



POLARIS CATALOGING

Retaining Deleted Bib and Item Records

Should deleted Bib and Item records be retained?

This article discusses the benefits of retaining deleted records and gives examples to help the library make an informed choice.

What are the major reasons to retain deleted records?

- The main reason to retain deleted records is for statistics. Even though the records have a status of deleted, stats can still be gathered on information such as Material Type, Collection, etc.
- Retaining deleted records also allows the ability to “undelete” in a mistake is made.

What to remember about deleted record status?

- Records with a deleted status are not ‘real’ records in the sense that they are not fully indexed in the database and can only be found by control number, but this state still allows statistics to be gathered.

What about SQL Transaction tables?

- Many statistics are gathered in the transaction tables and these stats never go away. If the site has a savvy SQL person, that person can still gather many stats after the bibs and items have been deleted and gone through the final purge and are completely gone from the database.

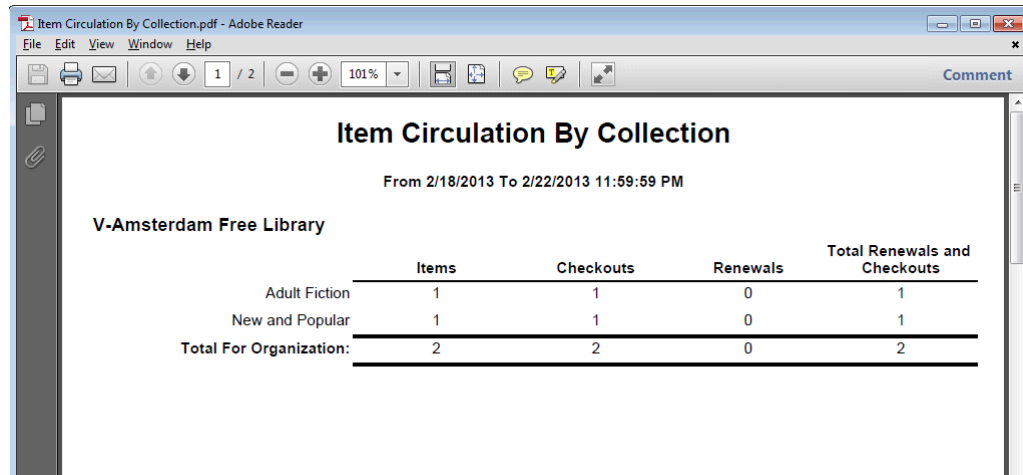
Simplified Workflow:

Libraries mark items with the circulation status Withdrawn over a period of time
The withdrawn items are put into an item record set and a mass delete is done which changes the record status to Deleted
Statistics can be gathered with the canned reports or Simply Reports
A final purge (or double delete) is done to completely remove the records from the database
All statistics are gone with the caveat of what is always retained in the transaction tables

Training

An Example of what the canned report looks like when records have been permanently deleted.

- Item Circulation by Collection – the stats stay after permanent deletion because the underlying query in the report is running against the transaction database.



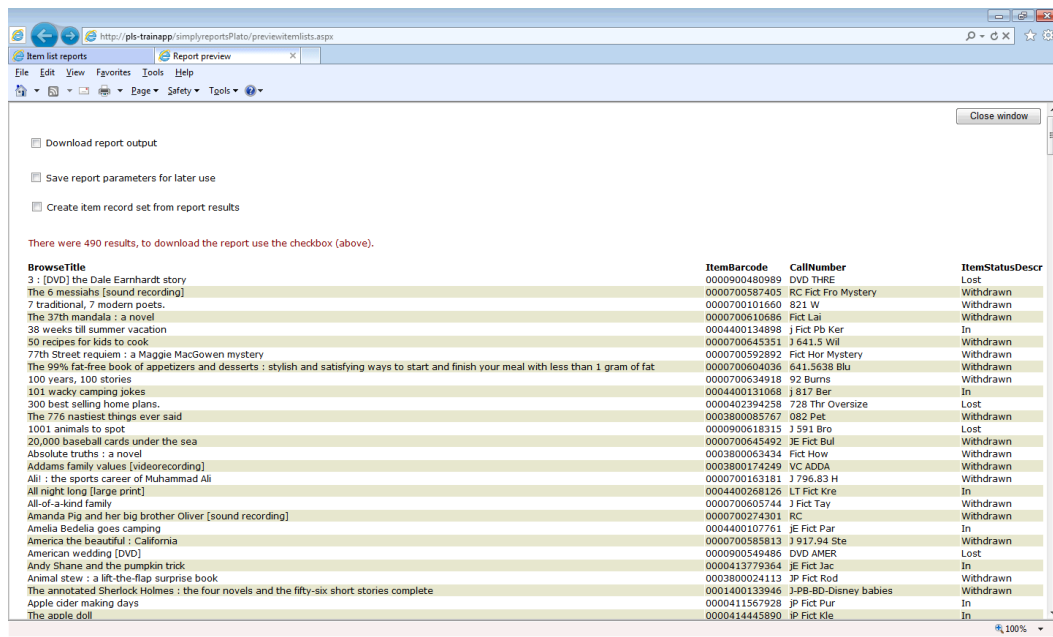
Item Circulation By Collection
From 2/18/2013 To 2/22/2013 11:59:59 PM

