

FULFILLMENT: SETS & JOBS

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Today's Agenda

- Jobs (& Permissions)
- Sets (& Permission)
- Fulfillment Specific Sets
- Running a Manual Job
- Fulfillment Administrator Tasks
- Resending Notices
- Q & A

What are jobs?

Jobs are batch processes that run on sets. They are the actions that take place to the selected group of records.

- Manual Jobs
- Scheduled Jobs

Jobs Permissions

To run a manual job, you must have roles that enable you to a) access the Run a Job – Select a Job to Run page, and b) run the job.

Roles to Access the Jobs page: Acquisitions Administrator, Catalog Administrator, Catalog Manager, Digital Inventory Operator, Digital Inventory Operator Extended, Fulfillment Administrator, General System Administrator, Purchasing Manager, Purchasing Operator, Repository Administrator, Repository Manager, Repository Operator, Requests Operator, User Administrator, User Manager

What are sets?

A set is a collection of items, such as users or the results of a repository search. Sets may be used for publishing metadata in bulk, moving a group of records, or to run jobs.

Itemized vs. Logical Sets

- Itemized – Individual items, selected or uploaded by the librarian
- Logical – A saved search query, which is run every time the set is referenced.

How do I create an logical set?

- Admin > Manage Jobs and Sets > Manage Sets
- + Add Set → Logical
- Name the set
- Choose the Set Content Type (e.g. Users / Physical Titles)
- Click Next
- Complete the Repository Search

Logical Set Example

Physical titles ▾ LC Call Number ▾ LB1033 ✕ ⬆ ▾ 🔍 Advanced ▾

Physical Titles (1 - 20 of 66) [LB1033](#) Cancel Back Save

Sort by : Rank ▾ Secondary Sort by : Rank ▾ Expand ▾ 🔗 ⚙️

User Search Oddity

- The search bar will still let you choose Physical items, even though you shouldn't.
- The search bar does separate from the repository search block.

The screenshot shows a user search interface. At the top, there is a search bar with a dropdown menu set to 'Physical titles' and a search button. Below the search bar, there is a section titled 'Find and Manage Users' with a 'Back' button and a 'Save' button. Below this section, there is a dropdown menu with the text 'TEST' and a downward arrow. Below the dropdown menu, there are two fields: 'Set type' with the value 'logical' and 'Set content type' with the value 'User'.

How do I create an itemized set?


- Admin > Manage Jobs and Sets > Manage Sets
- + Add Set → Itemized
- Name the set
- Choose the Set Content Type (e.g. Users / Physical Titles)
- Choose an option:
 - a. Upload a file*
 - b. Add Members (this allows you to search)*

Itemized Set Example

Physical titles ▾ LC Call Number ▾ TX ✕ 🏠 🔍 Advanced ▾

Physical Titles (1 - 20 of 1,177) TX Add Selected Back Done

Select All Sort by : Rank ▾ Secondary Sort by : Rank ▾ Expand ▾ 🔗 ⚙️

1  **To Russia with fries / George Cohon, with David Macfarlane.** Linked Data Display in Discovery

Book By Cohon, George, (Toronto, Ont. : M & S ©1997.)

Subject: McDonald's Restaurants of Canada Limited Cohon, George. Cohon, George,--1937- and others

Language: English

ISBN: 0771021968 and others

Record number: ocm38566394-01suny_network

Update Date: -

● Physical (1) Other details

Fulfillment Specific Sets

To create itemized physical item sets based on their loan status:

1. Fulfillment
2. Create Fulfillment Sets
3. Enter the details
4. Click Save

Who can create sets?

Your permissions depend on your role. See the documentation for more information:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets)

Running a Manual Job

- Admin → Run a Job
- Choose job to run

ABOVE ALL, READ THE DOCUMENTATION.

Fulfillment Administrator Tasks

Like Sets and Jobs, but not exactly....



Bulk Change Due Dates

Bulk Change Due Dates

Cancel

Administrative Change Due Date

Library * **Do Not Use**

Location

Material Type

User Group

From Due Date *

At(HH:MM)

To Due Date *

At(HH:MM)

New Due Date *

At(HH:MM)

Change Bulk Due Date

Refresh

Change Circulation Desk

Fulfillment Administrator can move all requests from one Circ Desk to another.

- Fulfillment → Transfer Request

Resend Notices

Fulfillment Administrator can re-send notices.

- Fulfillment → Resend Printouts/Emails

User Managers can re-send specific notices:

- Manage Patron Services → Full User Record
- Attachment Tab → Row Actions → Resend

Example of Attachments Tab with Resend Option

General Information | Contact Information | Identifiers | Notes | Blocks | Fines/Fees | Statistics | Attachments | Proxy For | History

1 - 20 of 73

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status	
1 ResendNotificationL...	NOTIFICATION_EMAIL	1.6kb	webbh	05/07/2019 11:09:58 EDT	-	-	Uploaded	...
2 FulLoanReceiptLetter...	NOTIFICATION_EMAIL	3.0kb	webbh	04/29/2019 10:55:17 EDT	-	-	Upload	View Edit Delete Download Resend notification
3 FulPlaceOnHoldShelf...	NOTIFICATION_EMAIL	2.9kb	webbh	04/29/2019 10:52:53 EDT	-	-	Upload	
4 FulCancelRequestLet...	NOTIFICATION_EMAIL	2.6kb	System	04/26/2019 15:57:00 EDT	-	-	Upload	

QUESTIONS?

