

Alma Course Reserves - Bulk Updates



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Alma can efficiently adjust large batches of Courses using Analytics, Sets, and Jobs. These tools can be used for tasks like adjusting the dates for your Courses, deleting Courses that you no longer need, and updating information like the Term for a batch of Courses. This part of the guide will cover a few ways that your unit can approach using this functionality to streamline your Course maintenance.

Roles Needed to Work in Alma Reserves – Course Bulk Update

Before you work with Bulk Course Updates for Reserves in Alma, your unit will need to request the following Roles in Alma:

- Course Reserves Viewer (scoped to your Library)
- Course Reserves Operator (scoped to your Library)
- Course Reserves Manager (scoped to your Library)
- Designs Analytics (scoped to the Institution)

Roles can be requested using the [Alma Permissions Request Form](#)

Creating Your Set

In this context, your Set in Alma will be the list of Courses that you wish to update. The kind of set that you'll use for this is called an Itemized Set. Itemized Sets are made from a list of Courses that you provide to Alma (as opposed to a Logical Set, which uses specific conditions to choose which records to update). There are two options for creating up your Itemized Set:

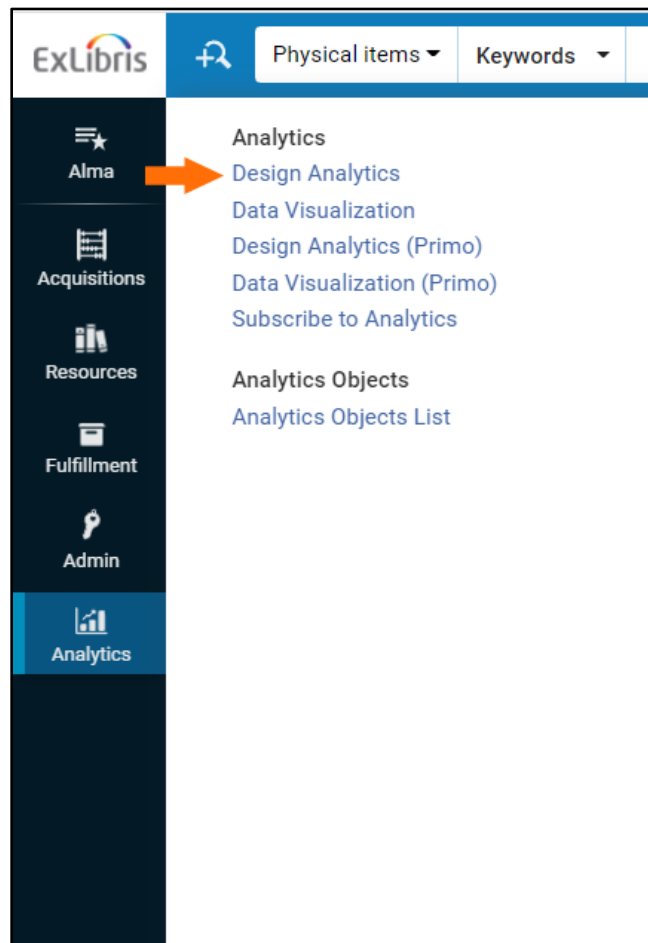
Creating Your Set Option 1: Using Alma Analytics

One way that we can approach making a Set is by generating a list of COURSE_IDs for courses that you'd like to update. The COURSE_ID is a 17-digit number assigned to each course (similar to an MMSID for a bibliographic record) that isn't easy to locate in Alma. We can locate these numbers using Alma Analytics*.

***Important note:** The data that Analytics pulls in reflects everything that happened before the previous evening at approximately 7pm, so any new courses that you added today into Alma would not be seen in the Analytics report data until tomorrow.

