**Procedure: Withdrawals**

|  |  |
| --- | --- |
| **Document status** | March 21, 2017. Revised June 29, 2017 |
| **Area covered** | Cataloging |
| **Prepared by** | Cataloging Task Force |

**Background**

The following steps cover the procedure for withdrawing items and titles in Alma. These are the recommended steps pending evidentiary confirmation that the Publishing to OCLC functionality will delete holdings in OCLC for withdrawn bibliographic records. Once that is confirmed, this procedure will be revised.

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 your institution needs to make that 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.

**Scope**

Procedures apply to deletion of items for print monographs and serials.

**Procedures/Recommendations**

**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**.
6. Click on the **Actions** button for your item again and select **Withdraw**.
7. 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 7-13.
8. If you *are* deleting the last item for the holdings record, select the **Delete the holdings record** and click **Go**. For serials: If not withdrawing all volumes in a serial title, the holdings record will need to be updated.
9. Click on the title next to **Resource description.**
10. Click on the **Edit** button.
11. Click on **File** and select **Copy to catalog**.
12. Copy the OCLC number and remove the holdings from WorldCat. (Note: Step to be revised, pending implementation of Publishing to OCLC functionality.)
13. Go to **File** and select **Delete Record** *or* type **CTRL+D** .
14. 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. In the **Schedule Job** section of the next screen, the default option **As soon as possible** should already be selected. Click on **Next**.
6. 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.

**Remove unsuppressed titles**

1. Go to the itemized all titles set you created earlier.
2. Select and remove all titles that are unsuppressed. These titles represent bibliographic records with inventory for your institution.
3. The set should now contain only suppressed titles.
4. Click on **Done**.

**Run an unlinking job**

1. Go to **Alma -> Manage Jobs and Sets ->Run a Job.**
2. In the **Type** box, select **Metadata Management**.
3. Select **Unlink a set of records from the Network** and click on **Next**.
4. Find and select the itemized all titles from above, and click on **Next**.
5. No further configuration of parameters is required, so click on **Next**.
6. In the **Schedule Job** section of the next screen, the default option **As soon as possible** should already be selected. Click on **Next**.
7. Review and confirm the job details. Click on **Submit**.
8. Click on **Confirm**.

**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 ensure none of the rows in that column have any value.
5. In the **Record Number** column, use the **Find and Replace** feature to strip out extraneous data, e.g. **ocm**, **ocn, -01cals\_network,** so that you’re left with only the OCLC number value.
6. Copy the OCLC numbers from the **Record number** column.
7. In Connexion Client, go to **Batch> Holdings by OCLC Number**.
8. Paste the column of OCLC numbers into the window. (Or, import OCLC record numbers.)
9. 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 of remaining suppressed titles, 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. In the **Schedule Job** section of the next screen, the default option **As soon as possible** should already be selected. Click on **Next**.
6. Review and confirm the job details. Click on **Submit**

From your list of sets, delete your empty itemized Physical Items set. Check the associated titles set to make sure it’s empty. If it’s not empty, there was most likely a title with inventory you may have missed. If the inventory is to remain, relink that bibliographic record back to the NZ. Once your titles set is empty, delete the set.

**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))