



Creating Itemized Item Sets in Alma

An Itemized Set in Alma is a list of resources that has been created by selecting specific records (as opposed to a logical set that adds all records to a set that meet a search logic). An itemized set may be used for a specific purpose, such as to Run a Job to “Withdraw items” or to “Change physical items” or other jobs.

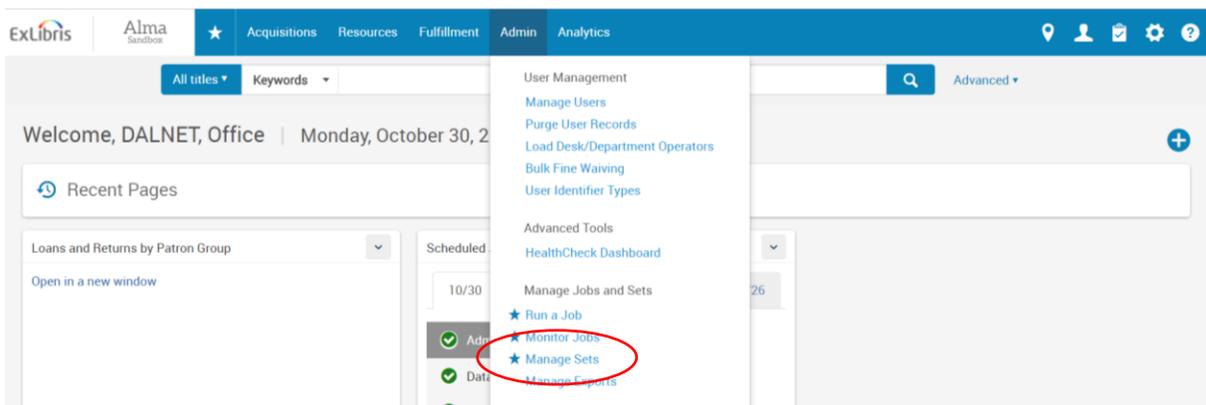
An Itemized set can be made in Alma by uploading a list of records (such as a **CSV** file with barcodes for items, **not xlsx**) or with the Add Members to Set feature which allows you to search for records and to add them to your set.

Creating an Itemized Set by Uploading a List

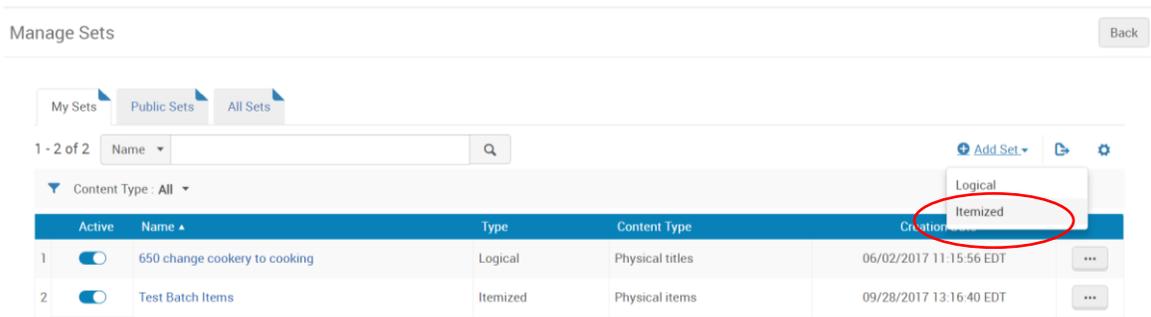
1. For this method you must first create a list numbers for the records you want on your list. If you are creating a list of records in order to make batch edits on them, then the barcode is likely the best number to use for each record on your list. Then you can easily scan each barcode into Excel and save the file in CSV format. Whatever type of number you use, the header of your column must be labeled with the data type so that when the file is loaded, Alma knows what data to match against to create your set, and **your file must have only one sheet/tab**, i.e. not a workbook. **Example CSV file list with barcode header:**