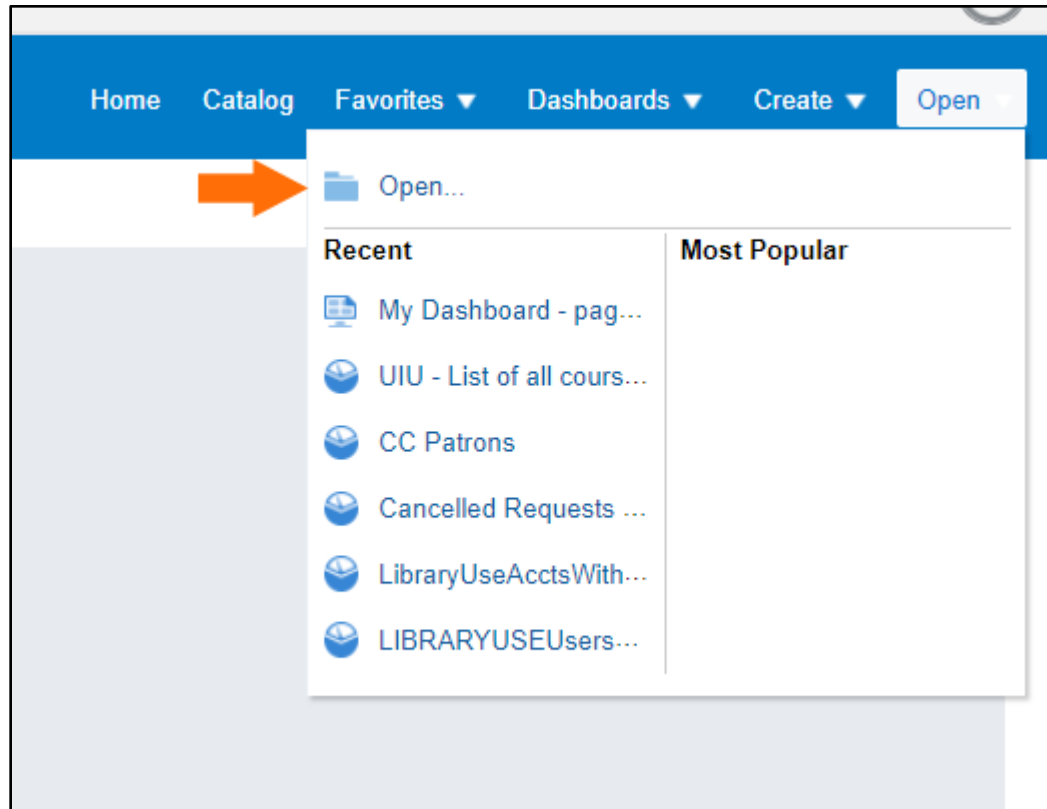
To create a set using Alma Analytics, follow these steps:


1. Using the Alma menu on the left side of your screen, navigate to **Analytics > Design Analytics**



- Analytics will open in another tab. After navigating to the new tab, you can use **Open** to use a pre-built report that's been created to generate a list of all Courses currently in Alma*.

***Note:** If you have experience using Analytics and would like to create your own report, that is also an option! It's recommended that any report used for this purpose include the following fields at minimum: Course ID, Course Code, Course Name, Processing Department. If you use your own report, skip step 3.

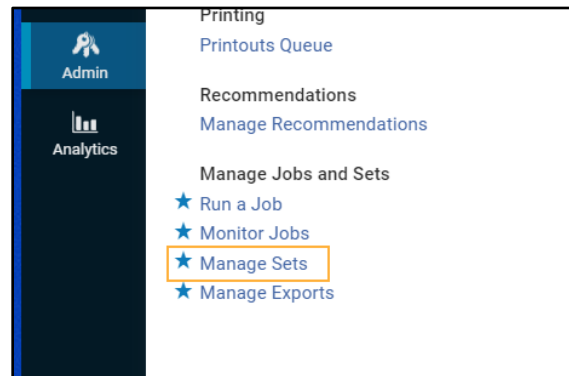


- The pre-built report can be found using this file path: **Shared Folders> University of Illinois at Urbana-Champaign (UIU) ---Champaign and Urbana, IL 01CARLI_UIU> Reports> "UIU-List of all courses (includes COURSE_ID)"**
- Once your report has run, Analytics will display a list of results that you can export to Excel.
- Click the  icon and select **Data > Excel**

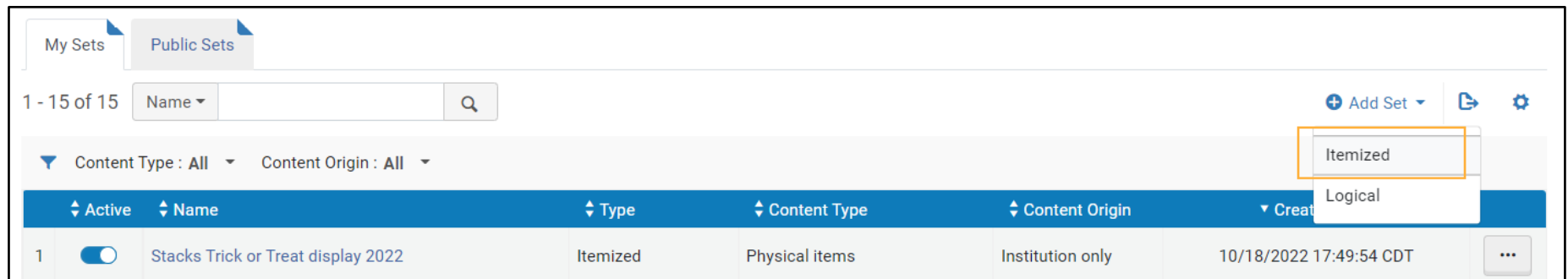
The screenshot shows a web interface for listing courses. The title bar reads "UIU - List of all courses (inclu...". Below the title bar are tabs for "Criteria", "Results", "Prompts", and "Advanced". On the left, there is a "Subject Areas" sidebar with a search icon and a list of folders including "Reading List Citations", "Reading List Citation Cre", "Leganto Reading List Se", "Reading Lists", "Courses", "Bibliographic Details", "Citation Metadata Details", "Citation Copyright", and "Librarian". The main content area has a toolbar with various icons. A context menu is open over the table, showing options: "Formatted", "Data", "Excel", "CSV", "Tab Delimited", and "XML". The table has a title "UIU - List of all co... (es COURSE_ID)" and a header row with columns "Course ID", "Course Code", and "Course Name".

