Deleting an NZ record that is not being used

Scenario:

There exists an NZ record that is not held by any campus and doesn't have any inventory in the NZ either. It is essentially not being used and is extraneous and unnecessary. Sometimes these extraneous NZ records can cause issues in Primo when multiple records are deduped/merged or the extraneous problems cause problems for the Alma link resolver.

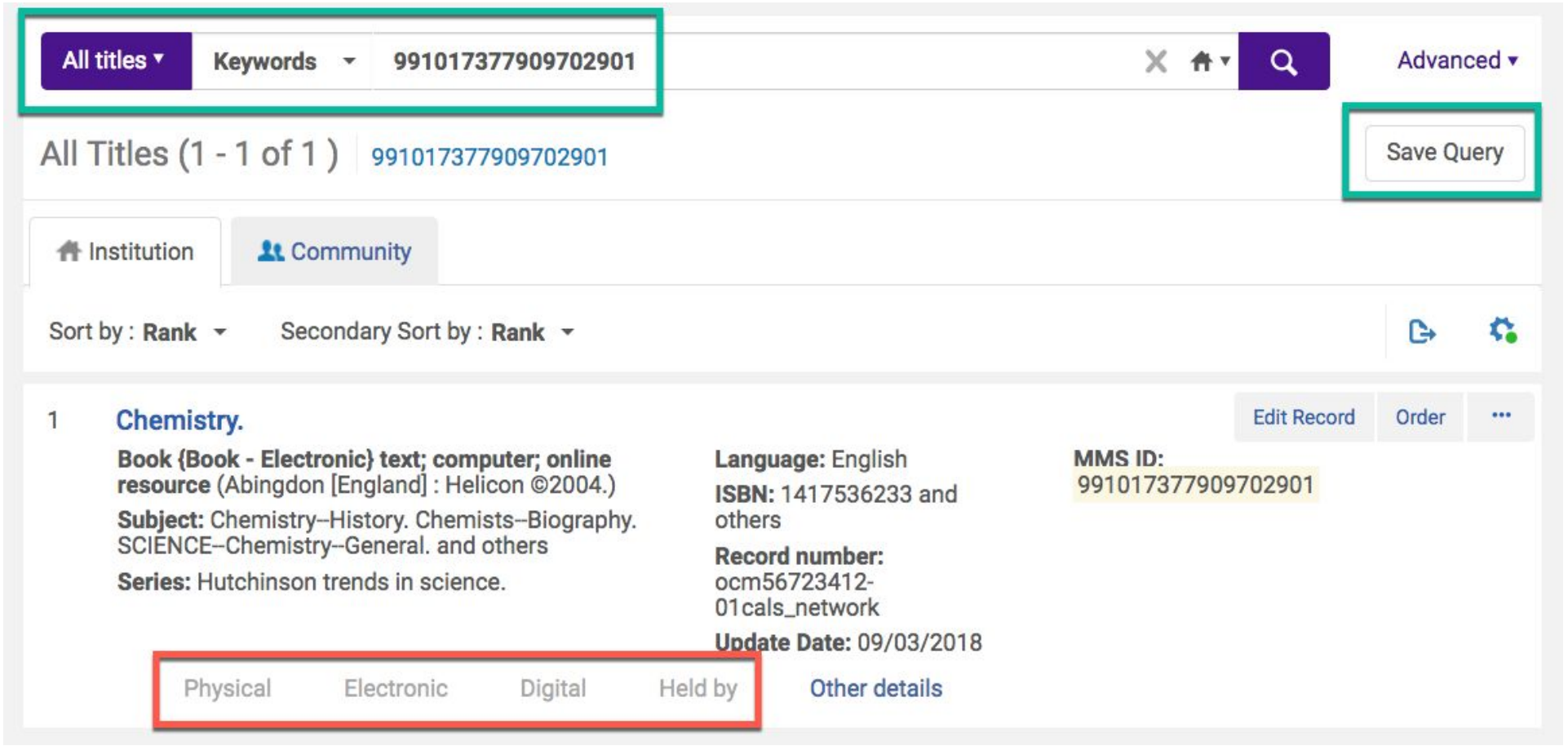
Usually what happens is a CSU person opens a Salesforce case with Exlibris support and they tell us to delete the NZ record because it is the cause of the problem.

The procedures below describe how to safely delete unused, NZ records.

You must have a user account for the NZ instance of Alma and you must have the role: Catalog Manager or Catalog Administrator.

Log in to the Network Zone instance of Alma.
(You can delete NZ records from a campus's instance of Alma but the NZ has a specific job to confirm that a NZ record is not in use.)

Locate the NZ record by MMS ID by doing an All titles search by MMS ID.
(Usually the MMS ID will be provided by Exlibris support.)

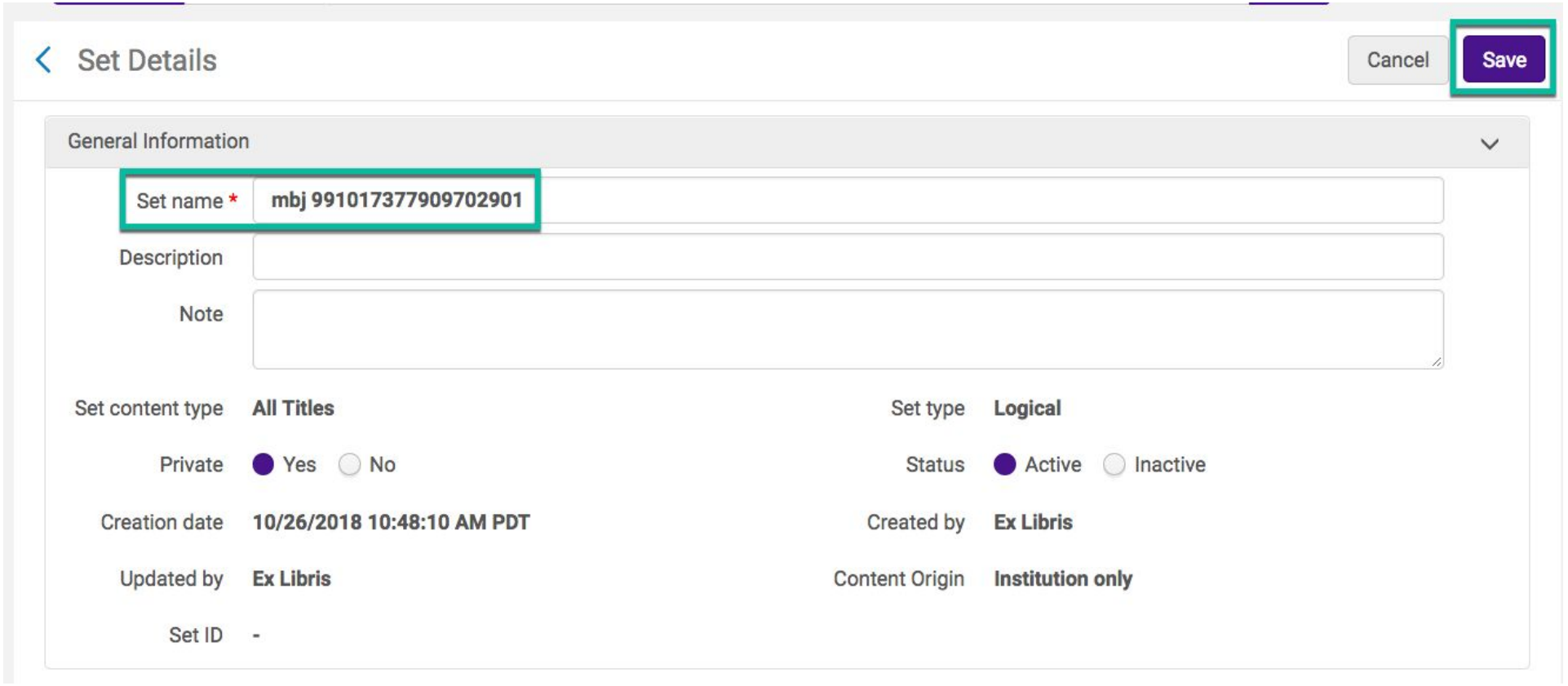


"Physical, Electronic, Digital, Held by" are in gray because this bibliographic record has no inventory and no holdings.

