**Withdrawals (Operational Policy)**

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| **Area covered** | cataloging |
| **Prepared by** | Cataloging Task Force |
| **Revised by** | Resource Management Functional Committee |

**Background**

The following document serves as the operational policy governing the withdrawal of items and titles in Alma. CSU Libraries are required to follow the procedures as outlined for withdrawals.

These procedures include instructions, based on input from the Analytics & Reporting Working Group, for distinguishing between withdrawals and deletions by coding withdrawals at the item level. If libraries need to make the distinction at the bibliographic/title level, consider recording a code in a bibliographic 9XX local field. The bibliographic record would need to be saved before deleting.

Libraries should ensure to (1) delete withdrawn items fully and (2) embed some kind of code that is reportable in Analytics, as suggested in this policy.

**Scope**

Policy outlines procedures CSU libraries are required to follow for withdrawal of physical items.

**Procedures**

**WITHDRAWALS - INDIVIDUAL ITEM**

1. Scan barcode into the **All titles** search box.
2. Verify that the result matches the item in hand.
3. Click on the **Items** link under your result.
4. If multiple items appear on the next screen, find the row with your barcode.
5. If your campus needs to make a distinction between deletions and withdrawals, and you need to record withdrawals at the item level:
	1. Click on the **Actions** button for your item and select Edit.
	2. Click on the **Notes** tab.
	3. In one of the **Statistics Notes** fields (selected by your institution), record **wdn** and the fiscal year. Example: **wdn 17/18**
	4. Click on **Save**.

 *Alternative*:

Use Item Inventory Method: Inventory number and date can be used as an alternative to Statistical Notes method above to record wdn and date.

1. Click on the **Actions** button for your item again and select **Withdraw**.
2. In the confirmation box, click **Confirm**. If you’re *not* deleting the last item for the holdings record (e.g. selector only wants to withdraw one copy), you’re done. Otherwise, continue with steps 8-13. For serials: If not withdrawing all volumes in a serial title, the holdings record will need to be updated.
3. If you *are* deleting the last item for the holdings record, select the **Delete the holdings record** and click **Go**.
4. If there are other holdings records with inventory associated with the bibliographic record, you’re done. Otherwise, continue with steps 10-15.
5. Click on the title next to **Resource description.**
6. Click on the **Edit** button.
7. Click on **File** and select **Copy to catalog**.
8. Copy the OCLC number and remove the holdings from WorldCat. (Note: Step to be revised, pending implementation of Publishing to OCLC functionality.)
9. Go to **File** and select **Delete Record** *or* type **CTRL+D**.
10. Click on the **Yes** button.

**WITHDRAWALS - SETS OF ITEMS (BATCH)**

**Create an itemized set of physical items**

1. Open an Excel spreadsheet, type **Barcode** in the first row of the first column. Alternatively, use a basic text editor and type **Barcode** on the first line.
2. Scan in barcodes, ensuring each barcode is populated in a separate row, or line.
3. Go to **Alma-> Administration-> Manage Jobs and Sets**->**Manage Sets**.
4. Click on the **Add Sets** button, choose **Itemized** as the set type.
5. Name the set, set content type as **Physical items**.
6. Use **Add Contents from File to Set** to upload the saved file of barcodes, then click **Save.**

Alma will run the job to create the set. **BEFORE** WITHDRAWING THE ITEMS: In **My Sets**, locate the itemized set you created in the steps above, and from the Actions dropdown, choose **Create titles set**, rename the set and click on **Submit**. Click on **Confirm**.

**Run a job to record statistics note** *(if applicable)*

If your campus needs to make a distinction between deletions and withdrawals, and you need to record withdrawals at the item level:

1. Go to **Alma -> Manage Jobs and Sets ->Run a Job.**
2. In the Type box, select Information Update.
3. Select Change physical items.
4. Find and select your itemized physical items set, and click on **Next**.
5. In the Change other fields section, scroll down to near the bottom and find the statistics note your institution is using to record withdrawals.
6. Check the box to the left of the statistics note field.
7. In the box type **wdn** and the fiscal year. Example: **wdn 17.18**
8. Click on **Next.**
9. Review the job settings and click on **Submit.**

**Withdraw the items.**

1. Go to **Alma-> Administration-> Manage Jobs and Sets**-> **Run a Job.**
2. Select **Withdraw items** and click on **Next.**
3. Find and select your itemized physical items set, and click on **Next.**
4. Select the option to **Delete holdings; suppress bibliographic records that have no other holdings from publishing** and click on **Next**.
5. Review and confirm the job details. Click on **Submit**

Alma will withdraw the items, delete holdings without items, and suppress bibliographic records that have no other holdings for your institution.

**Delete holdings in OCLC**

**Note: Step to be revised, pending implementation of Publishing to OCLC functionality.**

1. In Alma, return to the **All titles** set created from your physical items set.
2. On the row for your **All titles** set, click on the Actions button, then select **Members**.
3. Click on **Tools**, then select **Excel** to create a spreadsheet.
4. Sort the **Availability** column to gather the rows that have no value for that column.
5. For the rows that have no value in the **Availability** column, copy the values of the **Record Number column** into a text editor.
6. Use a **Find and Replace** tool to strip out extraneous data, e.g. **ocm**, **ocn, -01cals\_network,** so that you’re left with only the OCLC number value.
7. Copy the OCLC numbers or simply save your text file.
8. In Connexion Client, go to **Batch> Holdings by OCLC Number**.
9. Paste the column of OCLC numbers into the window. (Or, import the text file of OCLC record numbers.)
10. Select Delete Holdings, and click **OK**.

**Delete bibliographic records in Alma**

1. Go to **Alma -> Administration -> Manage Jobs and Sets -> Run a Job.**
2. Select the **Delete Bibliographic records** job and click **Next.**
3. Find your all titles set, select it, and click **Next.**
4. To protect bibliographic records with inventory, **DO NOT** select the task parameter **Delete all associated inventory resources.** Click on **Next.**
5. Review and confirm the job details. Click on **Submit**

Delete the physical Items set and the all titles set you created.

**Documentation (Ex Libris)**

[**Deleting Physical Items (Withdrawals)**](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Resource_Management/050Inventory/040Managing_Physical_Resources#Deleting_Physical_Items_(Withdrawals))