

## Chapter 10 -- Transferring Volumes and Items

Transferring allows you to move holdings from one record or branch to another, for instance when items have been miscataloged, when they have been attached to the wrong record during migration, or when you have items that will be transferred permanently to a different branch of your library. Transferring volumes means transferring a call number and all items attached to the call number simultaneously. Transferring items means transferring specific items (barcodes) to a different call number.

### *Transferring Volumes from One Record or Branch to Another*

To transfer volumes from one record to another, you first will mark the volume transfer destination, the record or branch where you want the volumes to go.

When you transfer volumes, you are selecting a call number and transferring that call number, plus any and all the items attached to the call number, to a new bibliographic record or library branch.

To do this, bring up the record where the volumes belong in the catalog. You will need to be in the Holdings Maintenance display. Go to **Actions for this Record (Alt + A)**, and choose **Holdings Maintenance (Alt + H)**.

The screenshot shows the Evergreen Indiana cataloging interface. The browser address bar displays '1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us'. The interface includes a navigation bar with 'File', 'Edit', 'Search', 'Circulation', and 'Cataloging' menus. Below the navigation bar, there are tabs for '1 Bib Record: 5212423', '2 Catalog', and '3 Bib Record: ocm55981274'. The main content area is titled 'Record Summary' and displays the following information:

- Title:** Twilight
- Author:** Meyer, Stephanie
- TCN: (System):** 5212423
- Created By: (EG-IN):** 1010101010101
- Edition:**
- Last Edited By: (EG-IN):** 1010101010101
- Pub Date:** 2005
- Last Edited On:** 10/05/08

Navigation buttons include 'Record 3 of 90', 'Start', 'Previous', 'Next', 'End', 'Go Back', and 'Go Forward'. A search bar contains 'title:twilight' and a 'Go!' button. The 'Hussey-Mayfield Memorial Branch' section shows 'Result 3 of 90' and a 'Place Hold' button. The record summary table is as follows:

Title	Twilight
Author	Meyer, Stephanie
ISBN	0316015849
Edition	
Publication Date	2005
Publisher	Little, Brown and Co.
Physical Description	print 498 p. : ill ; 21 cm.
Format	text
Abstract	When seventeen-year-old Bella leaves Phoenix to live with her father in Forks, Washington, she meets an exquisitely handsome boy at school for whom she feels an overwhelming attraction and who she comes to realize is not wholly human.

Buttons for 'Copy Summary', 'Shelf Browser', and 'MARC Record' are visible. A 'View copy information for all libraries' section shows a table with columns: Library, Callnumber, Actions, Available, Checked out, In process, In transit, Resheling, On holds shelf, On order. An 'Actions for this Record' menu is open, showing options: OPAC View, MARC View, MARC Edit, **Holdings Maintenance**, View Holdg, Add to Bucket, Mark for Overlay, Delete Record, Unglelete Record, Duplicate in New Tab, Remove this Frame, Set bottom interface as Default, and Reset Display.

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The Holdings Maintenance display will show the copies at your library for this record. If you have no copies, <0> will display under copies. If you have copies, but they are not displayed, you may need to click the box next to the branch name.

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. The browser's address bar shows the current record ID: `1 Bib Record: 5212423`. The page title is "Cataloging".

**Record Summary**

**Title:** Twilight [\(View MARC\)](#)  
**Author:** Meyer, Stephanie  
**TCN:** (System) [5212423](#) **Created By:** (EG-IN) [101010101010101](#) **Edition:** **Pub Date:** 2005  
**Last Edited By:** (EG-IN) [101010101010101](#) **Last Edited On:** 10/05/08

Record 3 of 90     [Actions for this Record](#)