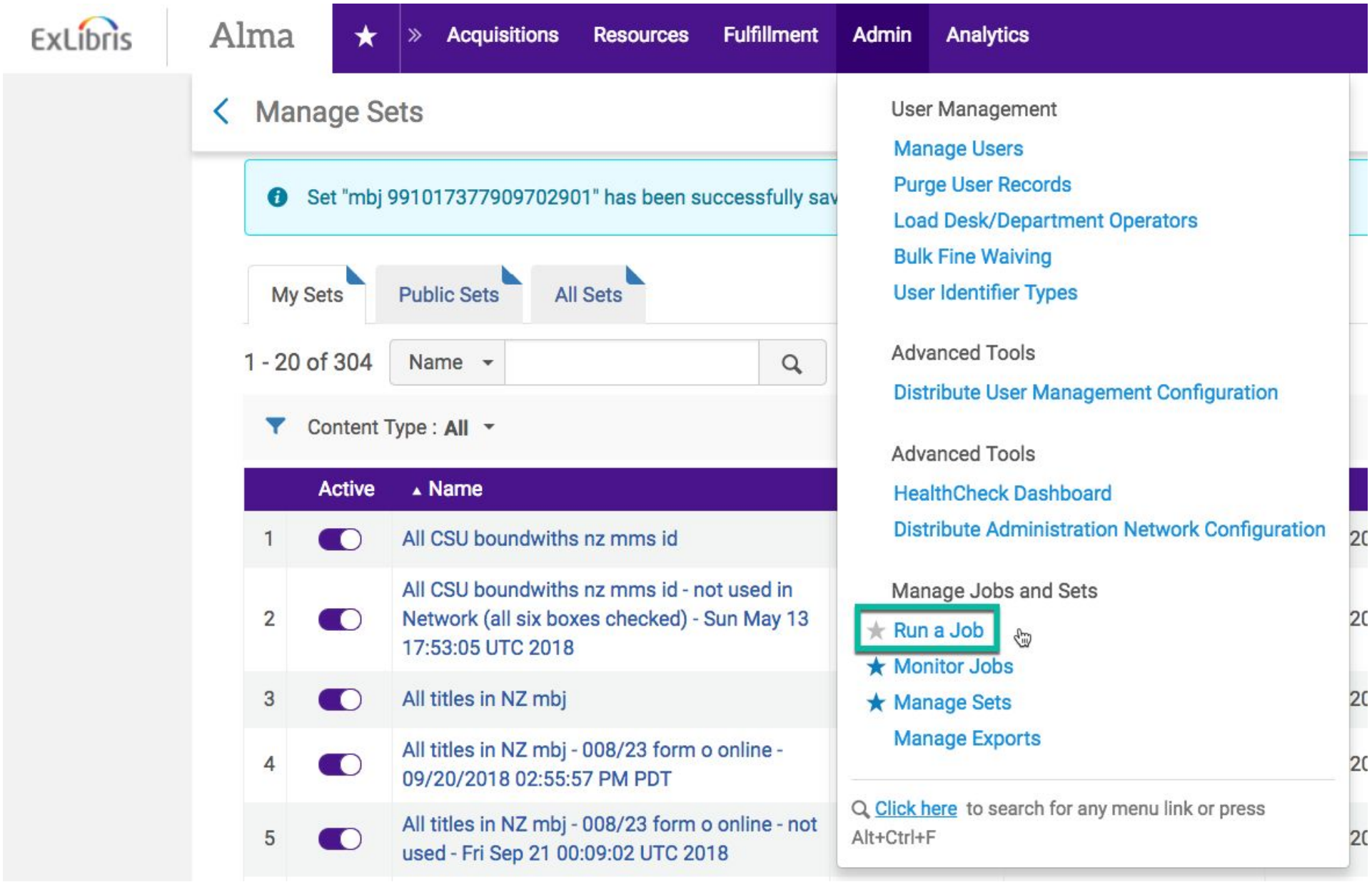
Do not delete the NZ record if Alma indicates that inventory is attached or it's held by any campus.

After you've confirmed that the NZ record does not have inventory or any holdings, Save Query.

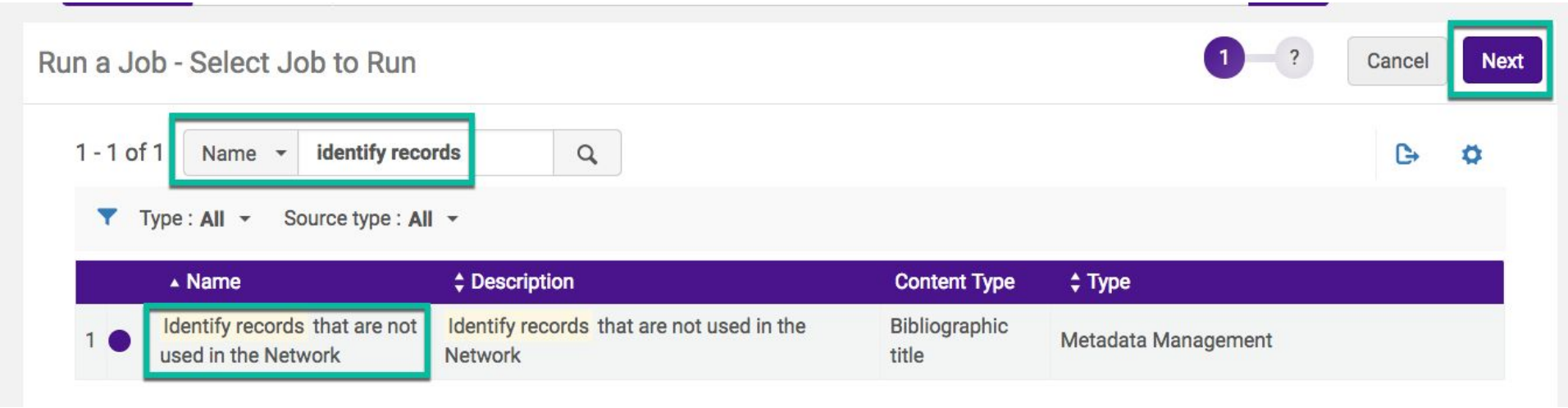
Name your set. (I usually include my initials and the MMS ID as the name of the set.) Save.



Go to Admin, Manage Jobs and Sets, Run a Job.



Search for the job by name: "identify records". Select the job. Next.

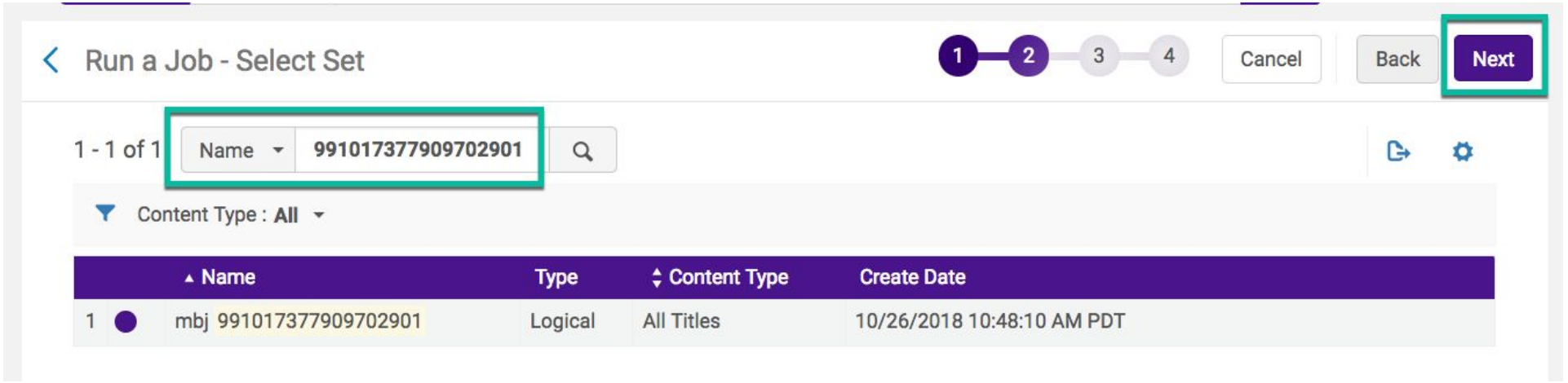


This job will identify NZ records that are not in use.

