

Basic Deletes

Friday, August 23, 2024 12:58 PM

(Documentation from: Jessica S. Scott, Ex Libris, and Alma Knowledge Assistant)

Single Portfolio
Single Record
Batch Portfolios
<ul style="list-style-type: none"> • Using Jobs • Within Collections • Using Profiles
Batch Records
<ul style="list-style-type: none"> • Using Jobs • Using Profiles
Collections
Digital
<ul style="list-style-type: none"> • Digital Representation • Collection

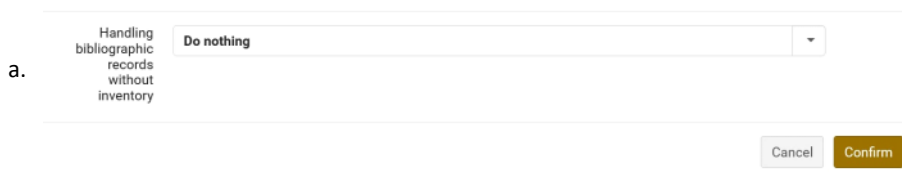
Single Portfolio

1. Bring up the portfolio that you would like to delete.
2. Under the ellipses select **Delete**.



3. When you hit delete a Delete confirmation box will appear asking you to confirm on of the choices by "Handling bibliographic records without inventory". This is asking what you'd like to happen to the bibliographic the portfolio is attached to if it will no longer have inventory after you delete the portfolio. Select the best option for your situation.

Delete confirmation



- b. Handling bibliographic options:

Do nothing	Nothing will happen to the record, and only the portfolio will be deleted. If the portfolio was the record's only inventory, this will create an orphaned record in the system.
Delete bibliographic record(s)	This option will delete the record along with the portfolio. If other inventory was attached to the record those portfolios will no longer be attached to a record.
Suppress bibliographic record(s)	When the portfolio is deleted the record will be suppressed. If the other active inventory is attached to the record, the record will be suppressed for patrons to find in Primo.

4. d

Single Record

1. Open the record in the Metadata Editor (MDE).

a. From title

i. Click on title.

1 Los rubios = The blonds / Barry Ellsworth presenta ; una película de Albertina Carri ; productor, Barry Ellsworth. Edit Record Order ...

Visual material By Carri, Albertina, (New York, N.Y.) : Women Make Movies, 2003

Language: Spanish

Record number: (OCoLC)1149479284

MMS ID: 991014828762605612

Subject: Carri, Albertina.--1973--Family. Disappeared persons--Argentina. Children of disappeared persons--Argentina. and others

Modification Date: -

Creation Date: -

Electronic (1) Other details

b. From portfolio

i. Click title

1 Los rubios = The blonds / Barry Ellsworth presenta ; una película de Albertina Carri ; productor, Barry Ellsworth. Resource sharing request Edit Portfolio ...

Kanopy Streaming Videos (Kanopy Streaming Service): Full Text

Access Type: Current

Electronic Material Type: Streaming Video

Creation Date: 07/30/2024 10:00:31 EDT

Modification Date: 07/30/2024 10:00:32 EDT

ii. Click Edit in the right-hand corner

Record View Add Holdings Push to MDE Back Edit

Los rubios = The blonds / Barry Ellsworth presenta ; una película de Albertina Carri ; produ...

MARC BIBFRAME

LDR 04440cgm a2200901 | 4500

001 991014828762605612

005 20240730100047.0

c. Push Selected to MDE

i. Select need record in the box beside to the left of the title. Then select **Push Select to MDE** then go to the **Show MDE**.

All Titles (1 - 1 of 1) 991014828762605612 Push Selected to MDE Save and Filter Query

Institution Network Community

Select All Sort by: Rank Secondary Sort by: Rank 1 rows selected Expand

1 Los rubios = The blonds / Barry Ellsworth presenta ; una película de Albertina Carri ; productor, Barry Ellsworth. Edit Record Portfolio List ...

