# One by One,
# I'll Never Get Done:

## Automating the Discard Process in Alma

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# Overview

- The problem; the solution
- Discard workflow
- Analytics preparation
- Day One processes
- Day Two processes
- Summary

# UWG 's Previous Discard Procedure

- We deleted items from the catalog (and removed OCLC holdings) piece by piece
  - We did not have an automated discard process for physical items, only e-books

# So What Changed?

- In Alma, the following developments caused us to reconsider our workflow:
    - A high-priority liaison weeding project that sent hundreds of items to the Technical Services area, typing up carts and work space
    - A campus Surplus office request to provide title lists for surplussed library materials
    - The many mouse clicks required by Alma to delete each item, which caused physical discomfort and reduced efficiency

# UWG's New Discard Procedure

- Our new automated workflow has the following advantages:
    - One cataloger can withdraw ~200 items (~4 carts) in one sitting
    - Errors are reduced or eliminated
    - The only manual repetitive motion is the scanning of the books on the cart and the "Discard" stamping, which can be assigned to others if necessary
    - Carts are not tied up as long in the Technical Services area
    - A title list can be provided to the campus Surplus office
    - The Surplus office's pickup schedule and weekly volume limits are natural brakes on the project, allowing catalogers time to pursue other projects
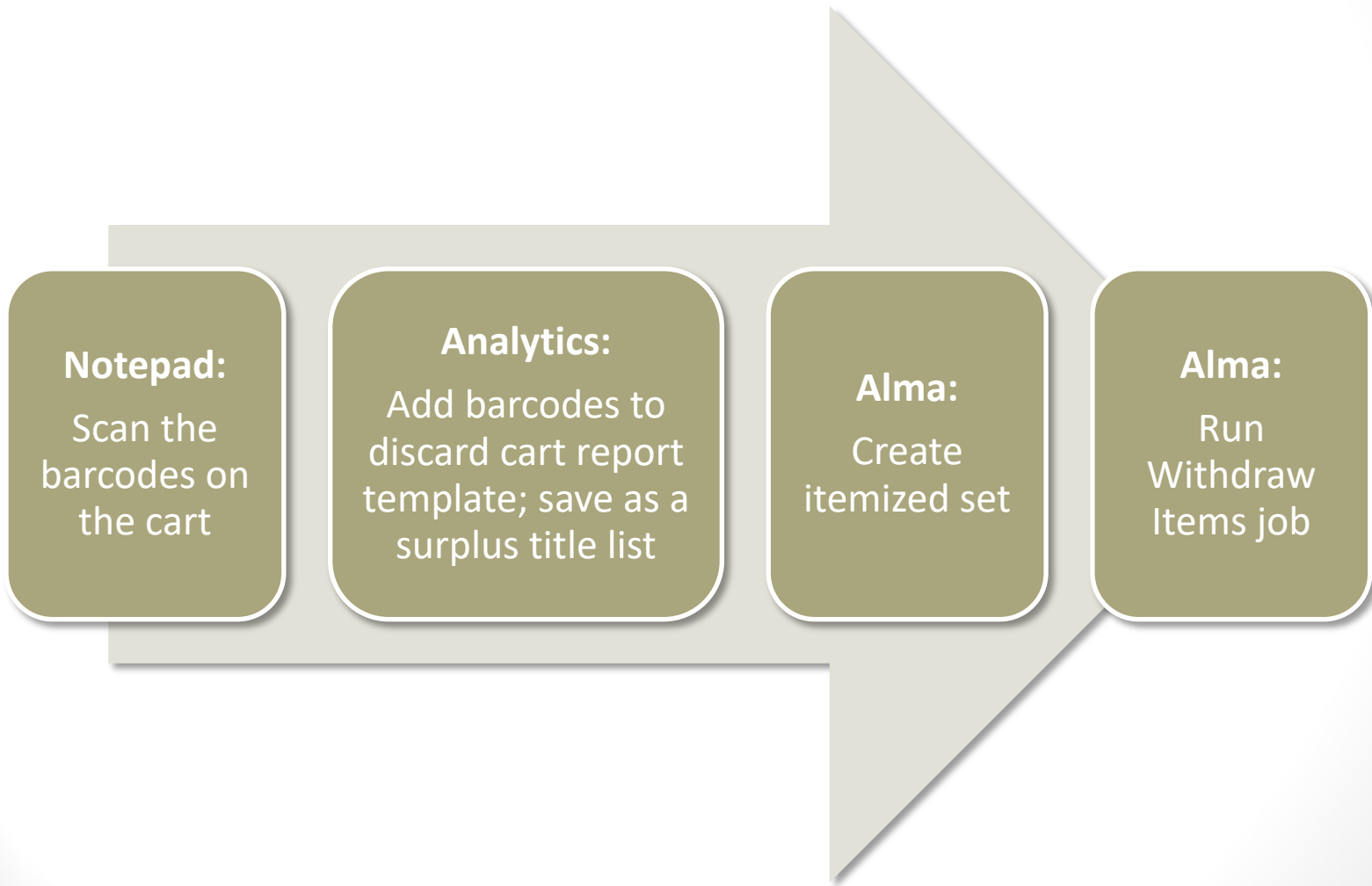
# DISCARD WORKFLOW