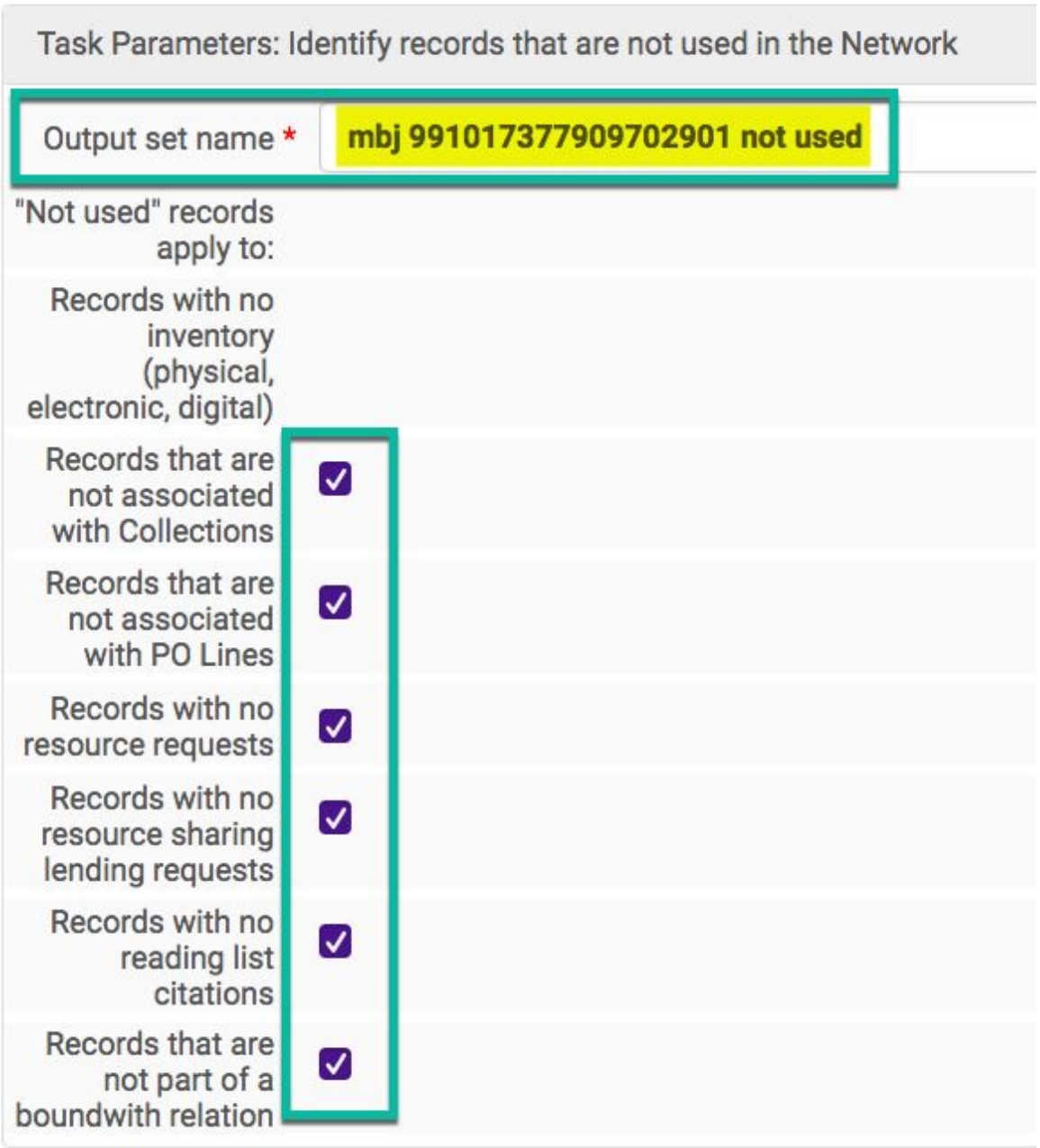
Not in use is defined as bib records without inventory, not associated with a collection, not associated with a PO line, does not have resource requests, does not have resource sharing lending requests, does not have a reading list citation, and not part of a boundwith relationship.

Exlibris documentation:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets#Identify_records_that_are_not_used_in_the_Network

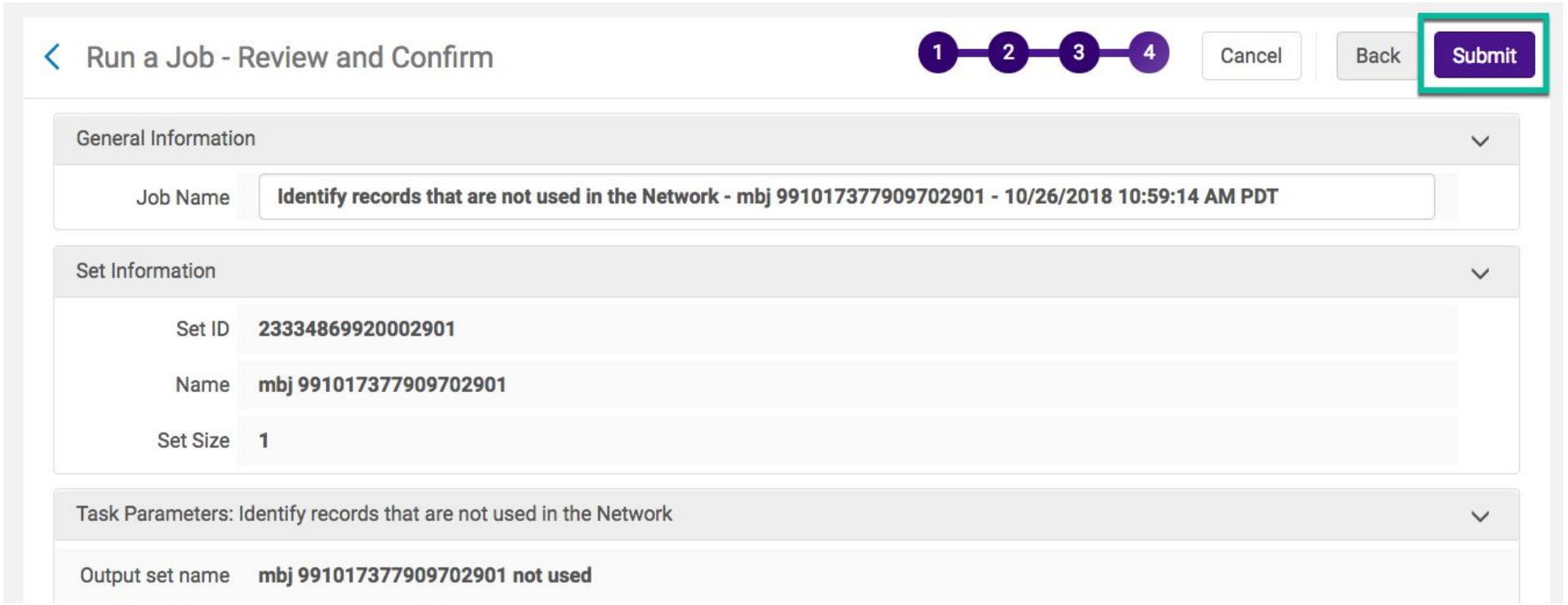
Search for the set you saved earlier. It's easier to locate it if you search by MMS ID. Select the set. Next.



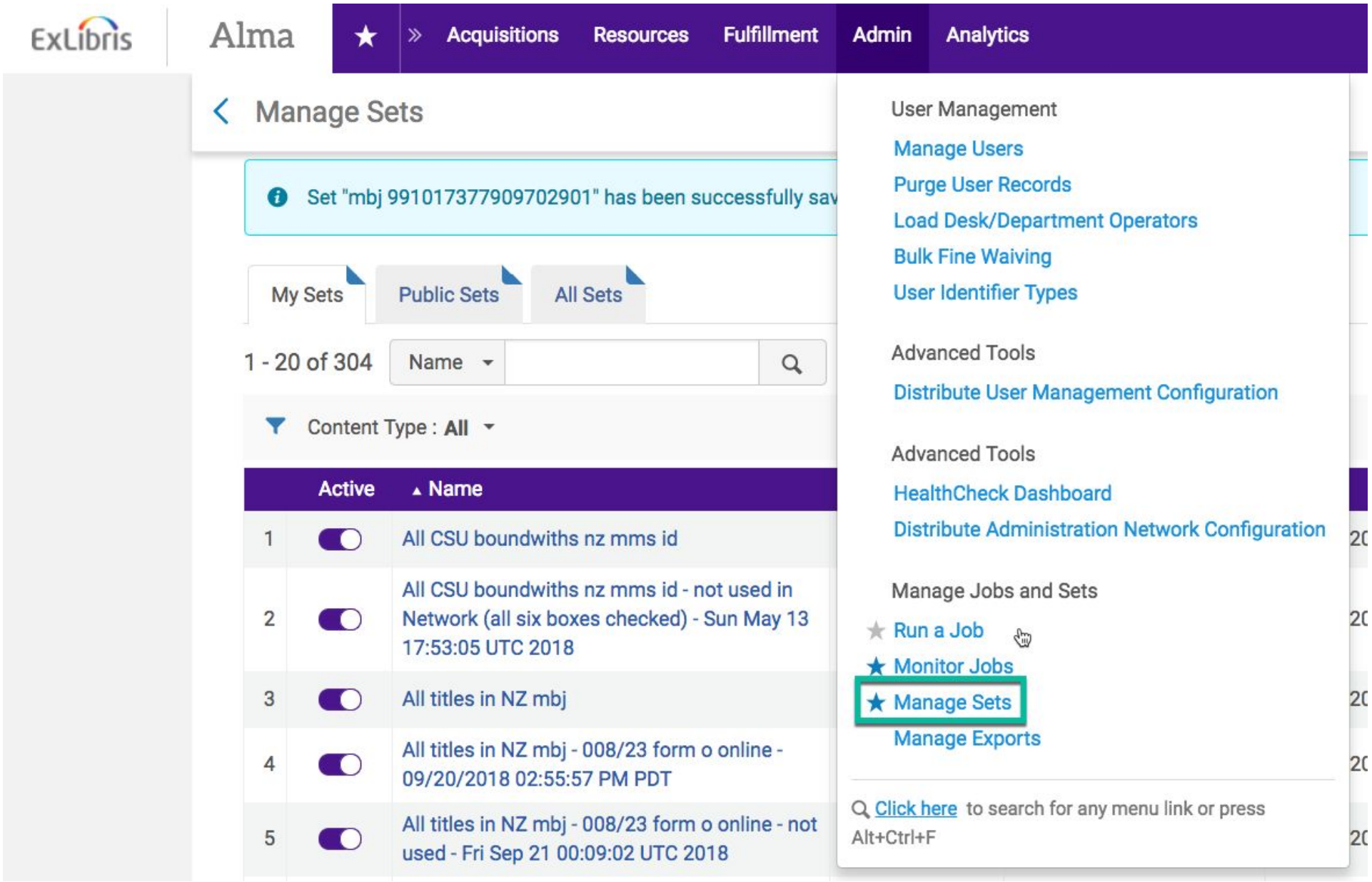
Rename the output set so that it's easier to locate later. Leave all six boxes checked.