Visual material (Projected medium - Electronic) two-dimensional moving image; computer; online resource By Carri, Albertina, (New York, N.Y.) : Women Make Movies, [2003]

Language: Spanish

Creation Date: 07/30/2024 09:56:53 EDT

Record number: (OCoLC)1149479284

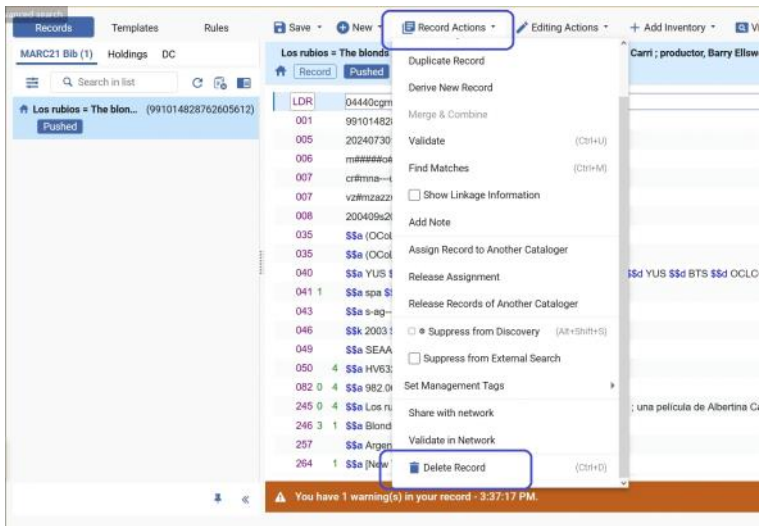
MMS ID: 991014828762605612

Modification Date: 07/31/2024 04:06:02 EDT

Physical Electronic (1) Digital Other details

Show MDE Configuration

2. When you are in the MDE make sure the record is open on the right of the screen. Select **Record Action** to bring down the drop-down menu, scroll to the bottom and hit **Delete Record**.



Batch Portfolios

Using Jobs

1. Create a set of the portfolios that you'd like to delete
2. On the left side, go to **Admin**, and under **Manage Jobs and Sets**, go to **Run a job**.
3. On the Run a **Job - Select Job to Run** page and search for the job named "Delete Electronic portfolios" click on the job and hit **Next** at the top left corner.

Run a Job - Select Job to Run 1 ? Cancel Next

1 - 1 of 1

Type: All Source type: All Content type: All

Name	Description	Content Type	Type
1 <input type="radio"/> Delete Electronic portfolios	Delete a set of Electronic portfolios	Portfolio	Withdraw

4. Pick the set you saved to delete in the list and hit Next.

Run a Job - Select Set 1 2 3 4 Cancel Back Next

1 - 20 of 428

Content Type: All

Name	Type	Content Type	Content Origin	Create Date
1 <input checked="" type="radio"/> Portfolio Deletes_Jobs	Logical	Electronic portfolios	Institution only	11/18/2024 14:38:33 EST
2 <input type="radio"/> Swank Load Portfolios_2024-10-30	Logical	Electronic portfolios	Institution only	10/30/2024 09:49:17 EDT
3 <input type="radio"/> Swank Load_2024-10-30	Logical	Electronic titles	Institution only	10/30/2024 09:22:45 EDT

5. In the "Task Parameters: Delete portfolios" under "Delete Policy" choose the option you need for each policy and then hit next.

a. Portfolio is linked to an active PO-line

Delete portfolio	Delete the portfolio even if it is linked to a PO-line.
Skip	Skip any portfolios linked to a PO-line.

b. Portfolio is linked to an active e-Activation task

Delete portfolio	Delete the portfolio even if it is linked to a e-Activation task.
Skip	Skip any portfolios linked to an e-Activation task.

c. Handling bibliographic records without inventory

Do nothing	This will only delete the portfolio leaving the record alone. <ul style="list-style-type: none"> In most cases this will create an orphaned record.
Delete bibliographic record(s)	This will delete the bibliographic record along with the portfolio.
Suppress bibliographic record(s)	This will only suppress the bibliographic record while deleting the portfolio. <ul style="list-style-type: none"> In most cases, this will create an orphaned record that is searchable in Primo.

6. At the "Run a Job - Review and Confirm" page, you will see boxes with information on the job you just put in and its API information. At the Schedule box you will be given frequency options on when or how many times you will run the job. After picking a frequency, go to the top left corner and select submit.

7. After hitting a submit a "Confirmation Message" window will appear to make sure you want to run the job. If you are sure hit confirm.

8. After hitting confirm the you will be taken to the "Monitor Jobs" page where you can watch the progress. When it is done the job will go under the "History" tab where you can view a report by clicking the link under the ellipses. Alma will also send you a report.

Scheduled Scheduled Manual Jobs Running History

1 - 1 of 1 Job ID

Refresh

Job Category : All

a.

Name	Job Category	Creator	Submit Date	Start Date	Progress	Status	Records processed	Records with exceptions
Delete Electronic portfolios 1 - Portfolio Deletes_Jobs - 11/18/2024 15:05:33 EST	Repository	test_c...	11/18/2024 15:19:03 EST	-	N/A	Pending	-	-

Job Category : All Status : All Submit Date Range 11/17/2024 - 11/18/2024

b.