Course ID	Course Code	Course Name
26339089430005899	ADV:281	Advertising Research Methods
26342462520005899	PSYC:332	Social Psych Methods Lab
26342953330005899	AFRO:383	History of Black Women's Activism
26342958480005899	GWS:383	History of Black Women's Activism

6. Find the exported file in your Downloads folder on your computer and open it.
7. Once the file is open, rename the Column A header "COURSE_ID". **Note: This header will already be labeled "Course ID" when you open the file. If you do not reformat it as "COURSE_ID", this process will not work.**
8. Review this list and choose the courses that you would like to update. Remove all courses that you do not want to update using this job from this spreadsheet. **Note: This Job should only be used to update Courses for your Processing Unit.**
9. Once you've edited the spreadsheet to only include courses that you would like to update, delete all columns from your spreadsheet except for the **COURSE_ID** column.
10. Save your spreadsheet.
11. Return to Alma.
12. From your Alma homepage, navigate to **Admin > Manage Sets**



13. In the **Manage Sets** screen, click **Add Set** and choose **Itemized**



14. Complete the details on the **Set Details** page.

Set Details Add Members to Set Cancel Save

General Information

Set name * **Fall 2022 Stacks Course Update**

Description **Updating the dates for course that are being taught again in Spring 2023**

Note

Set content type * **Courses**

Set type **Itemized**

Private No Yes

Status Active Inactive

Creation date **10/26/2022 17:16:55 CDT**

Created by **Ex Libris**


Updated by **Ex Libris**

Content Origin Institution only Discovery

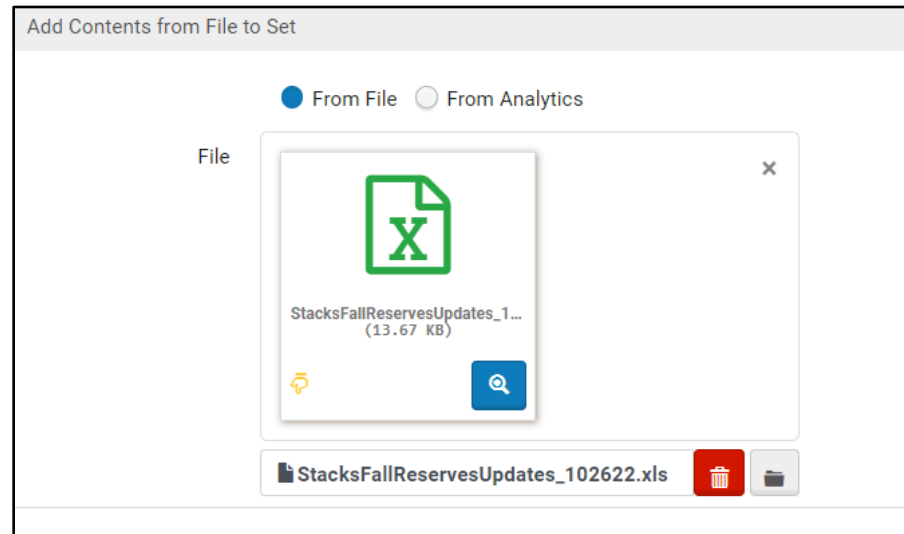
Set ID -

Add Contents from File to Set

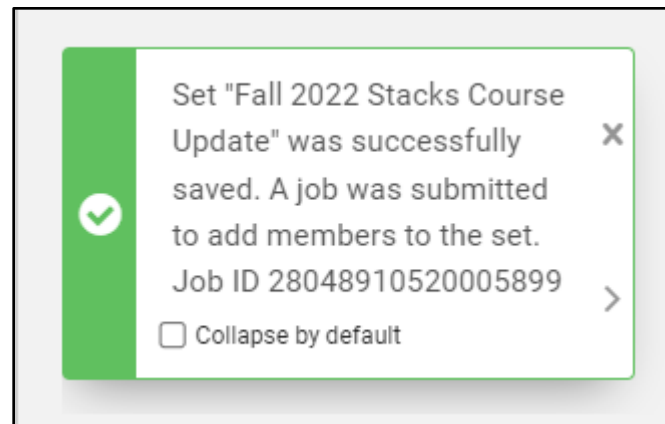
From File From Analytics

File  The maximum file size is 10 MB.