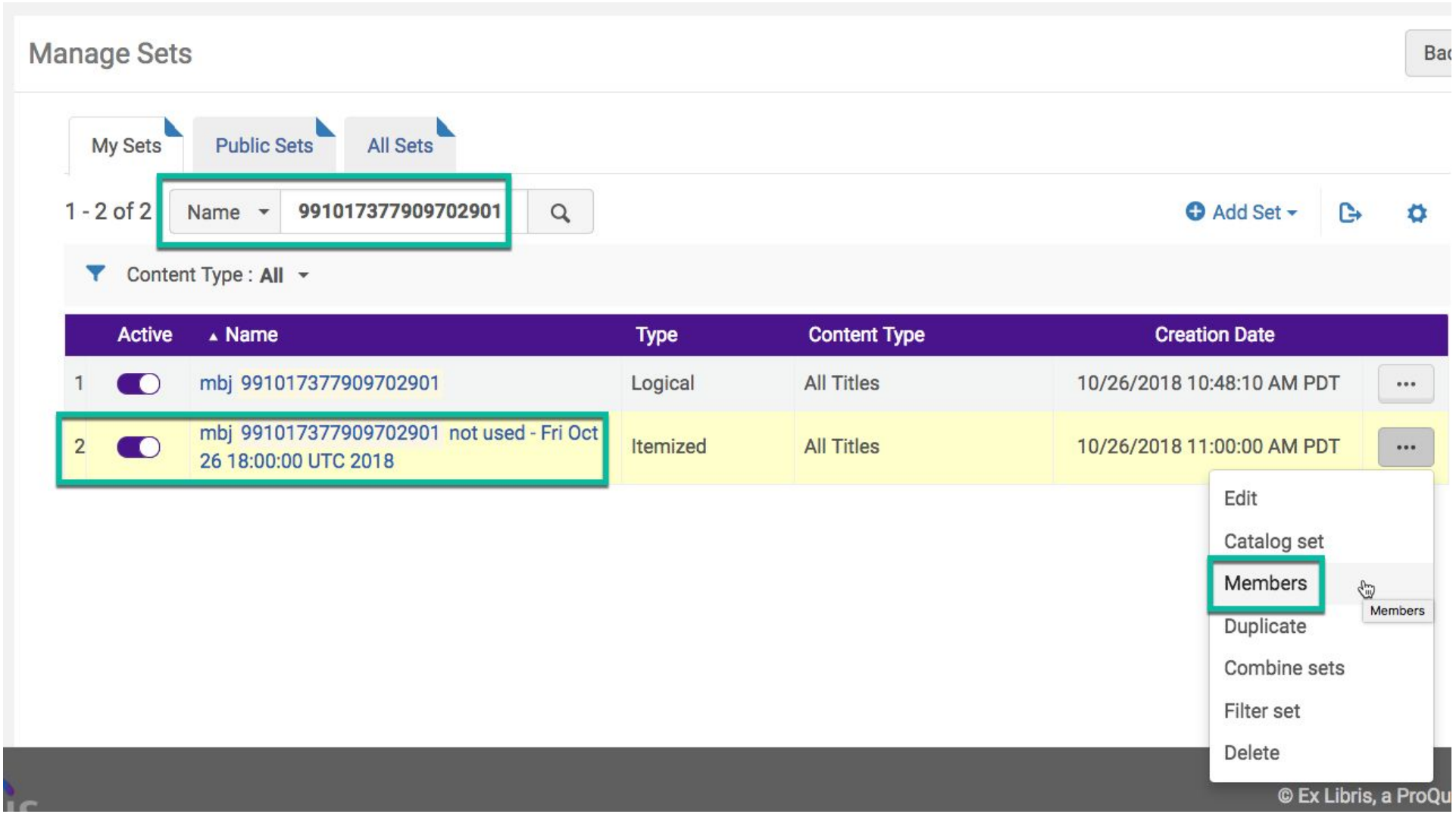
Submit your job, which should take less than a minute.



Go to Admin, Manage Jobs and Sets, Manage Sets



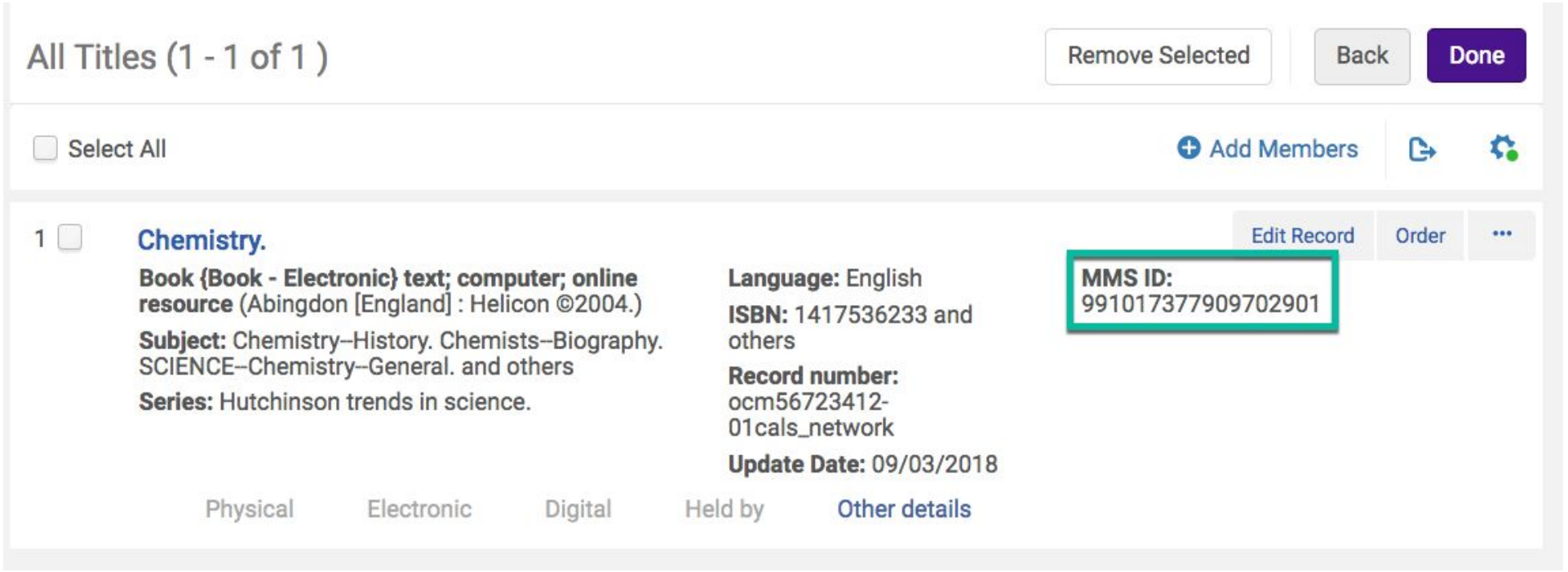
Search for your sets by MMS ID.



Set #2 ("mbj 991017377909702901 not used - Fri Oct 26 18:00:00 UTC 2018") is the resulting set of the "identify" job you ran earlier.

If an NZ record is not in use, it should be in Set #2. To confirm this, click on the … and then Members.