Name	Process ID	Records processed	Records with exceptions	Job Category	Operator	Submit Date	Start Date	End Date	Status
Delete Electronic portfolios - Portfolio Deletes_Jobs - 11/18/2024 15:05:33 EST	8700...	22	0	Repos...	test_c...	11/18/2... 15:19:03 EST	11/18/2... 15:19:10 EST	11/18/2... 15:20:39 EST	Completed

9. If everything deleted correctly you can go back and delete the set you saved.

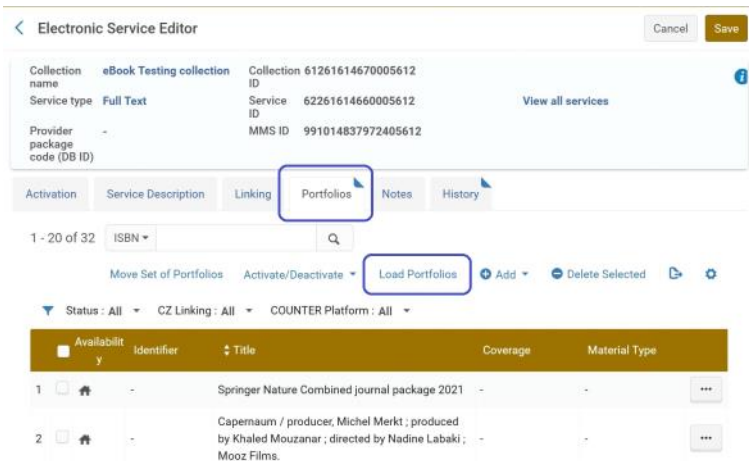
Within Collections (Using the Activation Wizard)

- Create an Excel Spreadsheet that can be read by the Activation Wizard in Alma.
 - Can use directions from ExLibris's "Portfolio Loader" directions or the library's shared directions at _____.
 - You can also use a KBART file that is readable by the Activation Wizard.
- Do an Electronic Collection search for the collection that has the portfolios you want to delete.
- Go to the ellipses on the right side at the collection and click on **Edit Service**.

a.

The screenshot shows the Alma interface for an 'eBook Testing collection'. On the left, details include: Type: Selective package, Collection ID: 61261614670005612, Services: Full Text (Available), MMS ID: 991014837972405612, Creation Date: 11/19/2024 13:49:19 EST, and Modification Date: 11/19/2024 13:53:01 EST. On the right, a dropdown menu is open, listing actions such as 'Descriptive Record', 'Delete', 'View', 'Order', 'Link to community', 'Create E-Activation Task', 'Publishing information', and 'Edit Service' (which is circled in blue).

4. On the "Electronic Service Editor" page go to the **Portfolios Tab** and just below it click on **Load Portfolios**.

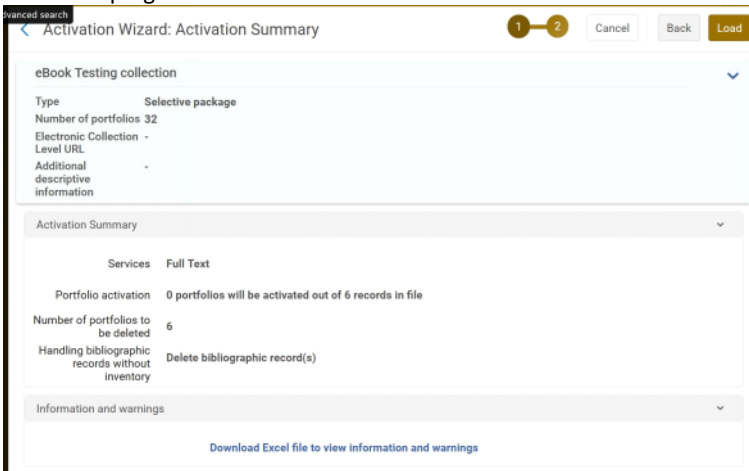


a.

5. This will open up the "Activation Wizard: File Upload" put in the settings below in each box and then hit Next.

Bibliographic	Select catalog: Institution
Select File	<ul style="list-style-type: none"> Format: Portfolio Loader Format (Excel) <ul style="list-style-type: none"> Use KBART if that is what you have File: Upload the file in the box
Select Loading Policy	Loading Policy Type: Incremental
Select Action	<ul style="list-style-type: none"> Choose Operation: Delete Handling bibliographic records without inventory: (Choose what you need to have done to the bibliographic)
Select Validation Policy	Validate online

6. You will be led to the "Activation: Activation Summary" check to see if the types of deletes you intended will happen then press the **Load** button at the top right.



a.