- Enter **Set Name**.
- Enter a **Description** and/or **Note** as desired.
- Use the **Set content type** dropdown menu to select **Courses**
- Use the **Private** radio button to select **Yes** or **No**. Private Sets can only be seen by you, whereas non-private Sets will be accessible to any Alma user that is able to create Sets in our environment.
- Leave other settings as they are.
- Under **Add Contents from File to Set**, you'll find a file icon that you can click to select the file you created for this purpose.



15. Click **Save**. Alma will give a message confirming that your Set is in the process of being created.



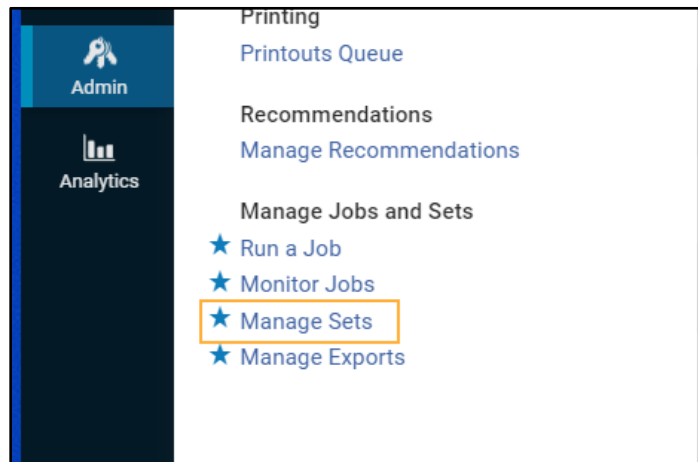
16. You'll receive an automated Alma notification email when your Set is ready.

17. Now your set is ready to be used in the Course Bulk Update Job!

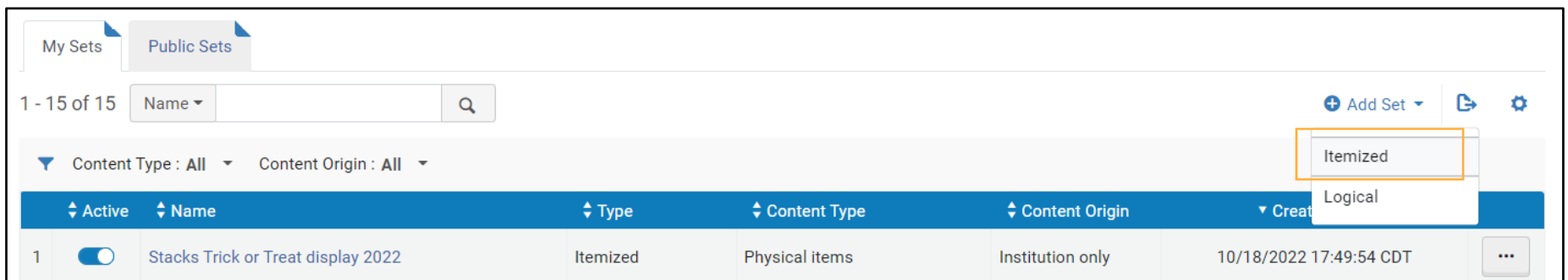
Creating Your Set Option 2: Manual List Creation

You can also create a set by manually selecting specific courses.

1. From your Alma homepage, navigate to **Admin > Manage Sets**



2. In the **Manage Sets** screen, click **Add Set** and choose **Itemized**



3. Complete the details on the **Set Details** page.

Set Details Add Members to Set Cancel Save

General Information

Set name * **Fall 2022 Stacks Course Update**

Description **Updating the dates for course that are being taught again in Spring 2023**

Note

Set content type * **Courses**

Set type **Itemized**

Private No Yes

Status Active Inactive

Creation date **10/26/2022 17:16:55 CDT**

Created by **Ex Libris**


Updated by **Ex Libris**

Content Origin Institution only Discovery

Set ID -

Add Contents from File to Set

From File From Analytics

File  The maximum file size is 10 MB.

- a. Enter **Set Name**.
 - b. Enter a **Description** and/or **Note** as desired.
 - c. Use the **Set content type** dropdown menu to select **Courses**
 - d. Use the **Private** radio button to select **Yes** or **No**. Private Sets can only be seen by you, whereas non-private Sets will be accessible to any Alma user that is able to create Sets in our environment.
 - e. Leave other settings as they are.
4. Then in the upper right of the window, click on the **Add Members to Set** button.