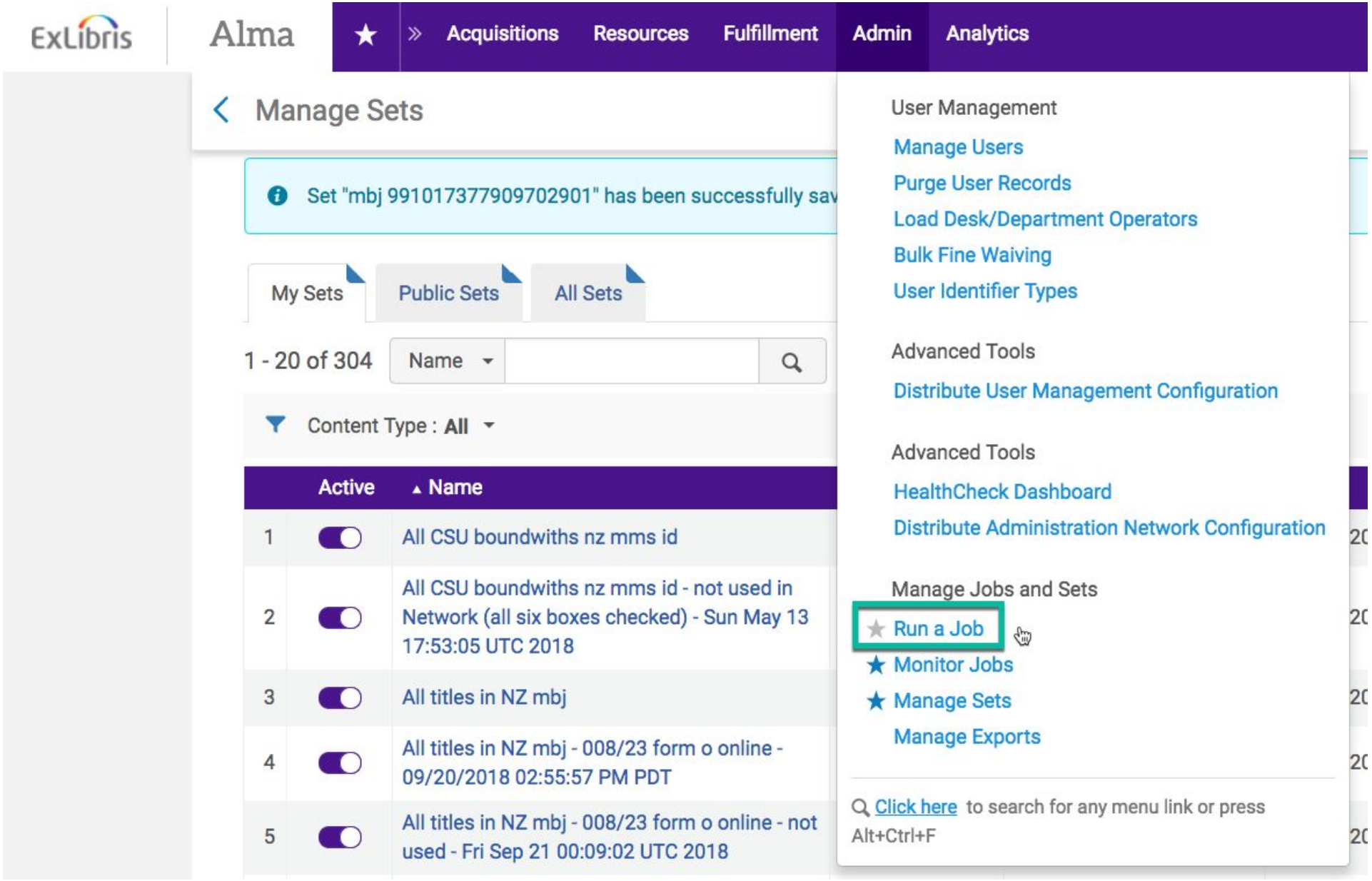
We see that MMS ID 991017377909702901 is in this set so we know it is not in use.



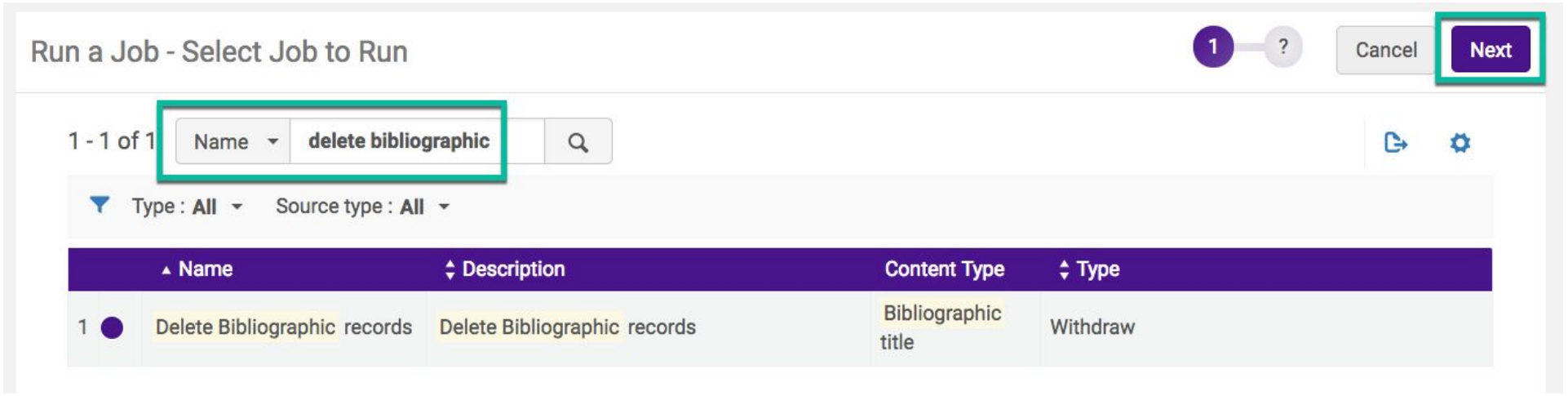
(If this set were empty then we know that the NZ record is being used and should not be deleted.)

We confirmed that MMS ID 991017377909702901 is not in use so now we can delete it.

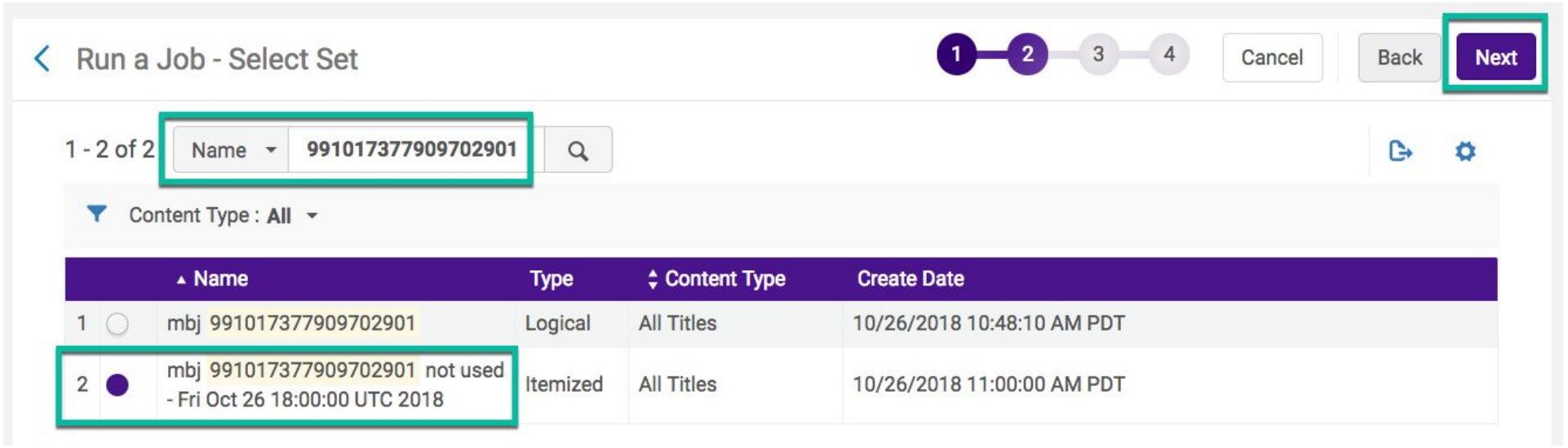
Go to Admin, Manage Jobs and Sets, Run a Job.


ExLibris
Alma
Acquisitions
Resources
Fulfillment
Admin
Analytics
Manage Sets
Set "mbj 991017377909702901" has been successfully sav
My Sets
Public Sets
All Sets
1 - 20 of 304
Name
Content Type : All
Active
Name
1
All CSU boundwiths nz mms id
2
All CSU boundwiths nz mms id - not used in Network (all six boxes checked) - Sun May 13 17:53:05 UTC 2018
3
All titles in NZ mbj
4
All titles in NZ mbj - 008/23 form o online - 09/20/2018 02:55:57 PM PDT
5
All titles in NZ mbj - 008/23 form o online - not used - Fri Sep 21 00:09:02 UTC 2018
User Management
Manage Users
Purge User Records
Load Desk/Department Operators
Bulk Fine Waiving
User Identifier Types
Advanced Tools
Distribute User Management Configuration
Advanced Tools
HealthCheck Dashboard
Distribute Administration Network Configuration
Manage Jobs and Sets
Run a Job
Monitor Jobs
Manage Sets
Manage Exports
Click here to search for any menu link or press Alt+Ctrl+F