7. A Job will be ran to delete the records and you will receive a email when its done or you can go to **Admin** then under **Manage Jobs and Sets to watch progress**.

8. When the job is done go back into the collection to see if the portfolios have been deleted.

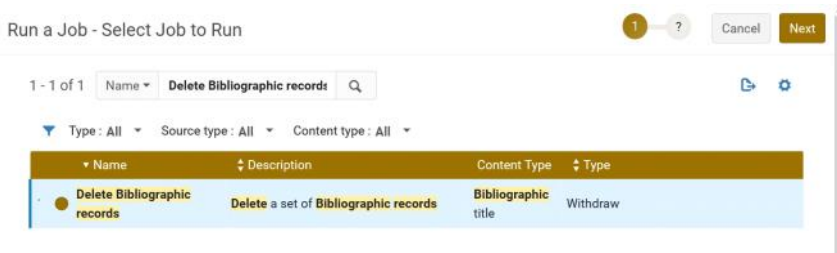
[Using Profiles](#)

Use directions on the Ex Libris site "Managing Import Profiles" under "Available Actions on the Import Profile"

[Batch Records](#)

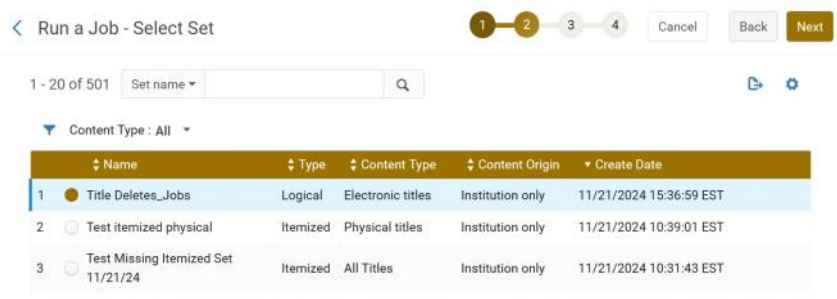
[Using Jobs](#)

1. Create a set of the titles that you'd like to delete
2. On the left side, go to **Admin**, and under **Manage Jobs and Sets**, go to **Run a job**.
3. On the "Run a Job - Select Job to Run" page and search for the job named "Delete Bibliographic records" click on the job and hit Next at the top left corner.



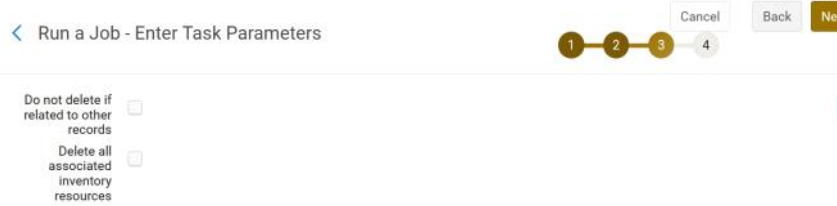
a.

4. Pick the set you saved to delete in the list and hit **Next**.



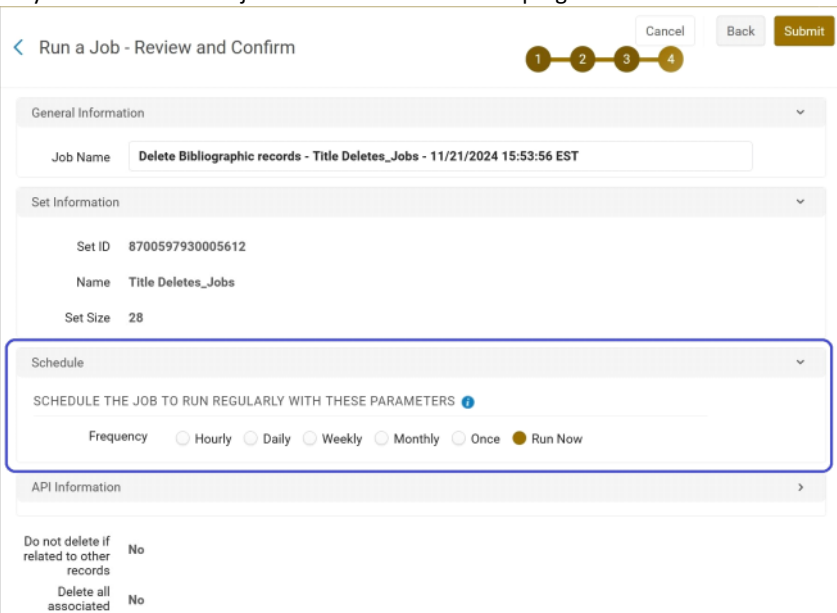
a.