< Set Details Add Members to Set

General Information

Set name *

Description

Note

Set content type *

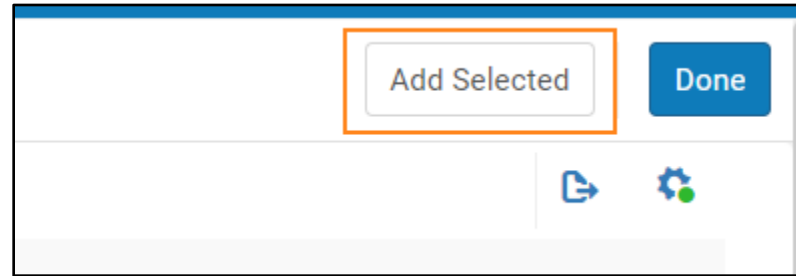
Set type

18. From there, you can use the checkboxes to select the courses that you want to add to the set. **Note: This Job should only be used to update Courses for your Processing Unit.**

Visibility: Unarchived

	Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Term	Start Date	End Date	<input type="checkbox"/>	<input type="button" value="..."/>
1	AAS:100	-	Intro Asian American Studies		Communica... Reserves	Multiple	Active	Fall	08/18/20...	12/24/2022	<input type="checkbox"/>	<input type="button" value="..."/>

- a. On each page of listed courses, when you have "checked" the ones that you want to add to the set, select the **Add Selected** button in the upper right.

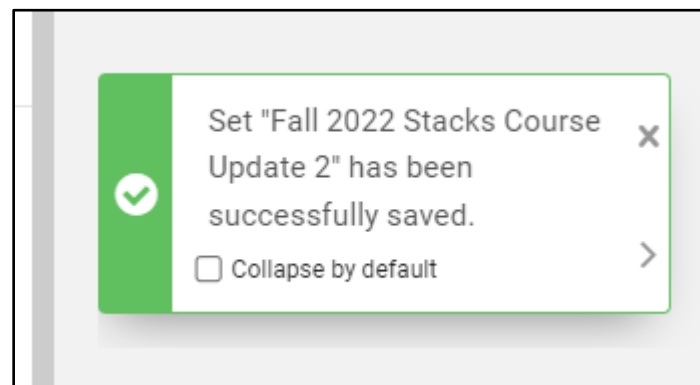


- b. If needed, proceed to the next page of results to continue adding courses to the set.
- c. When you have added all the courses that you want to the set, select on the **Done** button in the upper right.

 A screenshot of a web application interface for managing courses. At the top, there is a breadcrumb 'Courses (1 - 1 of 1) | stacks' and two buttons: 'Add Selected' and 'Done'. The 'Done' button is highlighted with an orange box. Below the buttons is a table with columns: Code, Section, Name, Academic Department, Processing Department, Instructor, Status, Term, Start Date, End Date, and a checkbox. The table contains one row for 'TEST:101' with a checked checkbox. To the right of the table, a blue information message box states: 'Selected item(s) (Intro to Alma Testing) have been added'.

Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Term	Start Date	End Date	
1 TEST:101	-	Intro to Alma Testing	Stacks Reserves	Fish, Stackles	Inactive	Permane...	04/30/20...	04/30/2070	<input checked="" type="checkbox"/>	...

5. You should receive a green checkbox message letting you know that your set has been added successfully.



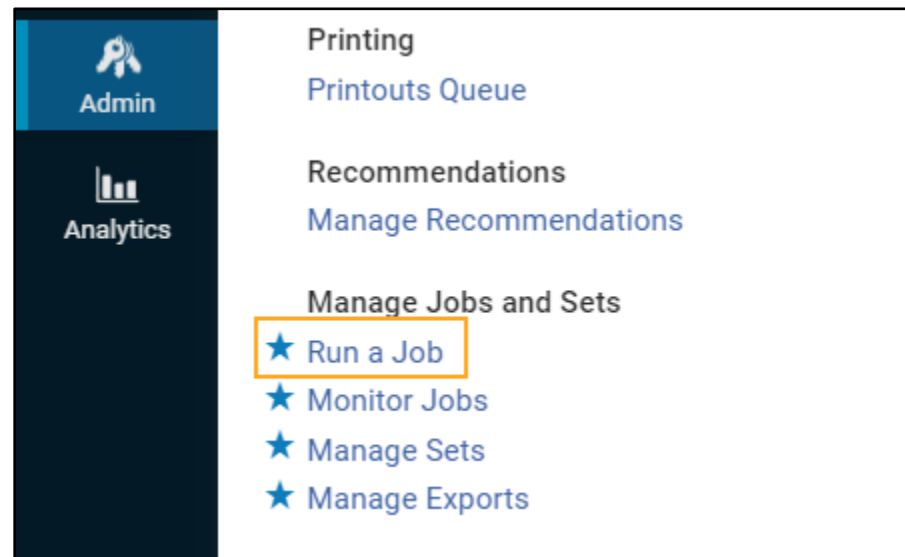
6. Now your set is ready to be used in the Course Bulk Update Job!