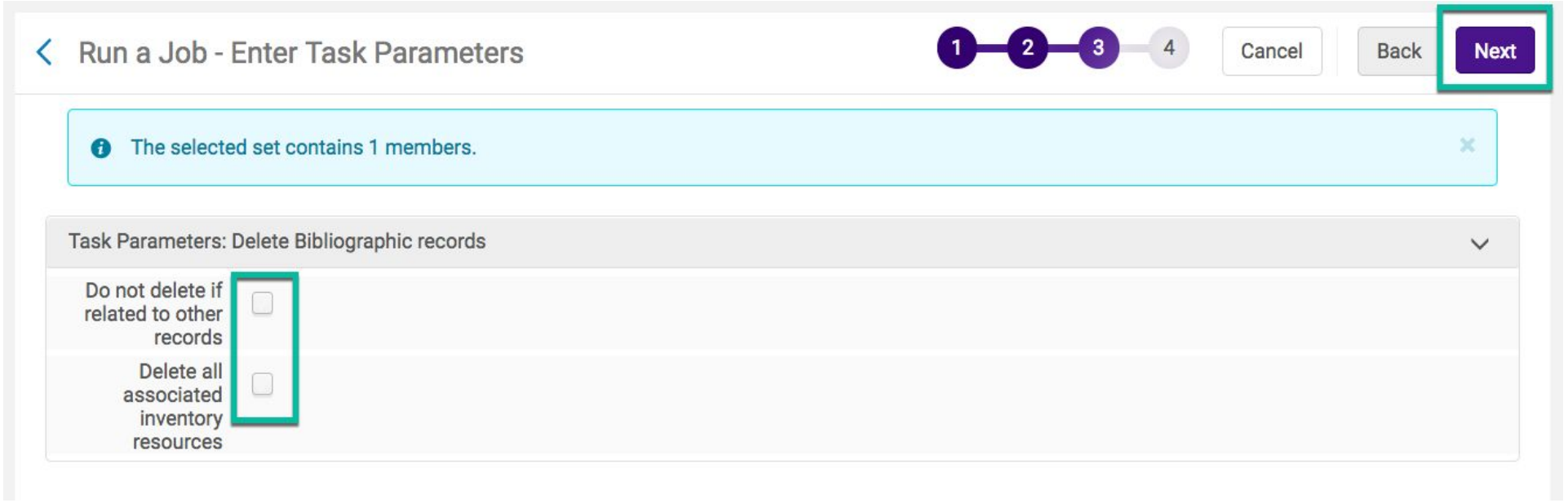
Search for the job's name: "delete bibliographic". Select the job. Next.



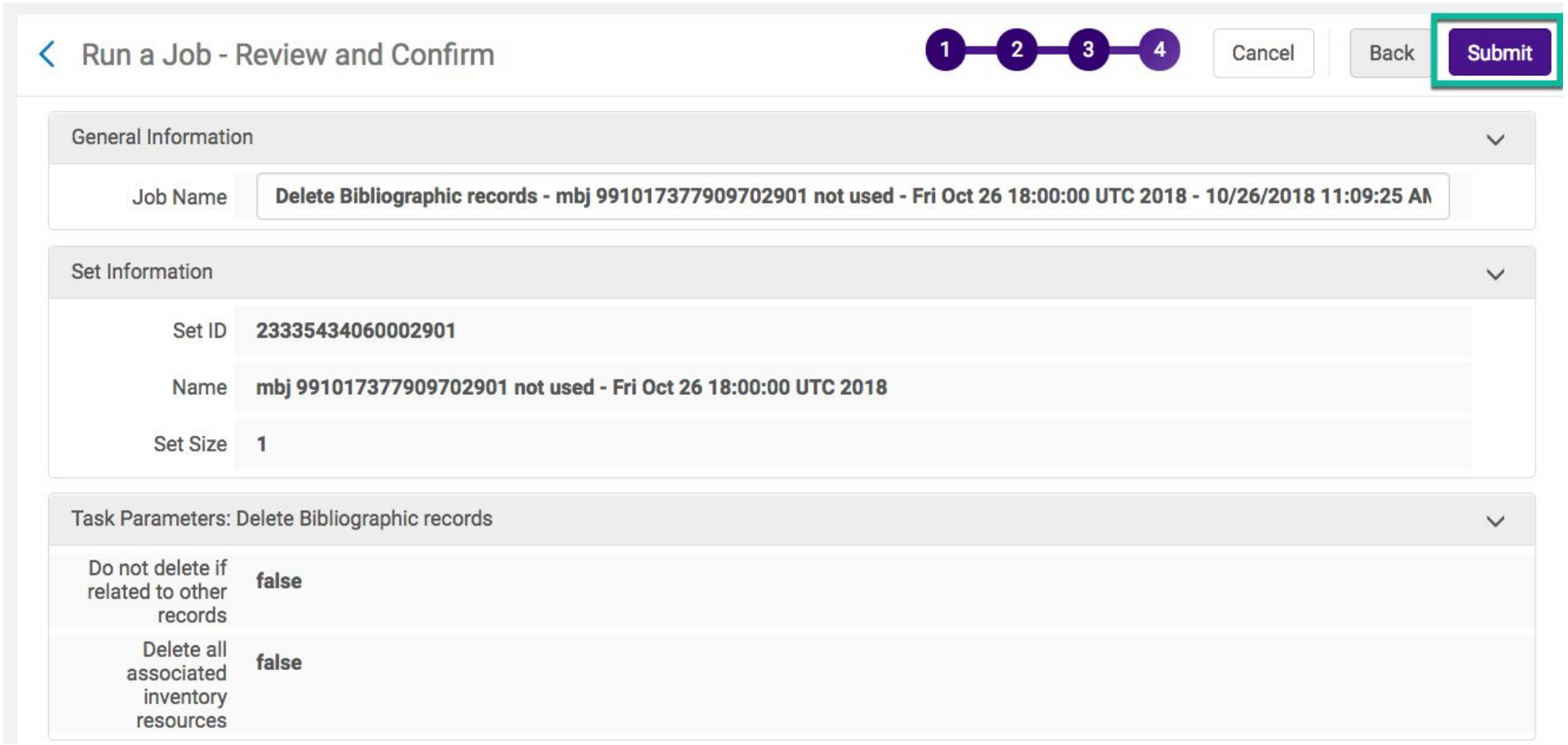
Locate your set by MMS ID. Be sure to select the set with the NZ record confirmed to be "not used". Next.



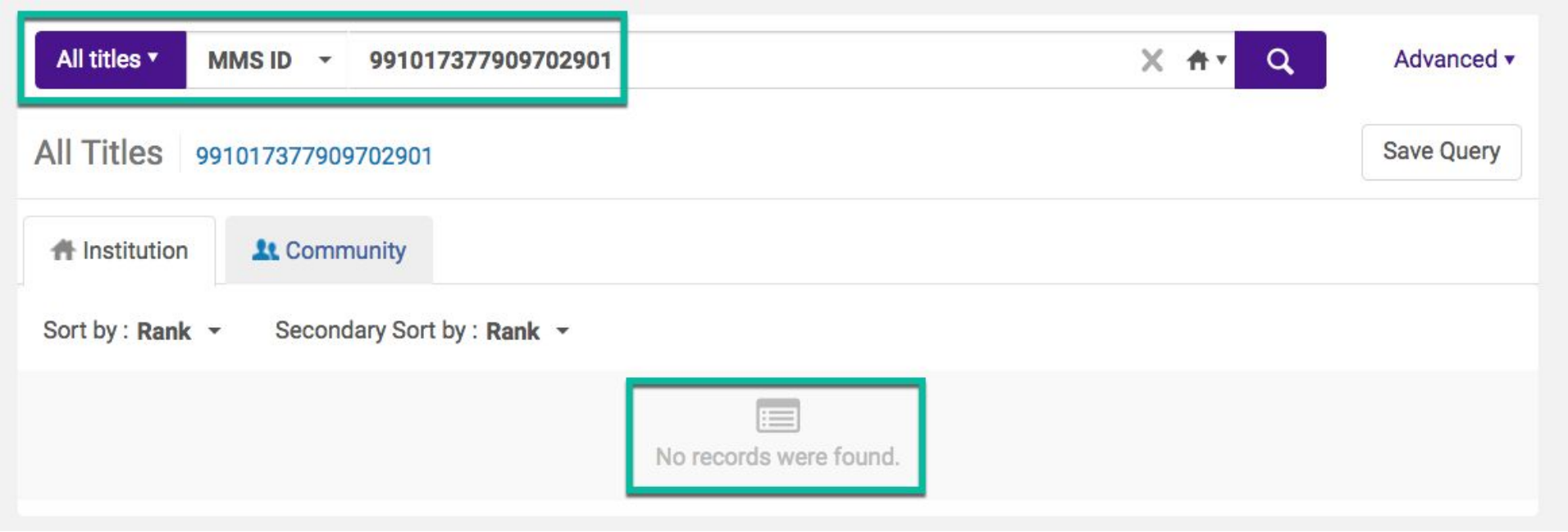
Leave the two boxes unchecked. Next.



Confirm your job and Submit. The job should take less than a minute.



After the job runs, you can confirm that the NZ record is deleted. Searching by MMS ID results in "No records were found".