# UWG Discard Process

1. Liaison librarians or the Stacks Specialist bring carts of weeded material to Technical Services

2. Catalogers withdraw material and remove OCLC holdings using a two-day process

   - Day One: Withdraw items and bib in Alma via manual job
   - Day Two: Review any exceptions or errors, batch delete holdings in OCLC, and check for USG last copies

3. Catalogers archive surplus title lists and prepare discard carts for pickup by Asset Management staff

**Today's presentation will focus on step 2.**

# Discard Process: Day 1

**Notepad:**
Scan the barcodes on the cart

**Analytics:**
Add barcodes to discard cart report template; save as a surplus title list

**Alma:**
Create itemized set

**Alma:**
Run Withdraw Items job

# Discard Process: Day 2

**Analytics & Alma:** Review any bibs not deleted by Withdraw Items job

**Connexion client:** Batch delete holdings

**Analytics:** Check for USG last copies

**Analytics > Excel:** Request surplus pickup and send title lists to Asset Management office

# ANALYTICS PREPARATION

# Institutional Analytics: Discard Cart Report Template

- This template is the basis for each discard cart's surplus title list
- To ensure easy access by others in Analytics:
  - Save the template in your institution's shared folders
  - Add the template to your Favorites
  - Consider keeping all title lists in a dedicated folder in Analytics, or save them locally

# Discard Cart Template: Fields to Add

- Barcode
  - Add a filter on this column
- Title
- Title (Filing)
  - UWG adds a primary sort to this field and hides the column in the results
- Description
  - UWG renames this field 'Volume/Year' and adds a secondary sort to this field
- Author
- ISBN
- ISSN
- Publisher
- Publication Date
- Process Type
- Lifecycle
- Bibliographic Lifecycle
- MMS ID
- OCLC Control Number (035a)
  - UWG adds conditional formatting* to distinguish OCLC numbers of bib records that were not deleted by the Withdraw Items job

*In the Criteria tab of your report, select OCLC Number (035a) > 'Column Properties' menu option > 'Conditional Format' tab > Add Condition > Bibliographic Lifecycle equals 'In Repository' > Edit Format > 'Style' tab, then decide on your formatting. UWG uses the cell background color #FF0000, a loud bright red.