Adding the members to the set using this second method above may take more time as there may be multiple pages of courses to look through. If you find later that you need to add more courses to your set, can always go back to the set and select more courses later to add to the set before running the Course Bulk Update job.

Running the Course Bulk Update Job in Alma

Once you've created your Set of Courses using one of the above options, you'll be able to run a Job on your Set. Jobs can update groups of records in different ways.

1. Using the Alma menu on the left side of your screen, navigate to **Admin > Run a Job**



2. Locate the Course Bulk Update Job. You can do this either by finding this Job in your list of available Jobs, or by using the search bar on the Run a Job page.
3. Select the radio button next to the Course Bulk Update Job.
4. Click **Next**.

Run a Job - Select Job to Run GuideMe

1 - 1 of 1 Description **Course Bulk Update** Q

Type: All Source type: All Content type: All

	Name	Description	Content Type	Type
1	<input checked="" type="radio"/>	Course Bulk Update	Course Bulk Update	Course Courses

Cancel **Next**

5. Alma will navigate to a list of your Sets that are eligible to be handled by this type of Job. This Job can only be used to update lists of Courses.
6. Select the Set that you'd like to run the Course Bulk Update Job on.
7. Click **Next**.

Run a Job - Select Set

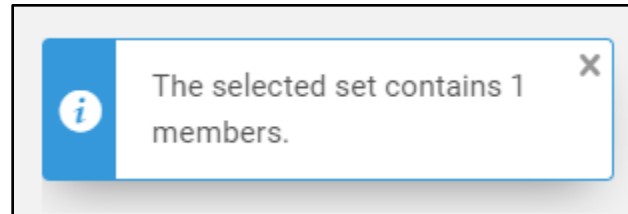
1 2 3 4 Cancel Back **Next**

1 - 2 of 2 Name Q

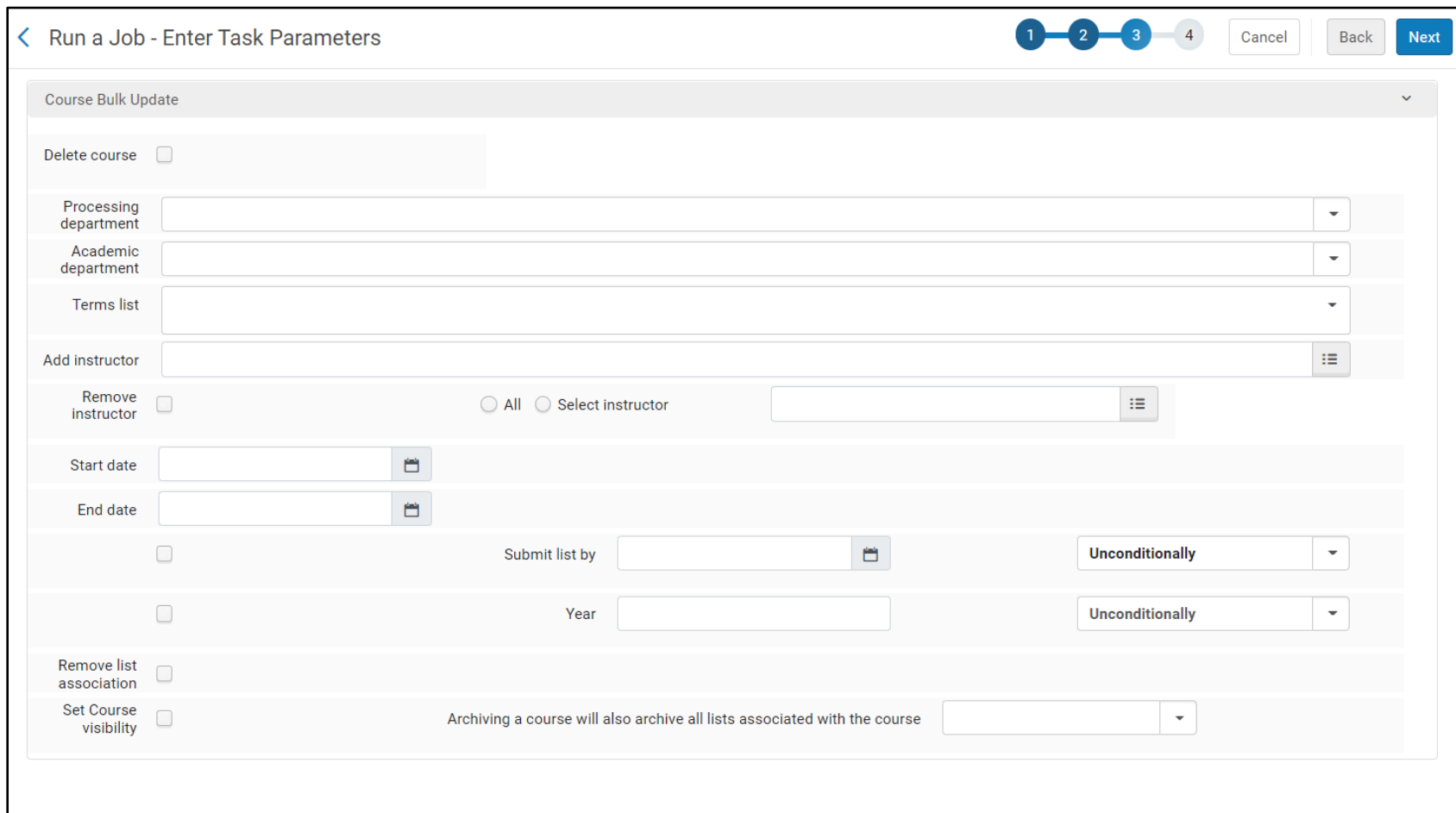
Content Type: All

	Name	Type	Content Type	Content Origin	Create Date	
1	<input type="radio"/>	Fall 2022 Stacks Course Update 2	Itemized	Courses	Institution only	12/05/2022 17:40:34 CST
2	<input checked="" type="radio"/>	Fall 2022 Stacks Course Update	Itemized	Courses	Institution only	10/26/2022 17:16:55 CDT

8. Alma will display an informational popup on the right side of the screen letting you know how many Courses are in the Set that you've selected.



9. Alma will also offer you many Task Parameters (or settings) that you can select to choose how this Job updates your Set of Courses.