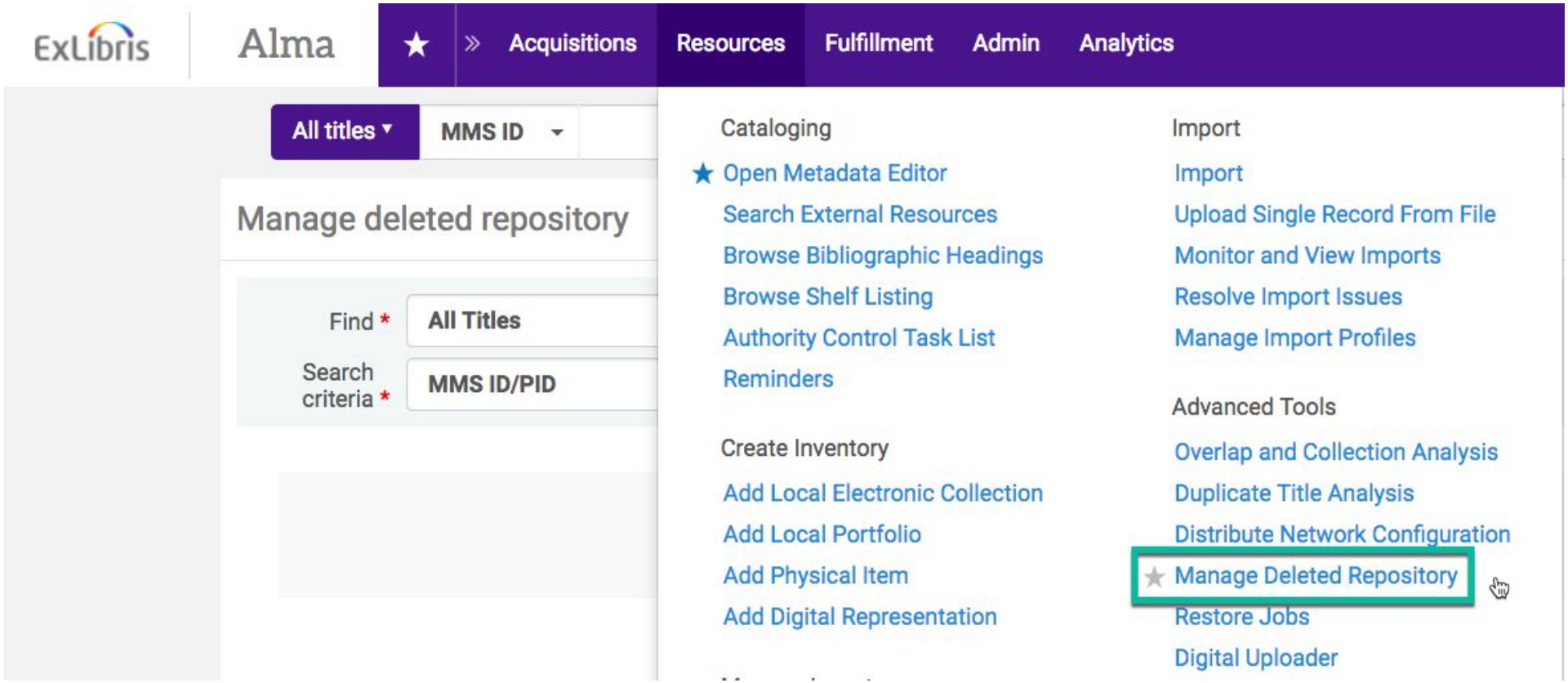
Because of publishing from Alma to Primo and Primo's pipe schedule, the effects of your deleting the NZ record in Primo may take half a day.

In Alma, the Network Publishing Job runs 4 times per day at 3am, 9am, 3pm and 9pm.
In Primo, the Alma-to-Primo pipe runs at 4:30am (indexing at 6am) and 6:30pm (indexing at 9pm).

If you deleted an NZ record by mistake and need to restore it, go to Resources, Advanced Tools, Manage Deleted Repository.

To restore deleted records, you must have the role Repository Manager.

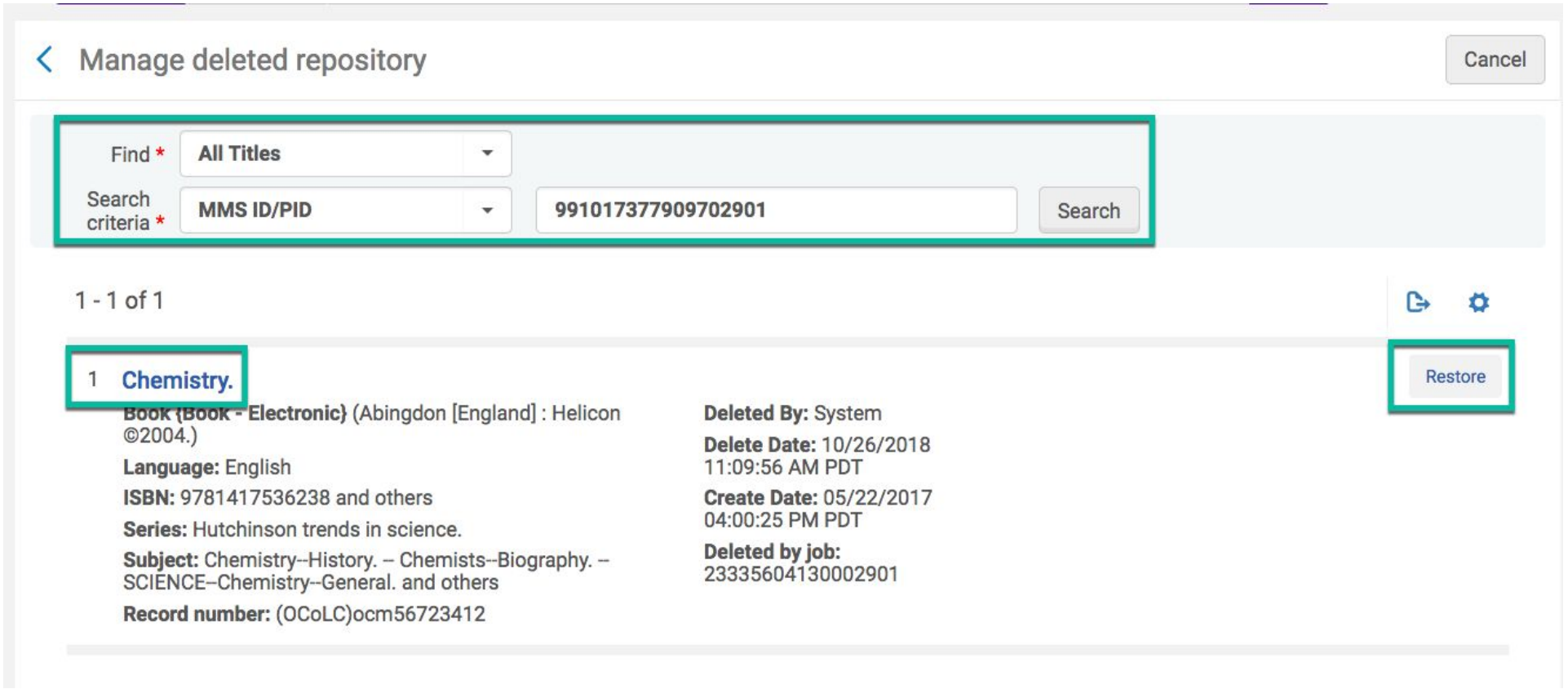
Exlibris documentation:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/070Advanced_Tools/Restoring_Deleted_Records