# NZ Analytics:
# Last Copy Report Template

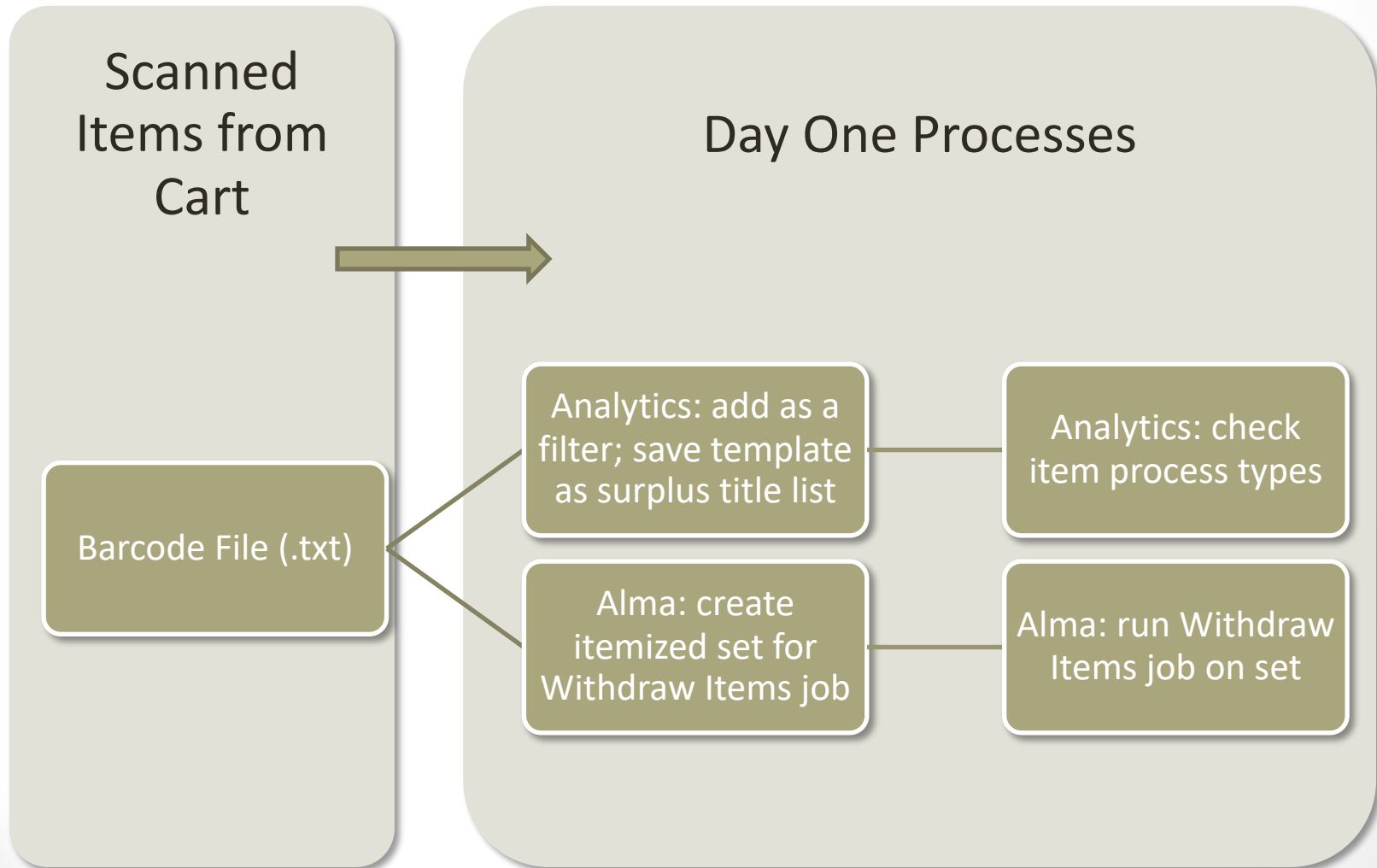| Bibliographic Details | | | Institution |
|---|---|---|---|
| OCLC Control Number (035a) ⚙ | Title ⚙ | Bibliographic Lifecycle ⚙ | Institution Name ⚙ |

- Add these fields to the report:
  - OCLC Number 035a
    - Add a filter on this column
  - Title
  - Bibliographic Lifecycle
  - Institution Name

# NZ Last Copy Report: Tips

- **Do** save your NZ report in a dedicated folder for your institution in Shared Reports > Galileo Network > Reports
- **Don't** access your NZ report from your institutional Analytics (Shared Folders > GALILEO Network > Reports)
  - Why? Per ExL: "When a member institution runs a report acquired from the Network Zone, only data of that member institution is displayed"
- **Don't** add an 'Institutional Name' filter or a 'Bibliographic Lifecycle' filter to your NZ report
- **Don't** open NZ Analytics and your institutional Analytics  at the same time in the same browser

# DAY ONE PROCESSES

# "Day One" Basis of Activity: Barcode File

**Scanned Items from Cart**

**Day One Processes**

Barcode File (.txt)

Analytics: add as a filter; save template as surplus title list

Analytics: check item process types

Alma: create itemized set for Withdraw Items job

Alma: run Withdraw Items job on set

# Before you Begin…

- Tape a numbered slip to the cart, which will also be the name of your surplus title list

