject: Finance Periodicals. United States -- Banks and banking Periodicals. United States -- United States Periodicals. Economic conditions 1981- and others

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Change Query for Logical Set

The screenshot displays the ExLibris Advanced Search interface. The top section, 'Advanced Search', shows a search for 'econom*' under the 'Find: All titles' criterion. The bottom section, 'Repository Search', shows the results for the logical set 'All Titles where All titles (Keywords contains keywords "econom*")'. The results list includes:

- 1. [Madmen, Intellectuals, and academic scribblers the economic engine of political change / Wayne A. Leighton and Edward J. López.](#)
Book By Leighton, Wayne A., (Stanford, Calif. : Stanford Economics and Finance an imprint of Stanford University Press 2013.) ISBN: 9780804783965 (e-book) and others
Subject: Political planning Economic aspects. -- Policy sciences Economic aspects. -- Political entrepreneurship, and others
Language: English Medium Type: [electronic resource] Record number: (OCoLC)ocn823654660
Availability: Electronic version at Books 24x7, Inc. : Full Text
View full text | Order | Request | Document Delivery | Add to reading list | Portfolio List | More info
- 2. [Madmen, Intellectuals, and academic scribblers: the economic engine of political change / Wayne A. Leighton and Edward J. López.](#)
Book text; unmediated; volume By Leighton, Wayne A., (2013)
ISBN: 9780804780971 (cloth : alk. paper) and others
Subject: Political planning Economic aspects. -- Policy sciences Economic aspects. -- Political entrepreneurship, and others
Language: English Record number: (OCoLC)ocn788271892
Availability: Physical version at GRAD: grad; JF1525.P6 L45 2013 (1 copy, 1 available)
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | Items | More info
- 3. [Journal of business economics and management.](#)

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

Demo!

Create Logical PO Line Set

Set Details 1 2 Cancel Next

Set name - Set type Logical

General Information

Set name * Bookhouse - PO Lines with status of Sent

Description Bookhouse - PO Lines with status of Sent

Note

Set content type * PO line

Status ☒ Active ☐ Inactive

Private ☐ No ☒ Yes

Status date 12/23/2014 18:57:27 IST

Created by Ex Libris Updated by Ex Libris

Search for PO Line Back

Set name Bookhouse - PO Lines with status of Sent Set type logical Set content type PO Lines

[Simple Search](#)

Advanced Search

Find in Additional PO Line Reference

Workflow Equals Sent

Material Supplier Equals BKHS

Material Supplier Contains Keywords

Account

Access Provider Equals

Acquisition Method Equals

Fund Code Equals

Fund Name Contains Keywords

License Code Equals

Rush Equals

Cancellation restriction Equals

Go

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Save Query for Logical PO Line Set

Reporting Code: Equals

PO Line Type: Equals

Go

1 [A philosophy of evil / Lars Svendsen ; translated by Kerri A. Pierce., Champaign, IL : Dalkey Archive Press., 2010., 2009050785, ISBN](#)

Order/Line status: - / Sent

MMS ID: 991353170000541

Assigned to:

Type: Print Book - One Time PO line owner: Main Library Standard number: 2009050785 Order/Line: - / 2788

Copies: Main Library - Stacks (1) Total price: 34.95 USD Funds: M: Social Sciences (100.0%) (2012/2013)

Vendor/Account: The Bookhouse, Inc. / The Bookhouse, Inc. BKHS Vendor reference ID: - Expected delivery: -

Receiving note: -

Items already exist in the repository, Reporting code is missing

[Edit](#) | [Change Bib Reference](#) | [Cancel](#)

2 [Encyclopedia of case study research / edited by Albert J. Mills, Gabrielle Durepos, Elden Wiebe., Los Angeles : SAGE Publications., c2010., 2009012391, ISBN](#)

Order/Line status: - / Sent

MMS ID: 991354220000541

Assigned to:

Type: Print Book - One Time PO line owner: Main Library Standard number: 2009012391 Order/Line: - / 2724

Copies: Main Library - Reference (1) Total price: 350.00 USD Funds: M: Humanities (100.0%) (2012/2013)

Vendor/Account: The Bookhouse, Inc. / The Bookhouse, Inc. BKHS Vendor reference ID: - Expected delivery: -

Receiving note: -

Reporting code is missing

[Edit](#) | [Change Bib Reference](#) | [Cancel](#)

3 [Encyclopedia of group processes & intergroup relations / John M. Levine, Michael A. Hogg, editors., Thousand Oaks, Calif. : SAGE Publications., c2010., 2009026419, ISBN](#)

Order/Line status: - / Sent

MMS ID: 991354210000541

Assigned to:

Type: Print Book - One Time PO line owner: Main Library Standard number: 2009026419 Order/Line: - / 2725

