An Introduction to Creating and Managing Sets

Mike Rogers University of Tennessee eBUG Conference, June 18, 2021

What are sets?

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_ (English)/050Administration/070Managing_Jobs/060Managing_Search_Queries_and_Sets_

Collections of records created from:

- Search criteria, both Basic and Advanced
- Files containing system/record identifiers
- Two types:
 - Logical dynamic; created on the fly based on current repository conditions
 - **Itemized** static; represents "snapshot" in time when the set was first created

Who can create sets?

New for June 2020!

"Any role that can perform a repository search can save a query in order to create a set and to manage sets ... However, users can do so only for content types with which a user is allowed to work according to user's role."

- from Managing Search Queries and Sets

Where are sets located?

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Creating a set

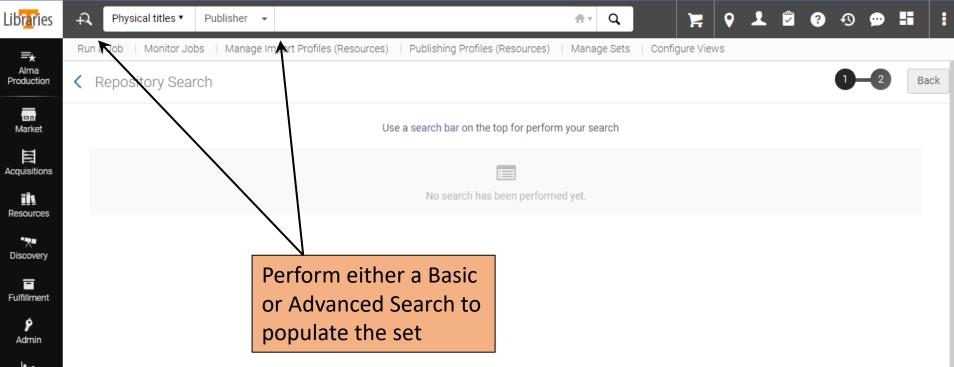
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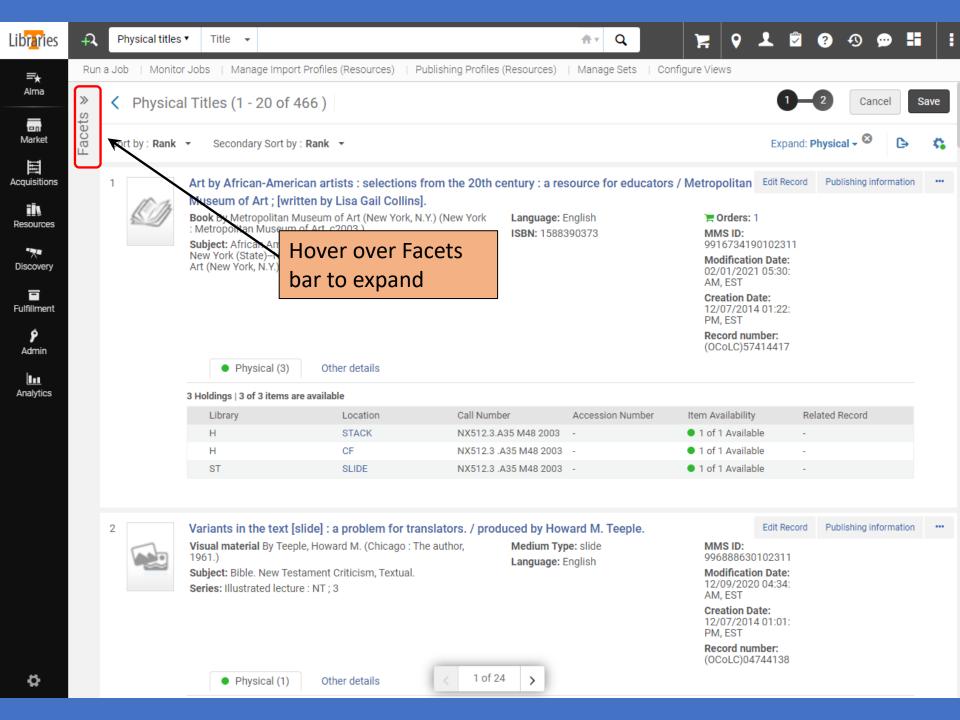
16 mm films, Slides, and Sound Recordings in Hoskins Storage *Note the format of such a search. Must use OR clauses in order to find these three Material Types in a single library

Find

(Library = Hoskins Storage AND Material Type = 16 mm Film) OR (Library = Hoskins Storage AND Material Type = Slide) OR (Library = Hoskins Storage AND Material Type = Sound Recording)

Analytics

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Set Actions

- Edit Edit the set characteristics
- Catalog set If less than 200 records, opens set in MDE (for Resource Management sets only)
- **Results** Display the records in the set
- Duplicate Make a copy of the set; can save time if creating a slightly different set than the original
- Itemize Transform a logical set into an itemized set
- Combine sets Create a new set from two sets of the same type. The new set is an Itemized Set.
- Filter Set Further refine an existing Logical or Itemized set, using Indication Rules. The new set is created as an Itemized Set
- Delete Deletes a set

Create an Itemized Set from a File of Identifiers

So, I've got this Excel file of MMS IDs (or Barcodes, OCLC#s, ISBNs, POL#s, etc.)

Is it possible to create a set a set from these?

Yes! This Ex Libris documentation has more details.



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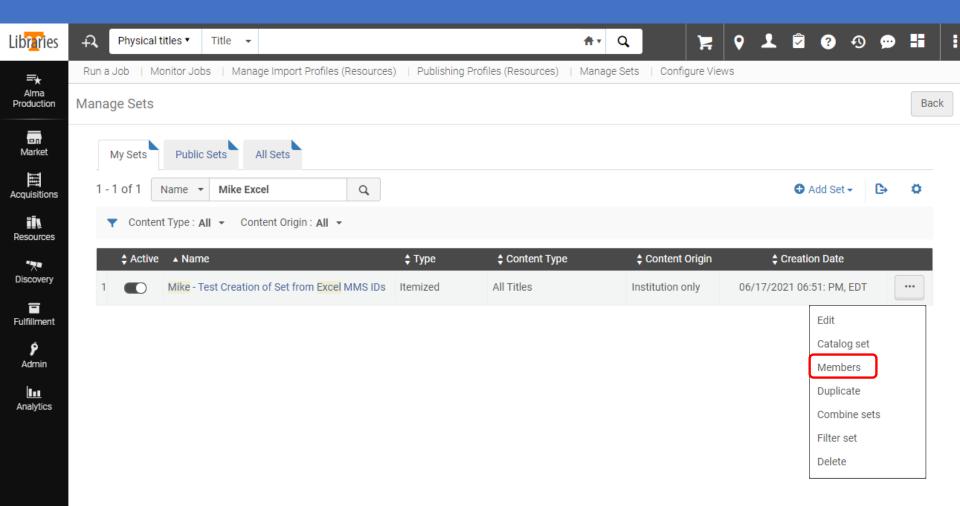
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