**12/01/16: General Network Zone Workflow Questions**

**Migration Cleanup**

**SAN DIEGO -** We have migrated (via P2E) our order records for electronic resources attached to SerialsSolutions' MARC journal records.  Those records do not have OCLC#s, but carry SerialsSolutions' unique record identifiers.  How are we replace the bib records with either an existing OCLC bib records in NZ or download from OCLC Connexion.  We have about 500 such bib records in IZ.

* Repository search for “other system number” contains ssj and Is Linked = No to pull the records.
* No linking point in the bib so there is no way to automate this
* Use one bib in the repository search to demo the relinking process
  + Click on the Availability link to get to the portfolio editor
  + Click on the “relink to another bibliographic record” button
  + Search for title in NZ, Select
  + Choose option to “delete bibliographic records” for orphan bibs with no inventory
    - Note that this is in the IZ, so the record is deleted. More info below on how this specific option works for NZ bibs
  + Search for title in IZ again – note that there are now two portfolios with available links in Alma attached to the same bib.
* If not in NZ, follow standard cataloging protocols to add holdings in OCLC and export from Connexion into the NZ. Then, follow the above process to relink record.
* You can also use relinking to move physical holdings to another bib record. We will talk about this in more detail at the workshop.

**Withdrawal Functionality**

Withdrawing by sets as well as one by one, since we anticipate having to withdraw in bulk.

Related - What happens if another campus deletes a bib record from the NZ and we have local fields and inventory associated with that record? (I hope that our local fields and inventory will not also disappear.) After deletion from the NZ will our “instance” of the bib record move to our IZ? Are there ways to prevent or limit the ability to delete bib records from the NZ?

**To withdraw individual items:**

* List of items screen, check on the specific items to be withdrawn, click “withdraw”
  + Pop up message asks if you want to withdraw. Click yes. Item is withdrawn.
  + If the item was the last one on the holding, the following message is displayed: “The last item of this holdings record was deleted or moved. What do you want to do with the holdings record?”
    - Choose “delete bib record with no other holdings” to show the impact
* The bib is removed from the IZ. It is retained in the NZ but institutional holdings are removed.

**To withdraw in bullk:**

* Run Withdraw Items job on the set.
  + Note that you can instruct Alma to not withdraw items with active requests or work orders
  + When done, click on Actions → Reportto view the Items that were not deleted that are on loan, on request or have associated PO Lines.
  + The same functionality applies here with the deletion of the bib record. It only removes the bib from the IZ. NZ record stays put, even it was the only institution holding the item.
    - CSU policy is to not delete these stub records. https://calstate.atlassian.net/wiki/display/ULMST/Deleting+Network+Zone+Records+Without+Inventory+from+an+IZ
* When running the Withdraw items job, Alma checks to determine whether an item has an open order. Items with open orders are not withdrawn by the Withdraw items job. On the Job Report page, items with open orders are identified in the Number of unmanaged items count and an error message appears in the Report Table section of the Job Report page identifying the specific type of error.

**To track deleted / withdrawn titles:**

* Withdrawn items do not appear in Alma and are not published to Primo. You can view a historical record of these items in Analytics reports. Withdrawn items appear as Lifecycle = Deleted in Analytics.
  + There is an out-of-the-box report in Analytics for Item Withdrawals: /shared/Alma/Inventory/Reports/Item Withdrawals
  + If you want to run the report yourself, the Lifecycle parameter is available for both physical and electronic records:
    - Physical: Item-level in Physical Item Details, Bib-level in Bibliographic Details as Bibliographic Lifecycle
    - Electronic: Portfolio-level in Portfolio, Bib-level in Bibliographic Details as Bibliographic Lifecycle

**Helpful links:**

<http://knowledge.exlibrisgroup.com/Alma/Training/02_What's_New_Videos_2015/12_January_2015_Release/Relink_Electronic_Portfolio_to_a_Different_Bibliographic_Record>

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/040Managing_Physical_Resources#Deleting_Physical_Items_(Withdrawals)>

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets> - scroll or search for “Withdraw Items” job

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/020Using_the_Repository_Search/050Search_Indexes>

**Chat transcript**

from North American Professional Services to Everyone:

Hi all - we'll start shortly. Please mute your line when you enter the call. Thank you!

from Cal Poly SLO to Everyone:

sounds fine :-)

from Thoreau (SF) (privately):

How do I mute again?

