

Deleting holdings In OCLC

While PINES staff will routinely batch updating (also known as setting or adding) holdings in OCLC's WorldCat, deleting holdings remains the responsibility of individual library systems. Deleting holdings assists interlibrary loan staff so that they do not get ILL requests for titles no longer held by a system. It is also part of GOLD compliance. It can, unfortunately, be a time consuming process.

With the exception of the Middle Georgia Regional Library System (which has one for the system and one for the Genealogy department), all PINES libraries have one OCLC symbol. This means all holdings, regardless of the number of branches in a system, are held under that one symbol on a bibliographic record in OCLC's WorldCat. Individual copies are also not indicated in WorldCat – it doesn't matter if a library has one or 100 copies of a title. You only need to delete holdings on the corresponding record in OCLC if you have deleted your system's last copy attached to a bibliographic/title record in the PINES database. If just one copy is retained by your system, take no action in OCLC.

Determining last copy

You may already have a procedure in place identifying last copies that works perfectly fine with your workflow. The ideas here are not prescriptive and are intended to be just suggestions. They may not work for you or they may be a better option than what you are doing now.

If you are deleting a few items, determining last copy is simple – you can delete from holdings maintenance and tell from there if any other copies are attached to your library system. If deleting older titles and your library is one of those with multiple records from prePINES databases, you may need to do a quick title search in PINES to be certain.

Once you have established a list of title records with your library's holdings no longer attached, you can then move to OCLC's Connexion Client to delete holdings in OCLC. See section: [Deleting holdings in Connexion Client for further information](#).

Using Item Status (F5)

You can delete barcodes in Item Status and determine after deletion if the item was the last copy.

1. Set your default view to Holdings View.
2. Load barcodes into Item Status (F5). There are three ways to load items into Item Status:
 - Directly entering barcodes
 - Uploading a txt file of barcodes
 - Transferring items from a copy bucket to Item Status
3. Once your items are in Item Status, working in batches of 20 or less, delete the items and then pick Show in Catalog from the Actions menu.

4. Go to each tab and check in Holdings View for your library's holdings. If there are additional copies in your system, no further action is needed. If there are no additional items attached to your system, you will need to build a file or list to assist in OCLC deletions. Again, you have several options:

- You can add all records with no library holdings to a record bucket. This includes records automatically deleted if you deleted the last copy attached to the bibliographic record. See instructions in the section Creating files for Connexion Client Batch Processing to proceed from the buckets.
- You can copy the TCNs (Title Control Numbers) for OCLC records (those with the TCN prefix ocm or ocn) to a txt or NotePad file. See section for batchprocessing files in the section **Deleting Holdings in Connexion**.

5. Then add records that are not OCLC records to a record bucket. See instructions for deleting holdings from records with no OCLC based TCN.

Using MExcel spreadsheets with Pivot Tables

1. Assign all items to be deleted the status Discard/Weed.

- Using copy buckets, put all items to be deleted in a Copy Bucket or buckets, depending on numbers (you can transfer the barcodes from Item Status (F5) into a copy bucket). Use Batch: Edit Item attributes to change status to Discard/Weed. If branch staff add items to be deleted to a Copy Bucket, they can share the bucket with you by giving you the bucket ID number.

2. Run report using the template Last copies, with count ID (clone) found in shared folder: elainehardy → OCLC holdings maintenance reports as well as in the PINES Quick Reports interface → Items → OCLC Holdings Maintenance: Last Copies.

3. Open the report in MExcel.

Inserting a PivotTable in MExcel

1. Delete any row that has a blank barcode, library, or status. (If you sort by barcode, library, then status, it will clump all the blanks together. Then sort by column A [Title Proper or Title] when done.)

2. Highlight the data table (Ctrl + A). Then Insert → PivotTable.

- When Create PivotTable pops up, click OK.

3. From the PivotTable Field List, click and drag:

- TCN value → Row Labels
- Name or Copy Status → Column Labels
- Copy ID or Count → Values

Field list labels will depend on whether you ran the report in the traditional reports interface or in Quick

Reports.

4. Put your cursor anywhere in the data table, then use Ctrl + A to highlight all and Copy.
 - Open a new sheet tab and Paste Values.
5. Delete any empty initial rows and the row Sum of Copy ID or Count, then Sort → Discard/Weed: Smallest → Largest → Add level → Grand Total → Smallest to Largest.
6. Delete any rows that contain other statuses besides Discard/Weed (Unless you want to also use this report to investigate other statuses such as lost or missing).
 - The remaining rows should have Discard/weed = 1, Grand Total = 1. These are the records with the last copy for your system.
7. For OCLC based title control numbers, follow directions for creating a file to batch delete holdings in the Connexion Client.
8. For non-OCLC based title control numbers, before you delete the items you will need to look at the records to get sufficient information to locate a possible record in OCLC.

Delete discard/weed items in PINES.

After you have collected the information you need to delete holdings in OCLC, you can return to your Discard/weed copy buckets and delete the items there or transfer them to Item Status to delete.

Creating files for Connexion Client Batch Processing

You can create text files of OCLC title control numbers or ISBNs to import into the Connexion Client for batch processing. Files of OCLC title control numbers can be easily processed for holdings deletion. Processing a file of ISBNs (for those records without OCLC based TCNs) requires more steps.

OCLC based title control numbers: ocm/ocn/on title control numbers

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