Copies: Main Library - Reference (1) Total price: 375.00 USD Funds: M: Science (100.0%) (2012/2013)

Vendor/Account: The Bookhouse, Inc. / The Bookhouse, Inc. BKHS Vendor reference ID: - Expected delivery: -

Receiving note: -

Reporting code is missing

[Edit](#) | [Change Bib Reference](#) | [Cancel](#)

4 [Making human geography / Kevin R. Cox., New York : The Guilford Press., 2014, 9781462512836 \(paperback : alk. paper\), ISBN](#)

Order/Line status: Sent / Sent

MMS ID: 9925641100521

Assigned to:

Type: Print Book - One Time PO line owner: Science Library Standard number: 9781462512836 (paperback : alk. paper) Order/Line: PO: 6920 / PO: 7525

Copies: Science Library - Science Stacks (1) Total price: 61.00 USD Funds: M: Social Sciences (100.0%) (07/01/2014 - 06/30/2015)

Vendor/Account: The Bookhouse, Inc. / The Bookhouse, Inc. BKHS Vendor reference ID: - Expected delivery: 10/09/2015

Receiving note: - Sent date: 10/09/2015

[Edit](#) | [Change Bib Reference](#) | [Cancel](#)

Back Save

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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

Demo

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Create Fulfillment Set

Manage Fulfillment Sets

Cancel Save View My Sets

Name * Lost Items
Description * Lost Items

Note

Due date after
Due date before
Status date after
Status date before
Loan status Lost

The Create Fulfillment Set link is under the FULLFILLMENT menu.

Cancel Save View My Sets

My Sets Public Sets All Sets

Content Type All

Find: In: Name Go

Add Set 1 - 10 of 10 Sets Columns Tools

	Active	Name	Type	Content Type	Creation Date	Actions
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	✓	Display Shelf List May: World Laughter Day	Itemized	All Titles	04/05/2017 16:31:35 EDT	Actions
4	✓	Graduate Library Bib and Inventory Records	Logical	Physical titles	04/05/2017 15:41:46 EDT	Actions
5	✓	Lost Items Set	Itemized	Physical items	04/10/2017 09:47:40 EDT	Actions
6	✓	Physical Items with Location "None"	Itemized	Physical titles	04/05/2017 15:52:44 EDT	Edit Members Duplicate Combine sets Create titles set Delete
7	✓	Psychology print books > 2010	Logical	Physical titles	04/05/2017 13:50:35 EDT	Actions
8	✓	User defunct report	Itemized	User	04/06/2017 14:47:39 EDT	Actions
9	✓	Vendors to Contact with IP Range Updates	Itemized	Vendor	04/05/2017 15:54:55 EDT	Actions
10	✓	Yankee: POLs In Review	Logical	PO line	04/05/2017 15:54:24 EDT	Actions

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
Create Fulfillment Set

Physical Items

Set name: Lost Items Set Set type: itemized Set content type: Physical Items

Limit results to:
No facets available.

[Add Members](#) 1 - 5 of 5 Records [Tools](#)

<input type="checkbox"/>		<p>Form, space, and vision: discovering design through drawing. Foreword by Herbert Read. Book By Collier, Graham. (Englewood Cliffs, N.J., Prentice-Hall [1963]) Barcode: 75429 Library: Main Library Process type: Lost Due Date: 08/30/2013 Permanent Location: Stacks Call Number: NC730 .C6 Call Number Type: Library of Congress classification Status: Item not in place Material Type: Book</p> <p>Edit Item Holdings Items Request Work Order Withdraw Remove More info</p>
<input type="checkbox"/>		<p>All things / Jorie Graham. Book By Graham, Jorie. ([Iowa City] : Emyprean Press University of Iowa 2002.) Barcode: 13157299 Library: Main Library Process type: Lost Due Date: 08/30/2013 Permanent Location: Stacks Call Number: PS3557 R214 A44 2002 Call Number Type: Library of Congress classification Status: Item not in place Material Type: Book</p> <p>Edit Item Holdings Items Request Work Order Withdraw Remove More info</p>
<input type="checkbox"/>		<p>On speed : the many lives of amphetamine / Nicolas Rasmussen. Book By Rasmussen, Nicolas. (New York : New York University Press c2008.) Barcode: 15055028 Library: Main Library Process type: Lost Due Date: 04/26/2009 Permanent Location: Stacks Call Number: RM666 A493 R37 2008 Call Number Type: Library of Congress classification Status: Item not in place Material Type: Book</p> <p>Edit Item Holdings Items Request Work Order Withdraw Remove More info</p>
<input type="checkbox"/>		<p>The art and craft of drawing : a study both of the practice of drawing and of its aesthetic theory as understood among different peoples and at different epochs; especial reference being made to the construction of the human form from the practical draughtsman's point of view. Book By Blake, Vernon. ([New York] : Dover Publications [1951]) Barcode: 01501 Library: Main Library Process type: Lost Due Date: 08/30/2013 Permanent Location: Stacks Call Number: NC710 B55 1951 Call Number Type: Library of Congress classification Status: Item not in place Material Type: Book</p> <p>Edit Item Holdings Items Request Work Order Withdraw Remove More info</p>