- This slip will follow the discard cart on its journey through the discard process
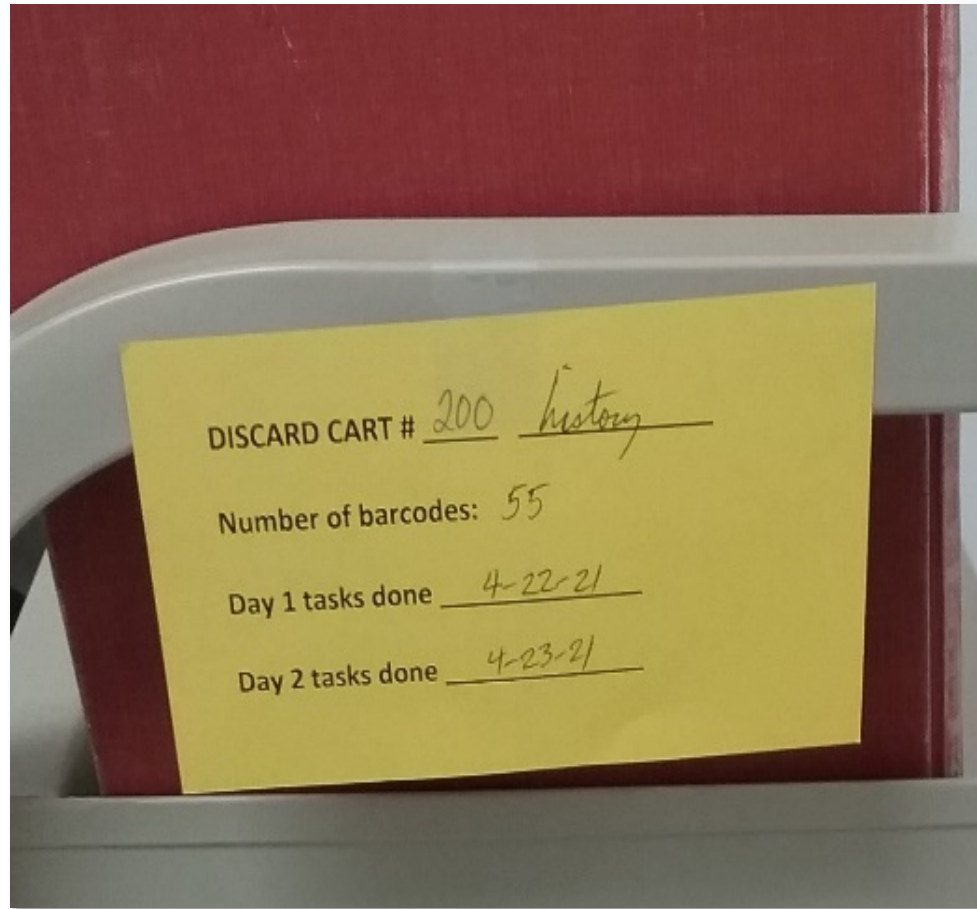
# Create Barcode File

- Scan the items on your cart into a Notepad++ file
  - Add the heading: Barcode
  - Scan one barcode per line
  - After scanning, compare the number of barcodes in your file with the number of items on your cart
- This file will be used to
  1. Build the Alma set for the Withdraw Items job
  2. Create the surplus title list for that cart

```
 1  Barcode
 2  50704001478953
 3  50704001176342
 4  50704001898697
 5  50704001898705
 6  50704001980768
 7  50704001980776
 8  50704011118714
 9  50704011118904
10  50704011118870
11  50704011118755
12  50704011119282
13  50704011118839
14  50704011118797
15  50704011118672
```

# Create Surplus Title List

- Paste the barcodes into the discard cart report template and "save as" to create your surplus title list
  - Example: UWG uses the naming convention *discard cart 27 EDUCATION,* based on the cart slip
  - This surplus title list will be the basis of your Day Two processes (more on this later)

# Resolve Item Process Types

Any assigned process types should be resolved before withdrawing the items from Alma. Here is what UWG does:

| Process Type | How to Resolve |
|---|---|
| Acquisition, Missing, Technical-Migration | If no notes in item record, scan in item* and return to cart |
| Requested, Transit, Lost, Lost & Paid, Claimed Returned, On Hold Shelf, Loan | Refer to Circulation department; scan in item if directed to do so |
| In Process | 1. Scan in item to see current work order department<br>2. Refer to appropriate staff, or clear the In Process status if permitted to do so |

*Fulfillment > Resource Requests > Scan In Items

# Create Alma Set

- **Admin > Manage Jobs and Sets > Manage Sets**
- Click Add Set > Itemized, and enter the following parameters:
  - ✓ Set name: [same as your Notepad file]
  - ✓ Set content type: Physical items
- In the File box at the bottom, browse to your Notepad++ file
- Click *Save* to submit a job to add members to the set
- The system will email a report when the set is ready
  - Check the "Records with exceptions" value in the report to see any errors

| | |
|---|---|
| **Process ID** 4966127740002961 | **Name** Add Members to Set |
| **Started on** 04/22/2021 06:07:55 PM EDT | **Finished on** 04/22/2021 06:08:04 PM EDT |
| **Total run time** 8 Seconds | **Created by** 917329679 |
| **Status** Completed with Warnings | **Status date** 04/22/2021 06:08:04 PM EDT |
| **Records processed** 48 | **Records with exceptions** 1 |

## Counters

| | |
|---|---|
| Set name: | discard cart 197 VHStapes |
| Total added to set: | 47 |
| Non-matched Records: | 1 |
| Total failed for technical reasons: | 0 |
| Download error file: | sets-4966127740002961.csv |

# Add Members to Itemized Set: Job Report

Non-matched records are usually due to an absent or incorrectly entered barcode. For more information about these items, check the error file: Navigate to **Admin > Monitor Jobs > History;** search for the job ID (listed in the email as "Process ID"); then click the *Action* button and select *Report* to download the error file.