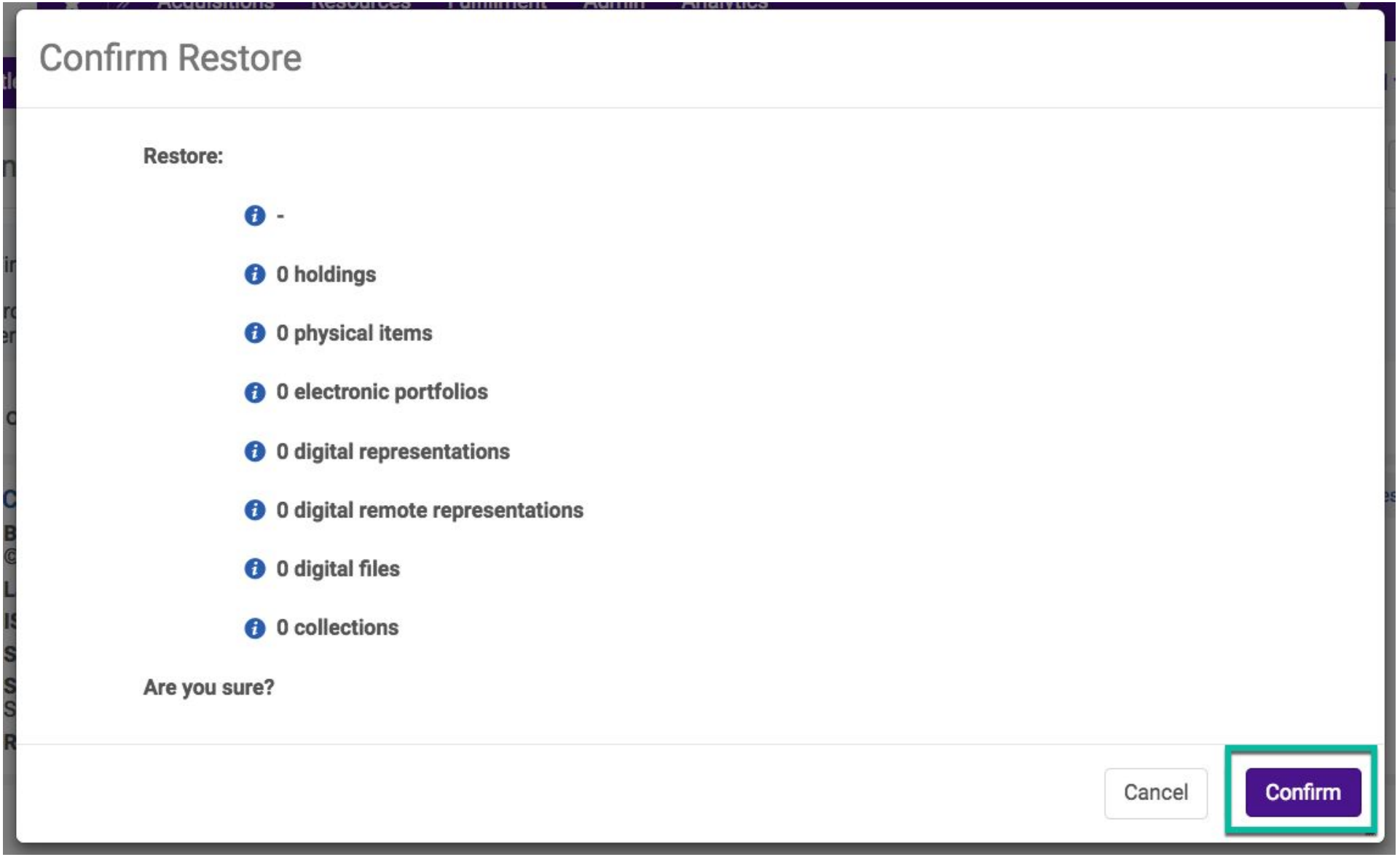
Find: All Titles
Search criteria: MMS ID/PID

Input the MMS ID. Search.

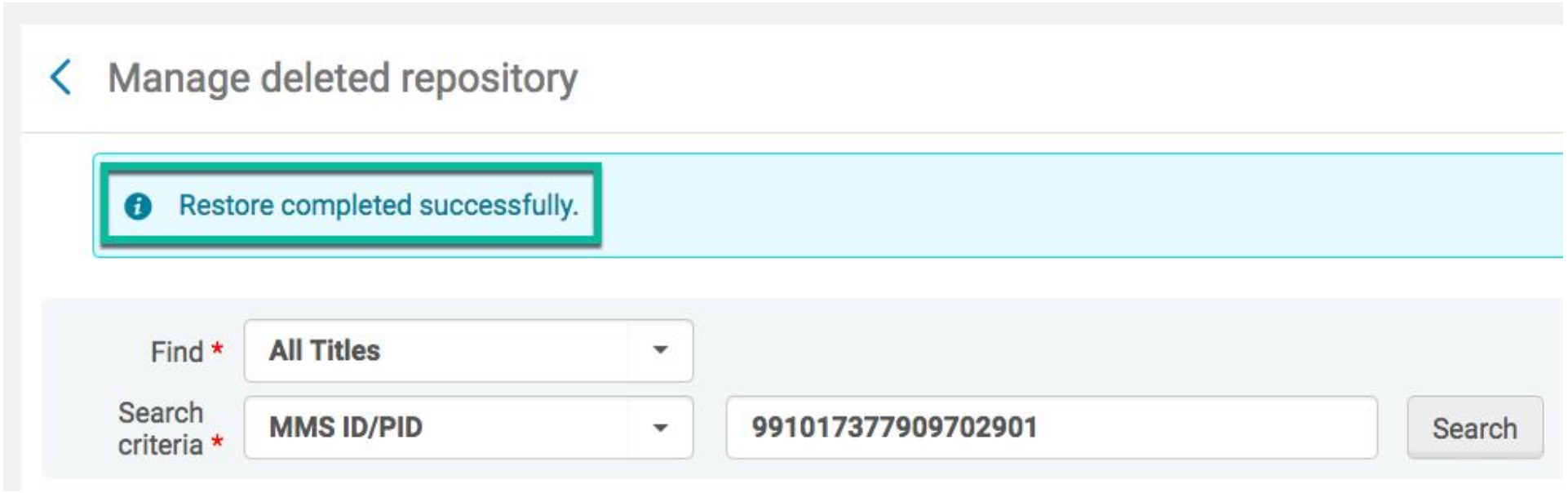
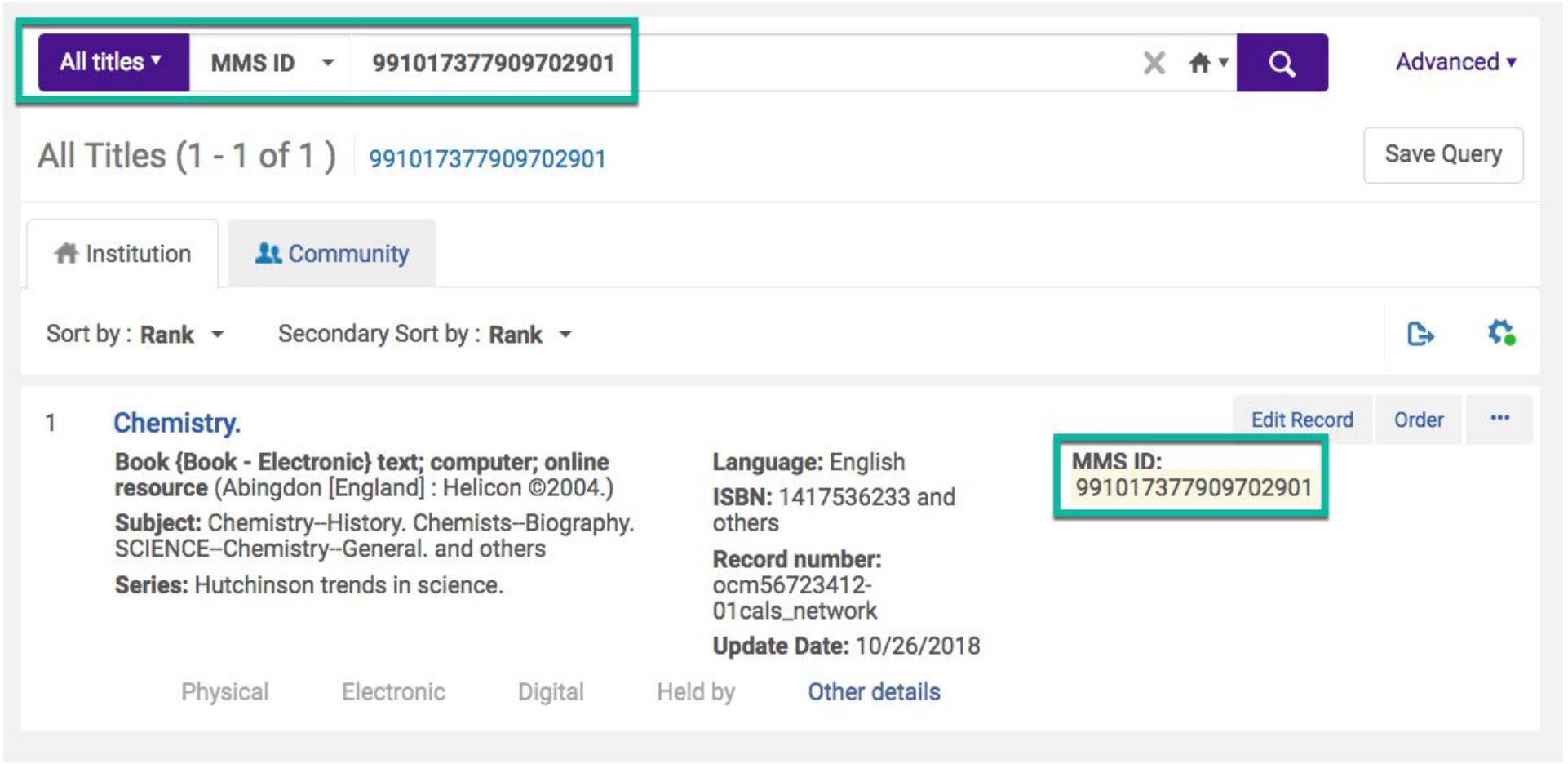
Confirm that you have the correct record. Restore.



Confirm the restoration.



The restoration takes less than a minute and you should see a confirmation message.



After the restoration, MMS ID 991017377909702901 has returned to the NZ.