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Set Demo 4: Create Fulfillment Set

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

- Navigate to FULFILLMENT > Advanced Tools > Create Fulfillment Sets
- Create an **itemized** called:
 - Session 1: **Lost Items Due in 2014**
 - Session 2: **Lost Items Due in 2015**
- Use these parameters:
 - Session 1:
 - Loan status: **Lost**
 - Due date: **2014**
 - Session 2:
 - Loan status: **Lost**
 - Due date: **2015**

Demo!

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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



Demo

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Use Analytics to Create User Set With Complex Criteria

- 1 Design and download analytics report

	A	B	C
1			
2			
3	Primary Identifier	Expiry Date	Status
4	bernardo.gomez	12/21/2016	Active
5	bonita.bryan	12/21/2016	Active

- 2 Format data for upload into set

	A
1	USERNAME
2	bernardo.gomez
3	bonita.bryan
4	brian.thompson
5	christelle.vial

- 3 Create and populate set

Set Details

Cancel Add Members to Set Save

General Information

Set name * Active Users Expiring before June 2017

Description

Note

Set content type * User

Private ☒ Yes ☐ No

Creation date 04/06/2017 16:04:02 EDT

Updated by Ex Libris

Set ID -

Set type Itemized

Status ☒ Active ☐ Inactive

Created by Ex Libris

Content Origin Institution only

Add Contents from File to Set

File

the maximum file size is 10 MB.

Cancel Add Members to Set Save

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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	Actions
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 EDT	Actions
4	Physical Items with Location "None"	Itemized	Physical titles	04/05/2017 15:52:44 EDT	Actions
5	Psychology print books > 2010	Logical	Physical titles	04/05/2017 13:50:39 EDT	Actions
6	Vendors to Contact with IP Range Updates	Itemized	Vendor	04/05/2017 15:54:55 EDT	Actions
7	Yankee: POLs In Review	Logical	PO line	04/05/2017 15:54:24 EDT	Actions

Add Set 1 - 7 of 7 Sets Tools [Back](#)

Itemized Sets


- Edit
- Catalog set
- Members**
- Duplicate
- Combine sets
- Filter set
- Delete

Logical Sets

- Edit
- Catalog set
- Results**
- Duplicate
- Itemize**
- Combine sets
- Filter set
- Delete

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Agenda



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

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Run a Job

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

Run a job = perform a specific action or task for a set of records

Run a Job - Select Job to Run

Type	All	Source type	All
Job List	Name	Description	Content Type
1	Withdraw items	Withdraw physical items task.	Physical item
2	Withdraw digital representations	Withdraw digital representations task.	Representation
3	Update PO Lines Workflow	Update PO Lines Workflow for PO Line set	Purchase order line
4	Update PO Lines transactions	Update PO Lines transactions for PO Line set	Purchase order line
5	Update PO Lines Information	Update PO Lines Information for PO Line set	Purchase order line
6	Update/Notify Users	Update/Notify Users for user set	User
7	Unlink bib records from authority records	Unlink bib records from authority records	Bibliographic title
8	Unimarc Set Bib Records Cataloging Level	Unimarc Set the MMS records cataloging level	Bibliographic title
9	Unimarc Set Authority Records Cataloging Level	Unimarc Set the Authority records cataloging level	Authority MMS
10	Unimarc Bib Re-sequence And Clear empty fields	Unimarc Bib Re-sequence And Clear empty fields	Bibliographic title
11	Unimarc Bib Re-sequence	Unimarc Bib Re-sequence	Bibliographic title
12	Unimarc Bib normalize on save	Normalize Unimarc Bib while saving	Bibliographic title
13	Unimarc Bib Initial Normalization	Initial normalization for Unimarc Bib record	Bibliographic title
14	Thumbnail generation	Generate thumbnail for each digital file in the set	Digital files
15	The process from the professionals group	The process from the professionals group for WC	Bibliographic title

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Select Job

Run a Job - Select Job to Run

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

Job List

Type

All

Source type

All

Find:

in: All

Go

1 2 3 4 5

Go

1 - 20 of 40 Task Chains

Tools

All

Change PO line

Export

Information Update

Item Description

Move Items

Withdraw

Loan

Marc 21 authority normalization

Marc 21 Bib normalization

Marc 21 management tags

Metadata Management

Update PO lines Workflow

Publishing

Request

Thumbnail

Update PO line information

Update PO line transactions

Update User Information

System Defined

User Defined

Information Update

Physical items task.