A screenshot of the "Run a Job - Enter Task Parameters" form in Alma. The form is titled "Course Bulk Update" and is part of a multi-step process, with step 3 of 4 highlighted. The form contains several sections for configuring the job parameters. The "Delete course" section has a checkbox. The "Processing department", "Academic department", and "Terms list" sections are dropdown menus. The "Add instructor" section has a text input field and a menu icon. The "Remove instructor" section has a checkbox, radio buttons for "All" and "Select instructor", and a text input field with a menu icon. The "Start date" and "End date" sections have date pickers. The "Submit list by" section has a checkbox, a date picker, and a dropdown menu set to "Unconditionally". The "Year" section has a checkbox, a text input field, and a dropdown menu set to "Unconditionally". The "Remove list association" section has a checkbox. The "Set Course visibility" section has a checkbox and a text input field with a dropdown menu. The form is styled with a clean, modern design using light gray and white colors with blue accents for the step indicators and buttons.

10. Deciding how to use these functions may take further research; see [More Alma Reserves – Course Bulk Update Resources](#) for more information about how each of the Task Parameters impacts the Courses in your Set. A few tips about the Enter Task Parameters Screen:
- Fields that have a check box available next to them require that you check that box in order to successfully change that field in your courses. For example, if you fill in a new **Year** to update your Courses from 2022 to 2023 but do not check the box to the left of **Year**, the Year in your Courses will not update when you run your Job.
 - For some fields, you have the option of changing the data **Unconditionally, If field not empty**, or **If field empty**. If you choose **Unconditionally**, Alma will change this field no matter what existing data Alma has in that field for your Courses. It's important for these fields to choose the option that best suits the update that you're making.
11. Once you've added your parameters, click **Next** in the top right corner. In this example, we've input parameters to update the Start and End Dates for the Courses in our Set.