	A
1	BARCODE
2	30428125698745
3	30438984568723
4	30483845875692
5	30438000224741
6	
7	
8	
9	

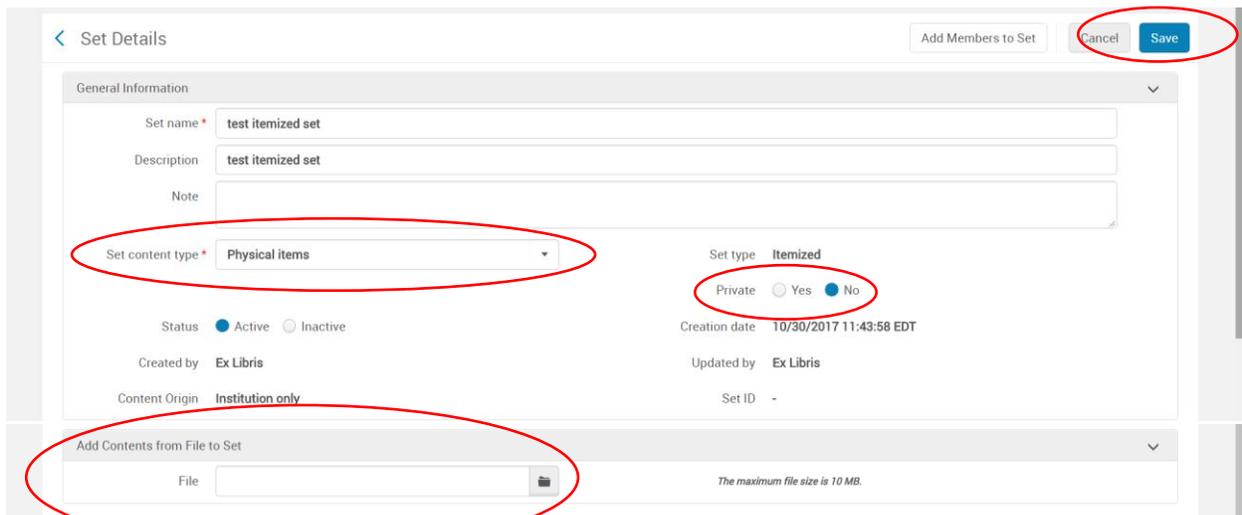
2. In Alma Admin, select Manage Sets:



3. Click on +Add Set and then select Itemized:



4. Fill in the relevant Set Details. A common useful Set Content Type is “Physical items” if you are wanting to create a set to make batch item changes. Select “Add Contents from File to Set” to upload your premade list CSV file. You can preview your file as shown below. Make sure to select No for your Private setting if you want others to be able to see your set. After filling in the details and loading your file you can click on Save.

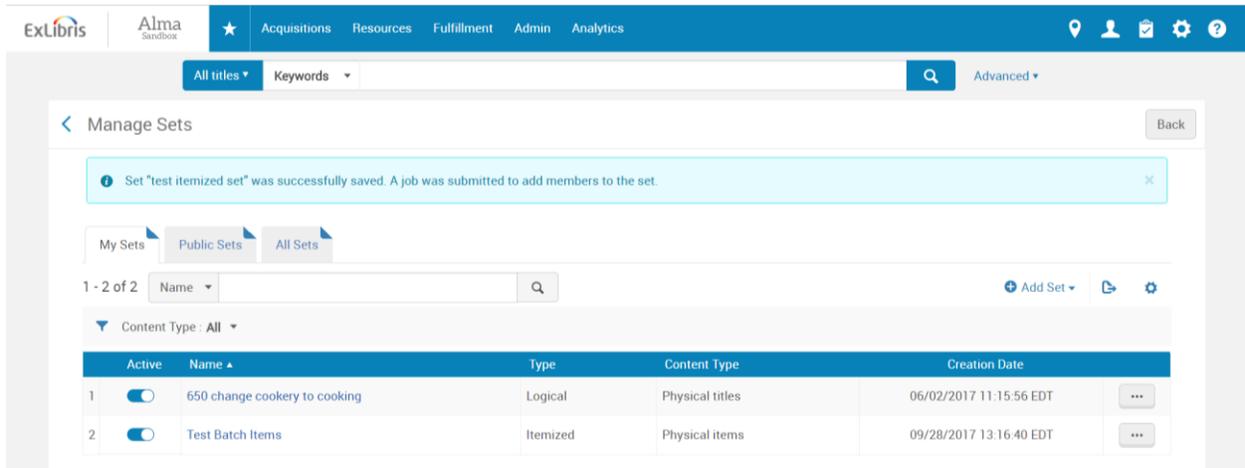


File Preview shown after uploading your selected file:



***Saving the set will run a job to add the items to the set. Depending on the size of your set this job may take a while to run.