# Run Withdraw Items Job

- **Admin > Manage Jobs and Sets > Run a Job > Withdraw Items**
  - ✓ Select the set you created previously
  - ✓ Parameters: Delete holdings; delete bibliographic records that have no other holdings
- The system will email a report when the job completes
  - If any items are listed in the "Report Table" section of the report, double-check them on Day Two (after Analytics is updated with the bib lifecycle information)

## Report Table

| Error Type | Barcode |
| --- | --- |
| Item has chron | 50704000516167 |
| Item has enum | 50704000399085 |
| Item has enum | 50704000399077 |
| Item has PO Line | 50704013124538 |

# Withdraw Items: Job Report

- Items with enumeration or chronology are deleted by the Withdraw Items job

- Items linked an active PO line are **not** deleted by the Withdraw Items job

# Wait 24 hours for the ETL process to update data in Analytics

# DAY TWO PROCESSES

# "Day Two" Basis of Activity: Surplus Title List



Analytics Report from Day One

Day Two Processes

Surplus title list

Investigate any bibs that were not deleted by the Withdraw Items job

Batch delete OCLC numbers in Connexion client

Check for last copies using NZ Analytics report

Submit pickup request to Surplus office

Email title lists to Surplus office
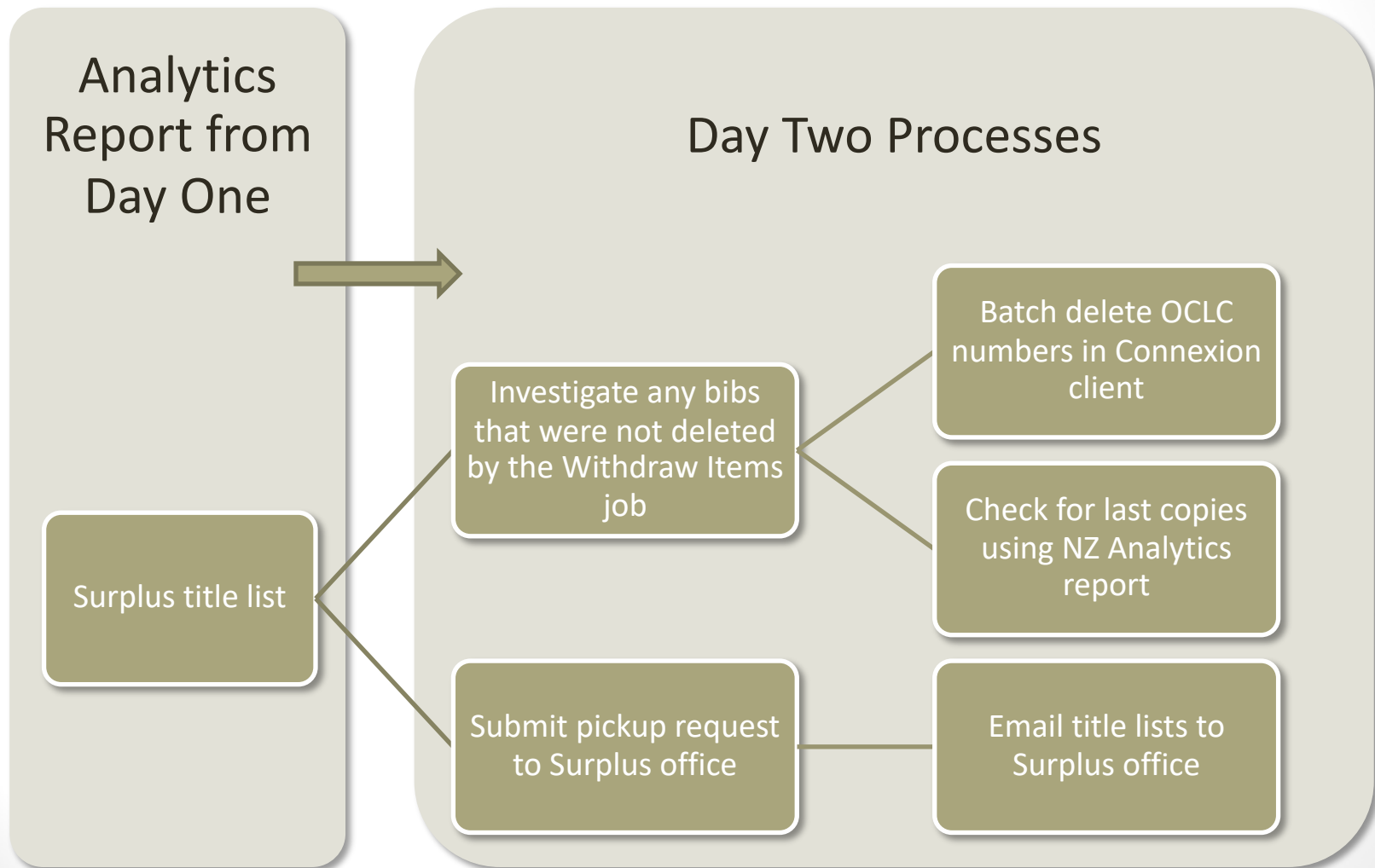
# Prepare OCLC Number File