Physical item

Withdraw

Withdraw digital representations task.

Representation

Withdraw

User information for user set

User

Update User Information

PO Lines Workflow for po line set

Purchase order line

Update PO lines Workflow

PO Lines transactions for po line set

Purchase order line

Update PO line transactions

PO Lines Information for po line set

Purchase order line

Update PO line information

Bib records from authority records

Bibliographic title

Metadata Management

MMS as synchronized or non-synchronized with national catalog

Bibliographic title

Marc 21 Bib normalization

MMS records for synchronization or no-synchronization with national catalog (OCLC)

Bibliographic title

Marc 21 Bib normalization

MMS records as suppressed or non-suppressed from discovery

Bibliographic title

Marc 21 Bib normalization

Bib Field 999

Bibliographic title

Marc 21 Bib normalization

Item description

Physical item

Item Description

Republish Set of Titles

Publishing bulk

Publishing

Item information and initiate moving a set of physical items to a location.

Physical item

Move Items

CZ Records from CN members task.

CN import CZ members

CN_IMPORT_CZ_RECORDS

members task

Identifying Brief Records

Calculates if a record is brief or not

Bibliographic title

Marc 21 management tags

Holding OCLC Republish Set of Titles

Holding OCLC Republish Set of Titles

Publishing bulk

Publishing

Export Physical Items Labels

Export physical items labels for printing

Physical item

Export

Export Physical Items

Export Physical Items

Physical item

Export

Export Inventory Entities

Export inventory records

Digital title

Export

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Select Set, Enter Parameters

Run a Job - Select Job to Run

1 2 3 4 5 Cancel Next

Job List

Type: Move Items Source type: All Find: In: All Go

1 - 1 of 1 Task Chains Tools

	Name	Description	Content Type	Type
1	Move physical items	Update item information and initiate moving a set of physical items to a new location.	Physical item	Move Items

Cancel Next

Run a Job - Select Set

1 2 3 4 5 Back Cancel Next

Content Type: All Find: In: All Go

1 2 3 4 5 1 - 20 of 25 Sets Tools

	Name	Type	Content Type	Create Date
1	active names	Logical	Physical titles	04/25/2014 09:52:29 AM
2	Developing technology physical items in Graduate library stacks	Logical	Physical titles	07/02/2014 04:02:55 PM

Run a Job - Enter Task Parameters

1 2 3 4 5 Back Cancel Next

Task Parameters: Move Item

New library: Science Library New location: Science Stacks

Change Type: Permanent New item policy:

Sent from library: Graduate Library Sent from desk: Graduate Library Circulation

Print Transit Letter: No Yes

Back Cancel Next

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Name Job, Confirm Details, Submit

Run a Job - Job Details and Schedule

1 2 3 4 5 Back Cancel Next

General Information

Job Name: Move physical items - Developing technology physical items in Graduate library stacks - 12/29/2014 12:47:

Schedule Job

Tools

	Schedule
1	As soon as possible

Back Cancel Next

Run a Job - Review and Confirm

1 2 3 4 5 Back Cancel Submit

General Information

Job Name: Move physical items - Developing technology physical items in Graduate library stacks - 12/29/2014 12:47:54 PM

Set Information

Set ID: 92017360000541

Name: Developing technology physical items in Graduate library stacks

Scheduling

Schedule: As soon as possible

Task Parameters: Move Item

New library: Science Library New location: Science Stacks

Change Type: Permanent New item policy:

Sent from library: Graduate Library Sent from desk: Graduate Library Circulation

Print Transit Letter: No

Back Cancel Submit

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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.

Demo!

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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.

Demo!

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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.

Demo!

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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.

Demo!

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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.

Demo

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Agenda

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

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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

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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	2017/04/10 PM +0300
2 Authorities - Link BIB Headings	810110300000951	Repository	exl_impl	2017/04/10 PM +0300
3 Authorities - Link BIB Headings	810106510000951	Repository	exl_impl	2017/04/10 PM +0300
4 Authorities - Preferred Term Correction	810103130000951	Repository	exl_impl	2017/04/10 PM +0300
5 Authorities - Link BIB Headings	810102880000951	Repository	exl_impl	2017/04/10 PM +0300
6 Primo Republish Set of Titles - 9989176900951 - 2017/04...	810096040000951	Publishing	exl_su...	2017/04/10 AM +0300
7 Add Members to Set	810095790000951	Repository	exl_su...	2017/04/10 AM +0300


Start Date	End Date	Status	Actions
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

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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)	<u>1</u>
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)	<u>1</u>
Not published (record content did not change)	0

Errors

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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

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](#)

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](#)

Q & A

Any Questions?





Session Survey Evaluation

Please use the following [link](#) to provide feedback on your sessions:

<https://www.surveymonkey.com/r/techsem2017>