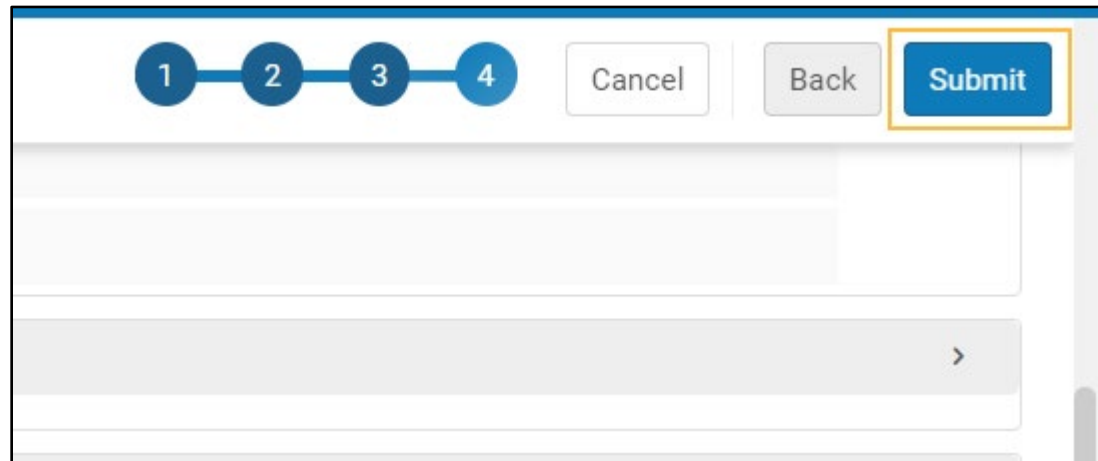
The screenshot displays the 'Run a Job - Enter Task Parameters' interface. At the top, there is a navigation bar with a back arrow, the title 'Run a Job - Enter Task Parameters', and a progress indicator with steps 1, 2, 3, and 4. Step 3 is currently active. To the right of the progress indicator are buttons for 'Cancel', 'Back', and 'Next'. The 'Next' button is highlighted with a blue border. Below the navigation bar is a dropdown menu labeled 'Course Bulk Update'. The main form area contains several sections:

- Delete course:** A checkbox that is currently unchecked.
- Processing department:** A text input field with a dropdown arrow.
- Academic department:** A text input field with a dropdown arrow.
- Terms list:** A text input field with a dropdown arrow.
- Add instructor:** A text input field with a menu icon.
- Remove instructor:** A checkbox that is unchecked, followed by radio buttons for 'All' and 'Select instructor', and a text input field with a menu icon.
- Start date:** A date input field containing '01/11/2023', with a clear 'X' button and a calendar icon.
- End date:** A date input field containing '05/22/2022', with a clear 'X' button and a calendar icon.
- Submit list by:** A checkbox that is unchecked, followed by a text input field with a calendar icon, and a dropdown menu set to 'Unconditionally'.
- Year:** A checkbox that is unchecked, followed by a text input field and a dropdown menu set to 'Unconditionally'.
- Remove list association:** A checkbox that is unchecked.
- Set Course visibility:** A checkbox that is unchecked, followed by the text 'Archiving a course will also archive all lists associated with the course' and a dropdown menu.

12. The next screen will confirm what will and won't be changed in your Set by this Job. In this example, only the Start date and End date will be updated.

Course Bulk Update			
Delete course	No		
Processing department			
Academic department			
Terms list	-		
Add instructor			
Remove instructor	No	-	
Start date	01/11/2023		
End date	05/22/2023		
No		Submit list by	- Unconditionally
No		Year	- Unconditionally
Remove list association	No		
Set Course visibility	No	Archiving a course will also archive all lists associated with the course	

13. Once you've reviewed the summary, click **Submit**.



14. At this point, your Job will be submitted, and Alma will navigate you to a list of Jobs that are currently running in our Alma environment. This will include your Job, as well as Jobs that are being run by automated Alma processes or other Alma Operators.

Job Category : All									
Name	Job Category	Creator	Submit Date	Start Date	Progress	Status	Records processed	Records with exceptions	
1. Course Bulk Update - Fall 2022 Stacks Course Update - 12/12/2022 18:18:30 CST	Repository	blanken4@illinois... 	12/12/2022 18:21:02 CST	12/12/2022 18:21:02 CST	N/A	Initializing	-	-	

15. When your Job has finished running, you will receive an automated email from Alma giving you a summary of the changes made to your Set. Jobs typically only take a few minutes, but this can depend upon several factors in Alma (e.g., how many other reports are running, how large your Set is).

System Job Notification

12/12/2022

KRISTEN BLANKENSHIP

1408 W. GREGORY

M/C 522

UIUC CAMPUS MAIL, IL 00001

University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL

Hello KRISTEN BLANKENSHIP,

The job that you recently initiated in Alma is now complete:

Job Report

Name	Course Bulk Update - Fall 2022 Stacks Course Update - 12/12/2022 18:18:30 CST	Created by	blanken4@illinois.edu
Process ID	29921547160005899	Total run time	0.86 Seconds
Started on	12/12/2022 18:21:02 CST	Finished on	12/12/2022 18:21:03 CST

More Alma Reserves – Course Bulk Update Resources

Ex Libris – Manual Jobs (Course Bulk Update)

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/070Managing_Jobs/020Manual_Jobs_on_Defined_Sets#Course_Bulk_Update](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Manual_Jobs_on_Defined_Sets#Course_Bulk_Update)

Questions? Troubles? Feedback for this guide? Contact [Central Access Services!](#)

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