- Copy the OCLC numbers from the surplus title list, to a Notepad file
  - Enter the numbers only; the system will ignore any characters preceding the OCLC numbers
  - If the surplus title list shows that any bib records were not deleted, investigate those bibs before adding their OCLC numbers to your Notepad file
    - The example below shows UWG's conditional formatting for the 'OCLC Control Number (035a)' field

🌐 **discard cart 198 history**          Home   Catalog   Favorites ▼   Dashboards ▼   Create ▼   Open ▼

**discard cart 198 history**

| ENTER BARCODES HERE | Title | Volume/Year | Author | ISBN | ISSN | Publisher | Publication Date | Process Type | Lifecycle | Bibliographic Lifecycle | MMS Id | OCLC Number |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 50704001478953 | The Spanish empire in America / | | Haring, C. H. 1885-1960. (Clarence Henry), | | | Harcourt Brace & World | 1963. | None | Deleted | In Repository | 991785144602961 | 16275799 |
| 50704001176342 | Between Maule and Amazon | | Toynbee, Arnold, 1889-1975. | | | Oxford UP | 1967. | None | Deleted | Deleted | 991473104602961 | 754215 |
| 50704001898697 | The Borzoi reader in Latin American history. | VOL. 1 | Delpar, Helen, compiler. | 9780394311517; 0394311515; 9780394317021; 0394317025 | | Knopf | [1972]- | None | Deleted | Deleted | 992243794602961 | 323653 |

# Review any Bibs not Deleted by Withdraw Items Job

Here are some common scenarios identified at UWG:

| Situation | How to Fix | Delete OCLC Holdings? |
|-----------|------------|-----------------------|
| Missing or lost items remain on the bib. | Suppress the bib and delete OCLC holdings in accordance with UWG lost and missing procedures. | Yes |
| Additional volumes of a multi-part monograph remain on the bib, but the 866 summary holdings need to be updated. | Give the discarded item(s) to the serials cataloger to update the 866 and the OCLC LHR. | No |
| Additional copies remain on the bib. | No fix required! | No |

# Connexion Client Preparation

- **Tools > Options > Authorizations**
  - Make sure you have an authorization set as the default
- **Tools > Options > Batch**
  - Check box next to "Display batch reports automatically" and, optionally, "Print batch reports automatically"
- For more information on batch processing, refer to the Connexion client documentation