V-Amsterdam Free Library

	Items	Checkouts	Renewals	Total Renewals and Checkouts
Adult Fiction	1	1	0	1
New and Popular	1	1	0	1
Total For Organization:	2	2	0	2

An Example of report on deleted item records in Simply Reports

- In the client, a record set of deleted status items was created.
- The following is a result of a query run against the item record set. This type of listing is completely gone after the final purge/deletion has taken place.



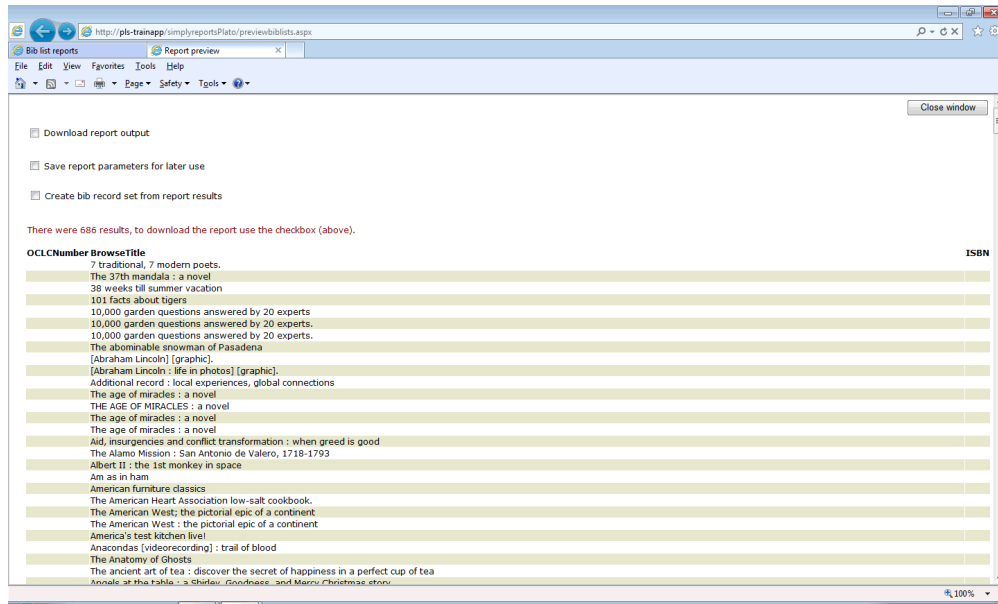
There were 490 results, to download the report use the checkbox (above).

