

Alma Essentials: Resource Management – Sets and Jobs

Training Materials

- [Sets and Jobs](#)
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Hands-on Exercises

Roles needed for these exercises: Repository Manager/Administrator, Requests Operator

Using your sandbox, **sign in as AlmaUser01** (or any account with the roles indicated above) and complete the following exercises. 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.

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

1. Use the persistent search box to perform an **All titles Advanced Search** with the criteria **Has inventory Equals No**.
2. Click **Save and Filter 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 **Content** to view the members of the logical set.

Exercise #2: Create an itemized set of physical items

1. **Admin > Manage Jobs and Sets > Manage Sets**
2. Click **Create Itemized Set**.
3. On the Itemized Set Details screen:
 - a. Enter **Set name**.
 - b. **Set content type**: choose **Physical items**.
 - c. **Private**: uncheck the box if you want the set to be viewable by your colleagues who have appropriate roles.
4. Click **Create**.

5. Use the persistent search box to run a search query of your choice.
6. Select a few items to add to the set and click **Add Selected**.
7. Click **Done** to save the set.
8. To view the members of the itemized set, click **Content** from the Manage Sets screen.

Exercise #3: Run a job on the set of physical items

1. **Admin > Manage Jobs and Sets > Run a Job**
2. Select a job that will batch update the set, e.g., **Change physical items information**.
3. Click **Next**.
4. Select the set that was created in Exercise #2.
5. Click **Next**.
6. On the **Run a Job - Enter Task Parameters** screen, enter the changes you want to make to all the records in the set. For example, under **Change notes information**:
 - a. Check the box next to **Internal note 1**.
 - b. Add some text in the **Internal note 1** field.
 - c. Change **Condition** to **If field empty**.
 - d. This will add an Internal note 1 to any items that do not currently have text in that field in the item record.
7. Click **Next**.
8. Review the job details and click **Submit** to run the job.

Exercise #4: Create a combined set of items in a particular library that are lost and were due back more than six months ago

1. Create a Fulfillment Set of all lost items that were due more than six months ago:
 - a. Go to **Fulfillment > Advanced Tools - General > Create Fulfillment Sets**.
 - b. Enter a **Name**: Lost for 6 months.
 - c. Enter a **Description**.
 - d. Select a **Loan status** of **Lost**.
 - e. Select a **Due date before** value that is six months in the past.
 - f. Click **Save**.
2. Create a logical set of items located at a specific library:
 - a. Use the persistent search box to perform a **Physical items Advanced Search** with the criteria **Library (Holdings) Equals** [Select the library of your choice].
 - b. Click **Save Query**.
 - c. Name the set "[Library Name] Items" and click **Save**.
3. Combine the above sets to create a set of lost items due more than six months ago that are owned by the specified library:

- a. Go to **Admin > Manage Jobs and Sets > Manage Sets**
- b. Right click on the set called "Lost for 6 months" and select **Combine Sets**.
- c. Choose the **And** operation.
- d. Under **With**, select the "[Library Name] Items" set.
- e. Edit the **Set name** and **Description** as desired.
- f. Click **Combine**.
- g. A job will run to combine the sets. When the job is complete, click **Refresh** on the Manage Sets page and locate the combined set.
- h. Note that the combined set is now an **Itemized** set.
- i. To view the members of the combined set, click **Content**.

Note: to combine sets of records, each set needs to be the same content type; for example, you can't combine a title set with an item set.