# Batch Delete OCLC Holdings

**Batch > Holdings by OCLC number**

1. Browse to your OCLC number text file and click *Import*
2. Decide if you want to delete the source file
3. Tick the box next to *Delete Holdings,* and click *OK*
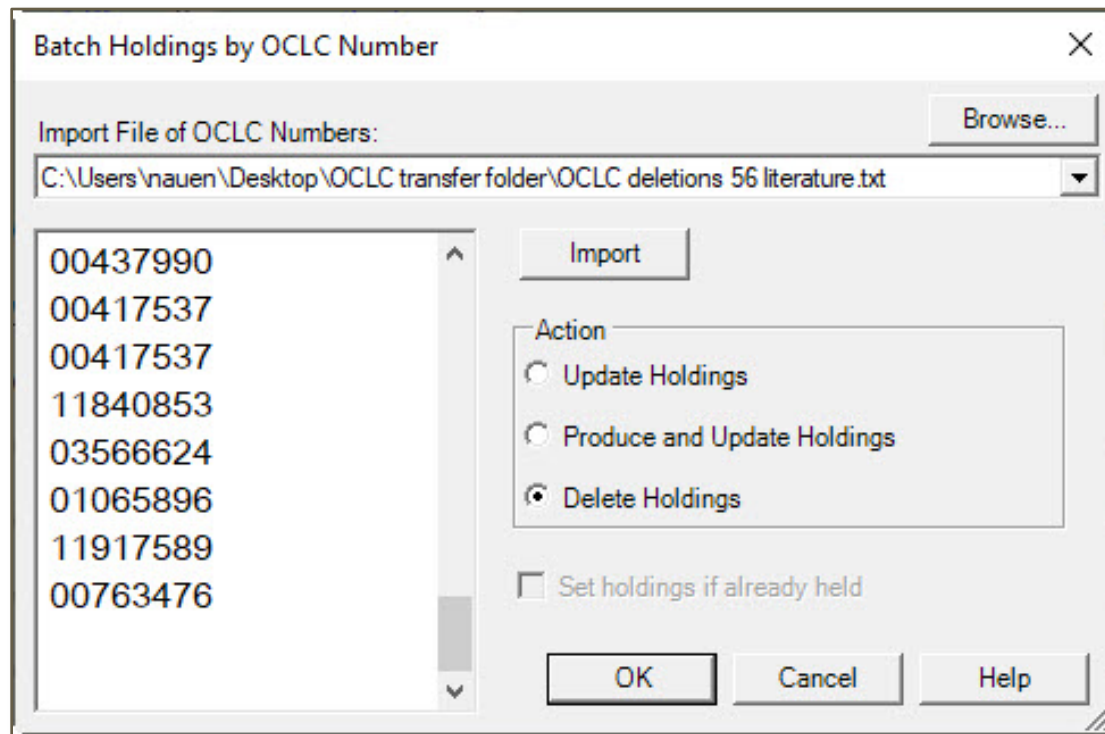
# Batch Delete OCLC Holdings (cont.)

- After the system deletes your holdings, a confirmation report will display in the client, which will also alert you to any errors

## Batch Holdings by OCLC Number Report

| | |
|---|---|
| Session ID | cnxs01.prod.oclc.org-38214-k0go87yc-k0r3hx |
| Report Start Time | 2019-09-12T08:30:34-04:00 |
| Session Duration | 00:00:17.5891608 |

| | |
|---|---|
| Bibliographic exports reported | 0 |
| Authority exports reported | 0 |