to Thoreau (SF) (privately):

I did it for you; In the participants list, look for your handle, then click the microphone button on the right.

from Thoreau (SF) (privately):

Thanks!

from Fresno to Everyone:

Will this screen appear if there is an order attached?

from John Larson (privately):

Also note that most orders are attached to the inventory, so such a relinking would take the order with it attached to the portfolio.

from Holly Yu (privately):

Megan, in your opinion, would relinking be easier than creating a new record?

from John Larson to Everyone:

Also note that most orders are attached to the inventory, so such a relinking would take the order with it attached to the portfolio.

to John Larson (privately):

Thanks - was just writing you. :)

from TeamSDSU to Everyone:

why the bib says physical? we ere using e-rbib

from TeamSDSU to Everyone:

we need to submit a enhancement

from John Larson to Everyone:

Additional clarification: Primo will detect format based on attached inventory, so in Primo it should appear as electronic and "available online" to end users.

from Thoreau (SF) to Everyone:

Based on John's clarification, is it fair to think that we shouldn't bother correcting these material type issues in Alma?

from John Larson to Everyone:

If you see incorrect data in our NZ, reporting it to data services is always valid. But as Megan says, it's pretty low priority.

from Thoreau (SF) to Everyone:

Thanks.

from CSU San Marcos (privately):

What about inventory that is on a host bib in IZ - can someone delete the full bib in NZ that the host bib points to?

from North American Professional Services to Everyone:

from CSU San Marcos:

What about inventory that is on a host bib in IZ - can someone delete the full bib in NZ that the host bib points to?

from Northridge to Everyone:

what happens if there is an order attached?

from Northridge to Everyone:

thank you

from Stacy Magedanz (privately):

if you were the last holder of that item and you withdrew it, would it withdraw the NZ recor?

from North American Professional Services to Everyone:

if you were the last holder of that item and you withdrew it, would it withdraw the NZ recor?

from North American Professional Services to Everyone:

from Stacy Magedanz

from Thoreau (SF) to Everyone:

What would happen if San Jose State also withdrew the record. Would the bib still be in the NZ?

from Cal Poly SLO to Everyone:

If you had selected to supress the holdings, would the bib record also be suppressed?

from Fresno to Everyone:

So withdraw is delete?

from Cal Poly SLO to Everyone:

thanks

from SFSU (privately):

We have to report all titles that we delete for a fiscal year report. How can we track all the deleted titles?

from Northridge 2 to Everyone:

re: host bib records in bound width relationships link: https://calstate.atlassian.net/wiki/display/ULMST/Deleting+Network+Zone+Records+Without+Inventory+from+an+IZ

from North American Professional Services to Everyone:

from SFSU (privately):

We have to report all titles that we delete for a fiscal year report. How can we track all the deleted titles?

from John Larson to Everyone:

Regarding deleted records: Analytics tracks deleted records, so she'll be showing you This One Weird Trick to get data about withdrawn records.

from Cal Poly SLO to Everyone:

and items, too.

from John Larson to Everyone:

The point being that deleted items aren't lost--they'll just be essentially invisible in Alma.

from Sacramento State to Everyone:

"have no other holdings" refers to only the institution, or does that include other campuses?

from CSU San Marcos (privately):

what if bib has order record - will order be protected?

from North American Professional Services to Everyone:

from CSU San Marcos (privately):

what if bib has order record - will order be protected?

from CSU San Marcos to Everyone:

what if bib has order record - will order be protected?

from Northridge to Everyone:

If we want to withdraw an item that has a PO line attached, must we manually delete (or close?) the PO line first?

from Sacramento State to Everyone:

yes

from John Larson to Everyone:

And again--remember that most orders are attached at the inventory level, not the bibliographic level. The answer still stands, but the fact that Alma links orders to inventory whenever possible is enough of a shift that I want to highlight it.

from Sacramento State to Everyone:

clarification-- our question had to do with does Alma consider other institutions' holdings when determining whether to suppress, delete, holdings/bibs when no other holdings exist.

from Sherry Daniel@ - CPP (privately):

Will all these webinars be available in perpetuity?

from Northridge to Everyone:

Thank you!

from Cal Poly SLO to Everyone:

thank you.

from Thoreau (SF) to Everyone:

Thanks, Megan. Very helpful!

from Mark B. (Los Angeles) to Everyone:

Many thanks Megan, Dolph and John.

from Samuel (privately):

Thank you :)