5. On the "Run a Job - Enter Task Parameters" if you need to skip over any of the records that meet these parameters check here, but if you know the records all need to be delete go ahead and click **Next**.



a.

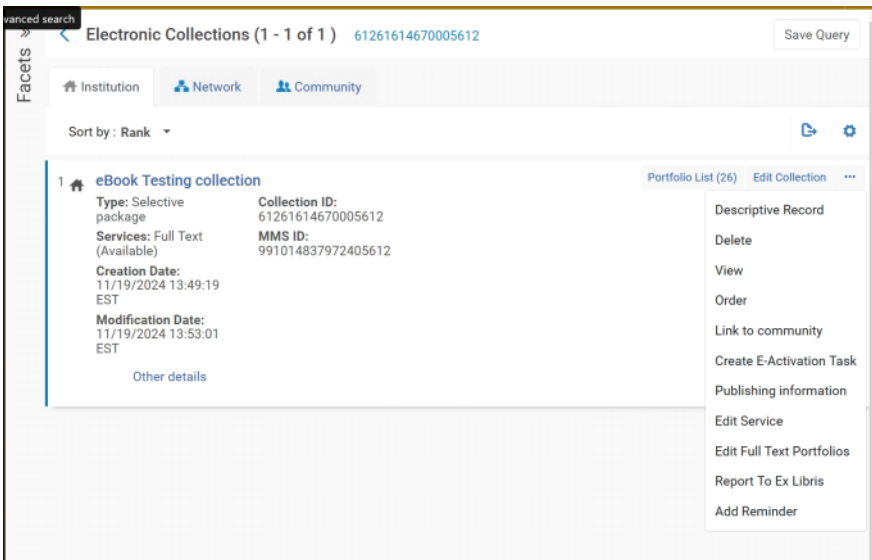
6. On the "Run a Job - Review and Confirm" page, check to make sure you are deleting the correct records. Under **Schedule** click the parameters of when you want to run the job and hit **Submit** in the top right corner.



a.

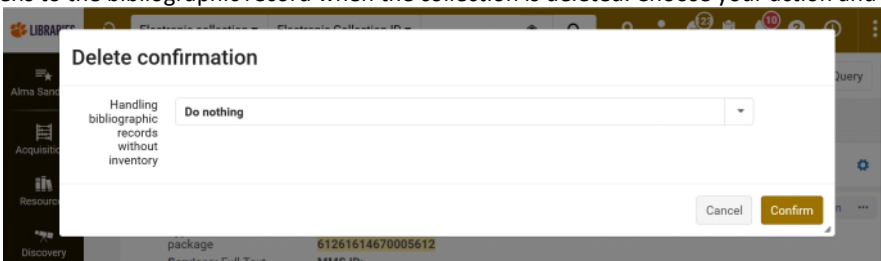
7. After hitting a submit a "Confirmation Message" window will appear to make sure you want to run the job. If you are sure hit confirm.

8. After hitting confirm the you will be taken to the "Monitor Jobs" page where you can watch the progress. When it is done the job will go under the "History" tab where you can view a report by clicking the link under the ellipses. Alma will also send you a report.



a.

- After hitting delete a "Delete confirmation" box will pop up and at "Handling bibliographic records without inventory" you can choose what happens to the bibliographic record when the collection is deleted. Choose your action and hit **Confirm**.



a.

Digital

Digital representation

From Alma Knowledge Assistant: [To delete a digital representation in Alma, follow these steps:](#)

- Open the Digital Representation Resource Editor by searching the repository for a digital title.
- Select the representation you want to delete from the list of representations.
- From the row actions list for the representation, select "Delete Selected" to delete the representation

Collection

From Ex Libris "[Managing Collections](#)" > "Deleting Collections"

To delete a collection:

- You cannot delete a collection if it has any associated titles. To delete the collection, first remove any associated titles.
- Select Delete from the row actions list and select Confirm in the confirmation dialog box.
- To delete multiple sub-collections at once, on the Sub-collections tab select the check boxes next to one or more collections, select Delete Selected, and select Confirm in the confirmation dialog box. If you select any collections that cannot be deleted, a warning appears in the confirmation dialog box. Confirming deletes only the permitted collections; the other collections remain untouched.