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 Noticies
- 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

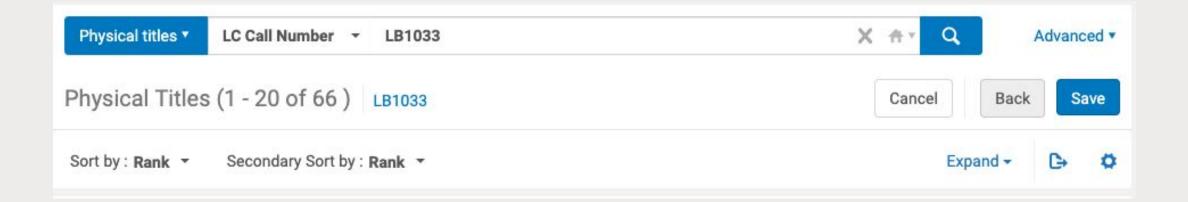
 Itemized – Individual items, selected or uploaded by the librarian

 Logical – A saved search query, which is run every time the set is referenced.

How do I create an logical set?

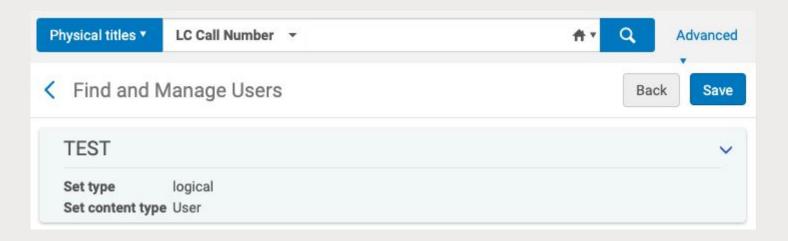
- Admin > Manage Jobs and Sets > Manage Sets
- + Add Set → Logical
- Name the set
- Choose the Set Content Type (e.g. Users / Physical Titles)
- Click Next
- Complete the Repository Search

Logical Set Example



User Search Oddity

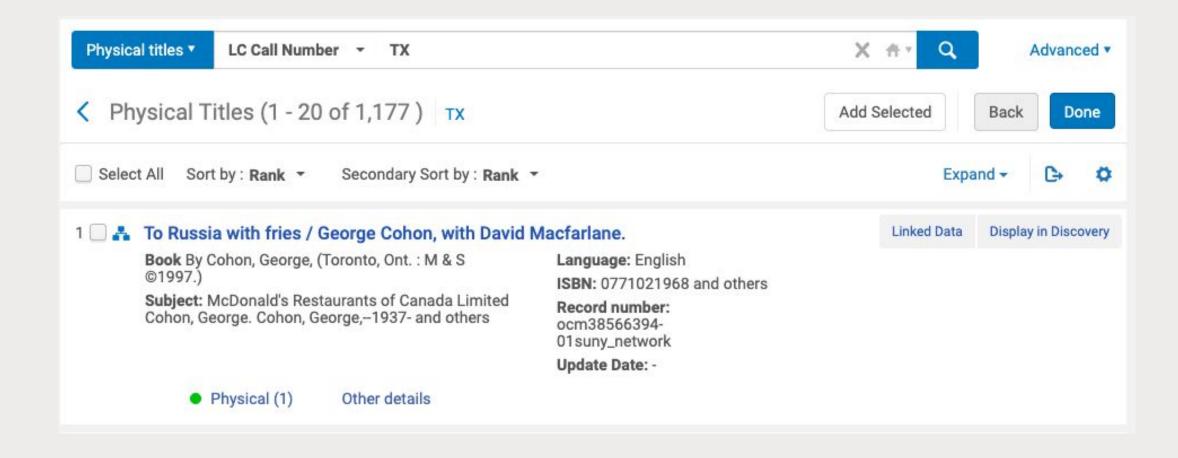
- The search bar will still let you choose Physical items, even though you shouldn't.
- The search bar does separate from the repository search block.



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



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

Running a Manual Job

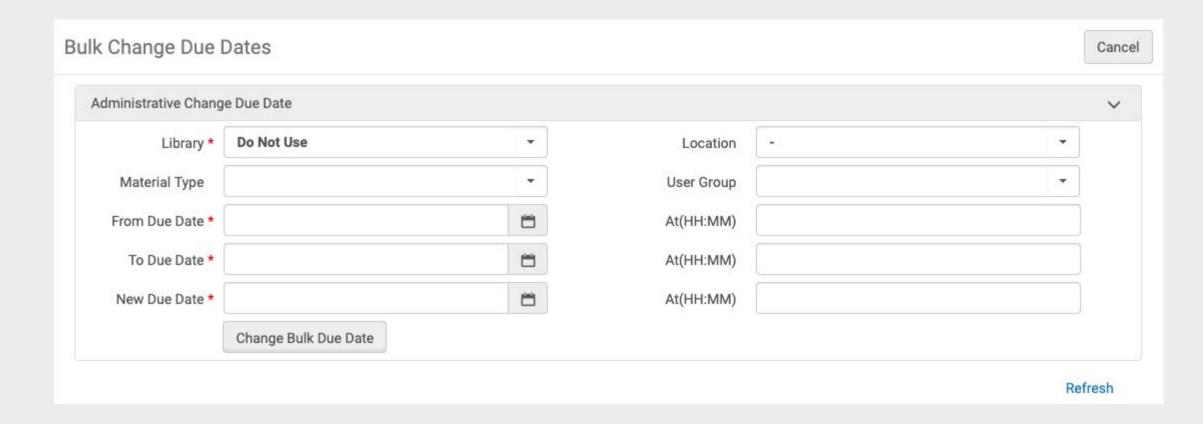
- Admin → Run a Job
- Choose job to run

ABOVE ALL, READ THE DOCUMENTATION.

Fulfillment Administrator Tasks

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

Bulk Change Due Dates



Change Circulation Desk

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

■ Fulfillment → Transfer Request

Resend Notices

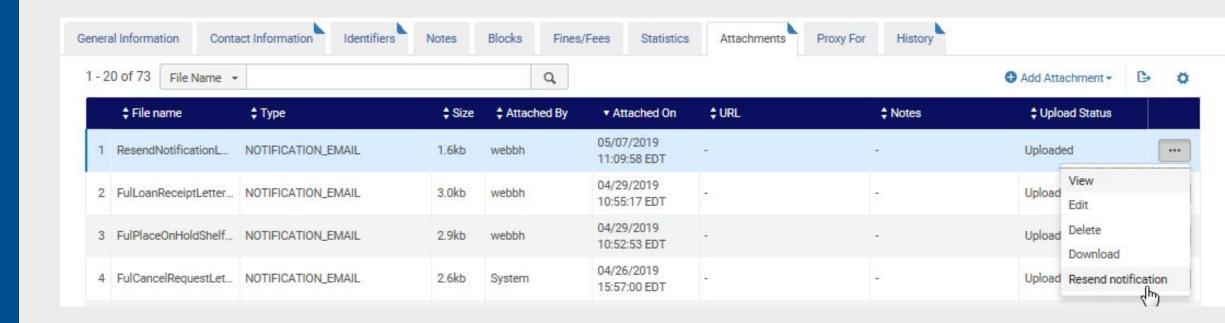
Fulfillment Administrator can re-send notices.

■ 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



QUESTIONS?