### Successful Actions (44)

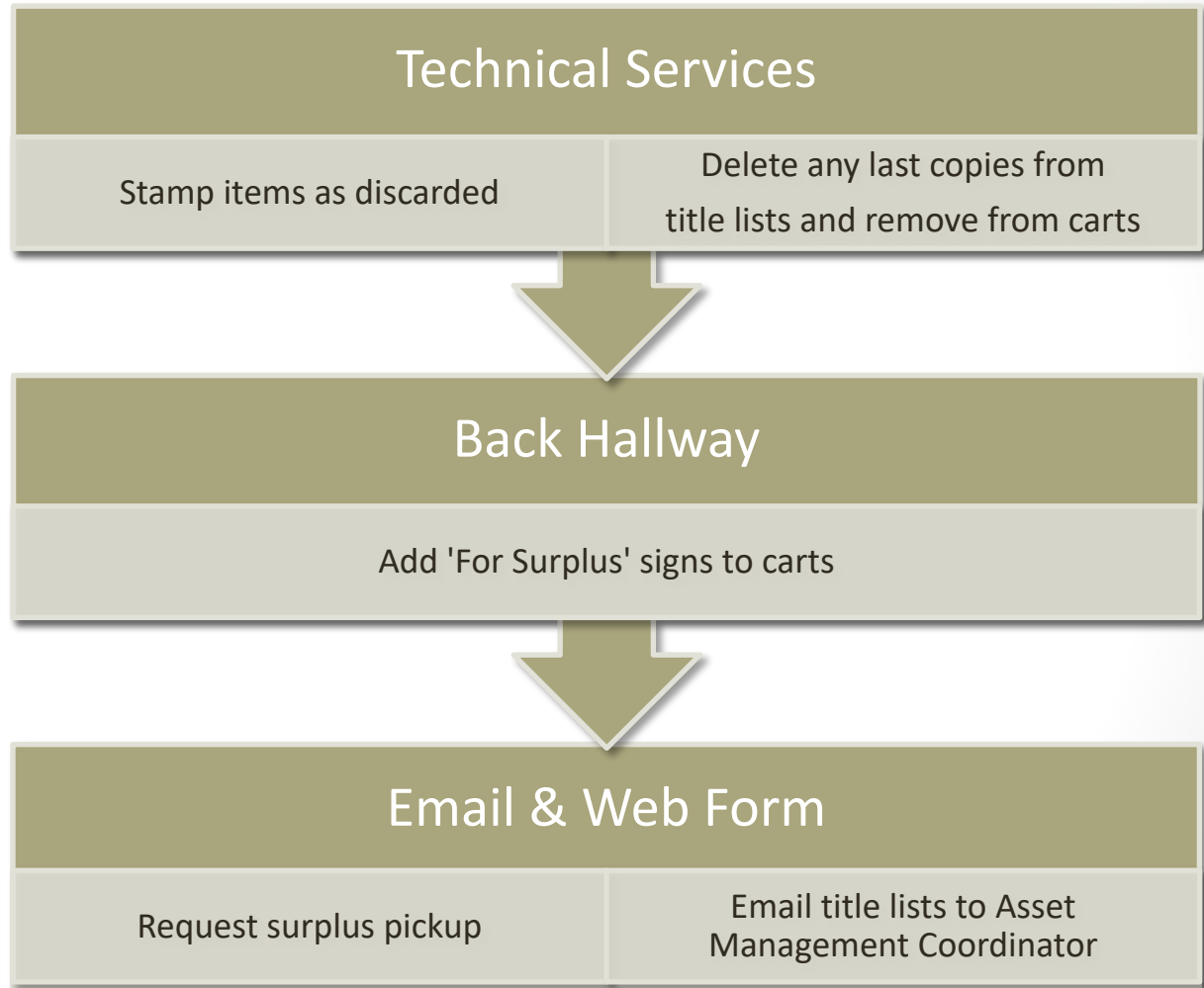| Control # | Title | Record Action |
|---|---|---|
| 01067938 | Anthology of modern Hebrew poetry, selected by S.Y. Penueli and A. Ukhmani. | DeleteHoldings |
| 02696272 | Architects of Yiddishism at the beginning of the twentieth century : a study in Jewish cultural history / Emanuel S. Goldsmith. | DeleteHoldings |
| 02632601 | Ashes out of hope : fiction by Soviet-Yiddish writers / edited by Irving Howe and Eliezer Greenberg. | DeleteHoldings |
| 00817387 | Asian PEN anthology / edited by F. Sionil Jose and with an introduction by Norman Cousins. | DeleteHoldings |
| 00346891 | Dun Karm, poet of Malta. / Texts chosen and translated by A.J. Arberry. | DeleteHoldings |
| 00325381 | East river : a novel / Translation by A.H. Gross. | DeleteHoldings |

# Check for Last Copies

- **Last Copy in Georgia policy** is available on the **Cataloging wiki**

- The last copy check can be done at any point in the discard process; do what works for your institution

- You can also check last copies using the Last Copy app; ask GIL Support for details

# NZ Analytics: Last Copy Report

- To check for last copies, open your NZ report and paste your OCLC numbers into the 'OCLC Control Number 035a' filter
- A last copy will show either as a single row (see highlighted example below) or as multiple rows, each with a Bib Lifecycle of 'Deleted'



| 747105 | In search of Ali Mahmoud : an American woman in Egypt / | Deleted | University of West Georgia |
| | | In Repository | Savannah State University |
| | | | South Georgia State College |
| | | | University of Georgia |
| 7580027 | Institutiones : book II, chapter V / | Deleted | University of West Georgia |
| 7836024 | Modern Mauritius : the politics of decolonization / | Deleted | University of West Georgia |
| | | In Repository | Columbus State University |
| | | | Georgia State University |
| | | | University of Georgia |

# Prepare Carts for Pickup by Asset Management (aka "Surplus Office")






Transfer of Equipment Form
Asset Management

## Technical Services

| Stamp items as discarded | Delete any last copies from title lists and remove from carts |

⬇

## Back Hallway

Add 'For Surplus' signs to carts

⬇

## Email & Web Form

| Request surplus pickup | Email title lists to Asset Management Coordinator |

Photo credits: Miriam Nauenburg

# SUMMARY

# Tips and Tricks

- In Analytics, save your discard cart report template as a Favorite in one of your institutional shared folders

- Handle any assigned process types before running the Withdraw Items job

- Check the following job reports and handle any problems before proceeding:

  - 'Add Members to Itemized Set' job report, to confirm that all scanned barcodes from your cart were added to the set

  - 'Withdraw Items' job report, to confirm that all items in your set were withdrawn from Alma

  - OCLC holdings deletion report, to confirm that all OCLC holding were removed

- When checking last copies, access your NZ Analytics report from the NZ, not your institutional Analytics

# QUESTIONS?