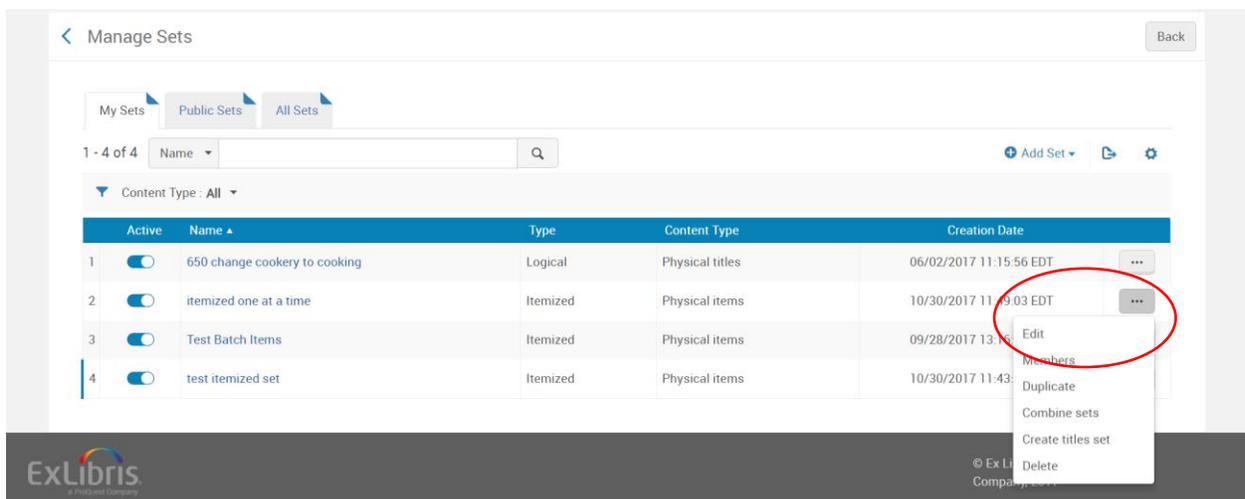
5. You now have an itemized set in Alma that you can Run a Job on in order to make batch item changes:



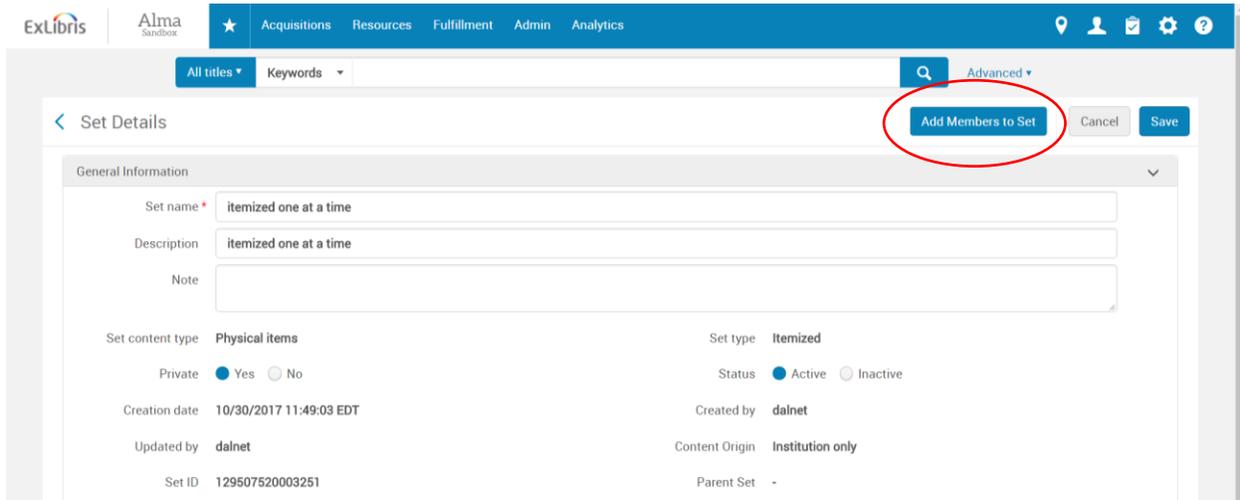
Creating an Itemized Set by Using Add Members to Set Feature

Another way to make an Itemized Set is to use the Add Members to Set feature and select records to add to your set from within Alma.