BrowseTitle	ItemBarcode	CallNumber	ItemStatusDescr
3 : [DVD] the Dale Earnhardt story	0000900480989	DVD THRE	Lost
The 6 messiahs [sound recording]	0000700587405	RC Fict Fro Mystery	Withdrawn
7 traditional, 7 modern poets.	0000700101660	821 W	Withdrawn
The 37th mandala : a novel	0000700610686	Fict Lai	Withdrawn
38 weeks till summer vacation	0004400134898	J Fict Pb Ker	In
80 recipes for kids to cook	0000700643351	J 641.5 WII	Withdrawn
77th Street requiem : a Maggie MacGowen mystery	0000700592892	Fict Hor Mystery	Withdrawn
The 99% fat-free book of appetizers and desserts : stylish and satisfying ways to start and finish your meal with less than 1 gram of fat	0000700604036	641.5638 Blu	Withdrawn
100 years, 100 stories	0000700534918	92 Burns	Withdrawn
101 wacky camping jokes	0004400131068	J 817 Ber	In
300 best selling home plans.	0000402394258	728 Thr Oversize	Lost
The 776 nastiest things ever said	0003800085767	082 Pet	Withdrawn
1001 animals to spot	0000900618315	J 591 Bro	Lost
20,000 baseball cards under the sea	0000700645492	JF Fict Bul	Withdrawn
Absolute truths : a novel	0003800065434	Fict How	Withdrawn
Addams family values [videorecording]	0003800174249	VC ADDA	Withdrawn
Ali : the sports career of Muhammad Ali	0000700163181	J 796.83 H	Withdrawn
All night long [large print]	0004400268126	LT Fict Kre	In
All-of-a-kind family	0000700605744	J Fict Tay	Withdrawn
Amanda Pig and her big brother Oliver [sound recording]	0000700274301	RC	Withdrawn
Amelia Bedelia goes camping	0004400107761	JF Fict Par	In
America the beautiful : California	0000700585813	J 917.94 Ste	Withdrawn
American wedding [DVD]	0000900549486	DVD AMER	Lost
Andy Shane and the pumpkin trick	0000413779364	JF Fict Jac	In
Animal stew : a lift-the-flap surprise book	0003800024113	JP Fict Rod	Withdrawn
The annotated Sherlock Holmes : the four novels and the fifty-six short stories complete	0001400133946	J-PB-8D-Disney babies	Withdrawn
Apple cider making days	0000411567928	JP Fict Pur	In
The apple doll	0000414445890	JP Fict Kle	In

Training

An Example of report on deleted bib records in Simply Reports

- Only certain tags/fields can be queried, it is not possible to get all the information from a bib record with a deleted status.
- For example, the OCLC number cannot be queried, so it is important to run holdings reports before the records have been deleted, even if retaining.



Q & A Section

- **Question:** If retain deleted records is set to Yes will the records be visible during searches?
Answer: If you choose to retain deleted records, the deleted records (bibliographic and item) will not be retrieved in any PAC searches.

The deleted records can be found in the staff client. However, records will only be searchable in the client by control number. The deleted records cannot be found by other search fields (title, author, barcode, call number, etc.). Deleted item records are still visible/returned when linking from the bibliographic record in the staff client.

- **Question:** What happens to item, bibliographic, and authority records when they are deleted?
Answer: This all depends on these three settings under Cataloging Profiles: Retain deleted authority records, Retain deleted bibliographic records, and Retain deleted item records.

Training

Setting any of these options to “No” will cause any records of that type to be permanently deleted from the database once you click “Delete”. Once deleted, these records are removed instantly from the system and cannot be retrieved.

- However, should your library have any of these options set to “Yes”, when you click delete, the record is retained and updated to a “Deleted” status. This option enables the user to review any records marked for deletion prior to purging them from the system to ensure that they should in fact be deleted. If they decide that the record needs to be kept, they can select to “Undelete” and place the record back into a “Final” status.
- Once the user has decided the records should in fact be deleted, they have a number of options to remove them from the system. The first option is to open each record individually and click “Delete” for a second time. A second option would be to place the records set to be deleted into a record set, select all of the records, and click delete. The last option would be to purge the records by a defined set of criteria.
- The user can purge cataloging records by navigating to Utilities --> Cataloging Processing --> Purge Cataloging Records. This will open the “Purge Criteria List” which lists existing purge records that list the criteria used to decide which records are to be permanently removed. From here the user can either select an existing purge record or create a new one (Please see the “Purge Cataloging Records” Polaris help file for more detail). Once the record has been defined and scheduled, the purge will take place on the scheduled date and purge any record with a status of “Deleted” as defined in the purge record.

For information on this topic:

Please refer to the following Polaris help files:

- Delete authority records
- Delete bibliographic or item records
- Purge cataloging records (can even link to the setting up purge I did)
- Purge Record Work-form
- Restore (undelete) a deleted cataloging record
- Retain deleted records.

This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system.

Training

© 2022, Innovative Interfaces, Inc.