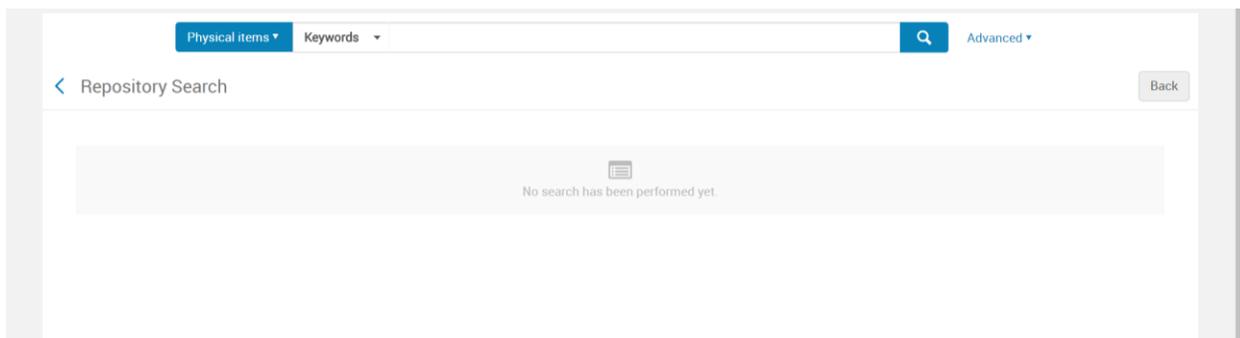
1. Create an Itemized Set in Alma, as noted above, but save the set without uploading a file to the system. This will create a new Itemized Set with nothing in it. Then click to Edit the set:



2. When the Itemized Set is opened for editing, click on the Add Members to Set button:



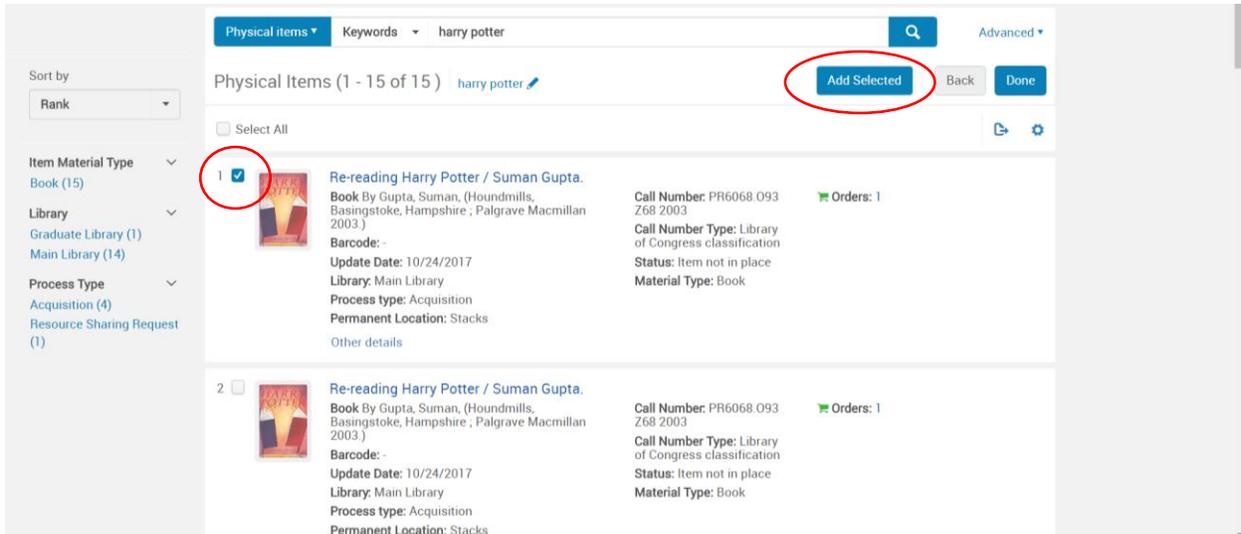
3. You will get a search screen to search for the records you want to add to the list:



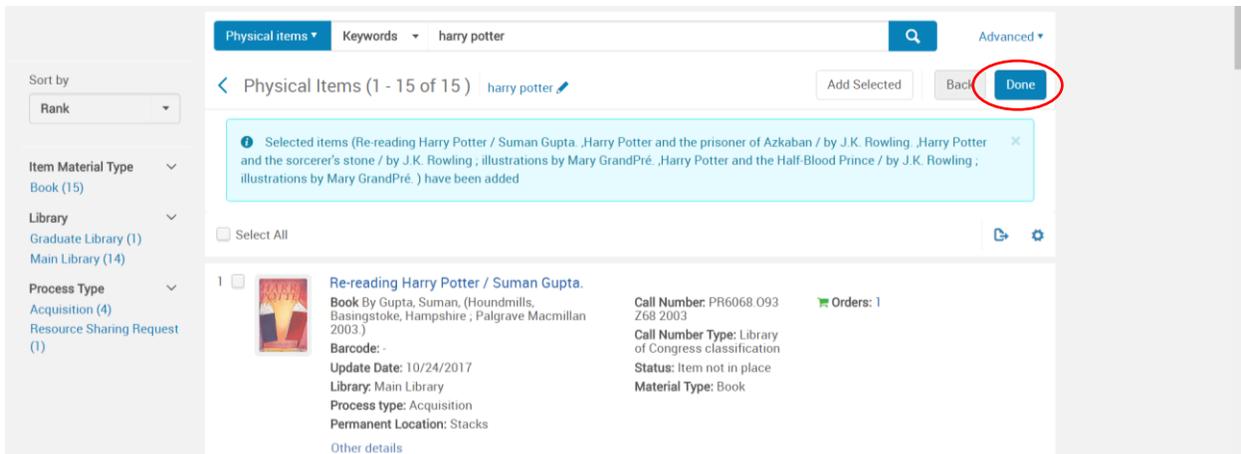
Note: You can perform any type of search but you should limit to “Physical items” so that your search results will show individual items that you can add to your list. For the search index you can use keyword, barcode, etc. as needed. Barcode searches can be exact and you can scan books if that is easier. But you can also perform a search for a keyword or on another index that would bring up multiple titles that you may be looking to add to your set.

4. Sample search results, from which you can add one or more records by checking the box next to the corresponding record and clicking on the Add Selected button.

You can continue adding records and doing more searches until your set is complete. When you are finished searching and adding records select Done:



Confirmation items have been added:



5. After clicking Done you will be returned to the Manage Sets screen. You now have an itemized set in Alma that you can Run a Job on in order to make batch item changes.

You can return at any time to add more items to the list, as long as the list is active. If you want to review the list in your itemized set you can select Members to view the set*:

The screenshot shows the Alma Manage Sets interface. At the top, there is a navigation bar with the ExLibris logo, Alma Sandbox, and menu items: Acquisitions, Resources, Fulfillment, Admin, and Analytics. Below the navigation bar, there is a 'Manage Sets' header with a 'Back' button. A notification bar indicates that a set named 'itemized one at a time' has been successfully saved. The interface includes tabs for 'My Sets', 'Public Sets', and 'All Sets'. A search bar and a 'Content Type' filter are present. The main content is a table with the following columns: Active, Name, Type, Content Type, and Creation Date. The table lists four sets, with the second set, 'itemized one at a time', highlighted. A context menu is open over the 'itemized one at a time' set, showing options: Edit, Members, Duplicate, Combine sets, Create titles set, and Delete. The 'Members' option is circled in red.

Active	Name	Type	Content Type	Creation Date
<input checked="" type="checkbox"/>	650 change cookery to cooking	Logical	Physical titles	06/02/2017 11:15:56 EDT
<input checked="" type="checkbox"/>	itemized one at a time	Itemized	Physical items	10/30/2017 11:09:03 EDT
<input checked="" type="checkbox"/>	Test Batch Items	Itemized	Physical items	09/28/2017 13:16:16 EDT
<input checked="" type="checkbox"/>	test itemized set	Itemized	Physical items	10/30/2017 11:43:16 EDT

*You must view **Members** of an *Itemized Set*, unlike a typical *Logical Set* for which you would view the **Results** for your logical search (as shown below). Both methods, for their respective Set types, will show you all records in your saved Sets.

Manage Sets Back

My Sets Public Sets All Sets

1 - 4 of 4 Name Add Set

Content Type: All

Active	Name	Type	Content Type	Creation Date	
<input checked="" type="checkbox"/>	650 change cookery to cooking	Logical	Physical titles	06/02/2017 11:15:56 EDT	<input type="button" value="..."/>
<input checked="" type="checkbox"/>	itemized one at a time	Itemized	Physical items	10/30/2017 11:49:13:16	
<input checked="" type="checkbox"/>	Test Batch Items	Itemized	Physical items	09/28/2017 13:16:13:16	
<input checked="" type="checkbox"/>	test itemized set	Itemized	Physical items	10/30/2017 11:43:13:16	

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

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See also: Running a Job on a Set (Batch Editing Sets / Item Group Editing) in Alma