**Holdings Maintenance**

PLFDP Plainfield Branch Consortial Total: 3 Available: 1

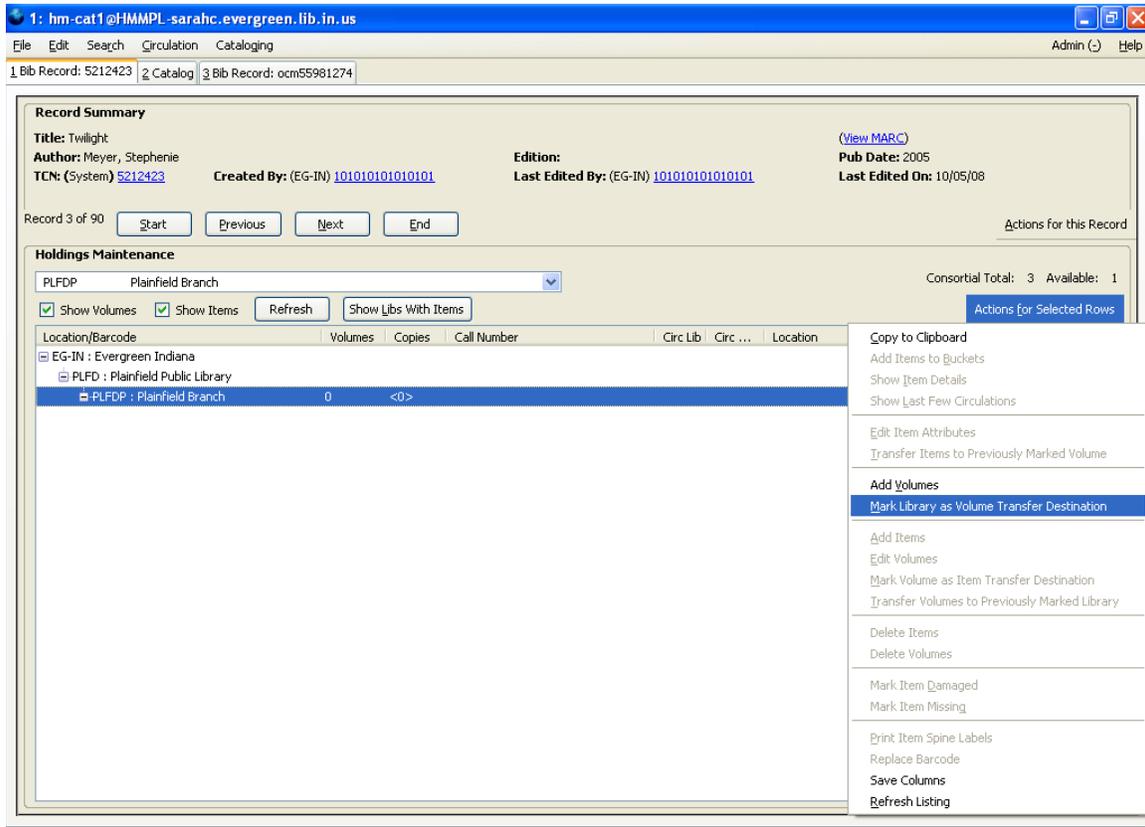
Show Volumes  Show Items   [Actions for Selected Rows](#)

Location/Barcode	Volumes	Copies	Call Number	Circ Lib	Circ ...	Location	Own...	Price	Status
EG-IN : Evergreen Indiana									
PLFD : Plainfield Public Library									
<input checked="" type="checkbox"/> PLFDP : Plainfield Branch									
		0							<0>

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To transfer volumes to this record or from one branch to another, you will need to highlight the name of the desired branch by clicking on it. Make sure to click on the branch, and not the library. If you have multiple branches, and wish to transfer an item from one branch to another, be sure to select the correct branch. You must have a library branch highlighted for the correct action to be active. If “Mark Volume as Item Destination” is active then you have highlighted a call number instead of a branch name. Under **Actions for Selected Rows (Alt + f)**, you will select **Mark Library as Volume Transfer Destination (Alt + M)**. You can also right click on the branch line to select it from the drop down list.



A dialog box will pop up, informing you that you have marked the Volume Transfer Destination.



Click **OK**, or press **Enter**.

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Then, if you are transferring volumes from one record to another, open a new tab and bring up the record of the volumes you wish to transfer. You will again need to be in the Holdings Maintenance Display.

Click on the call number of the volume(s) you wish to transfer to highlight that line. All the volumes with that Call Number will transfer. If you wish to select multiple call numbers on one record, press the Control key as you click on the call numbers.

Under **Actions for Selected Rows (Alt + f)** select **Transfer Volumes to Previously Marked Library (Alt + T)**, or right click on the Call Number line and select it from the drop down list. If you did not highlight a call number, this will not be an active selection. Do not choose “Transfer Items to Previously Marked Volume.” If this is an active selection, then you have highlighted a barcode instead of a call number.

The screenshot shows the Evergreen Indiana Cataloging Training Manual interface. The browser address bar displays "1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us". The interface includes a menu bar (File, Edit, Search, Circulation, Cataloging) and a toolbar (Admin, Help). The main content area is divided into several sections:

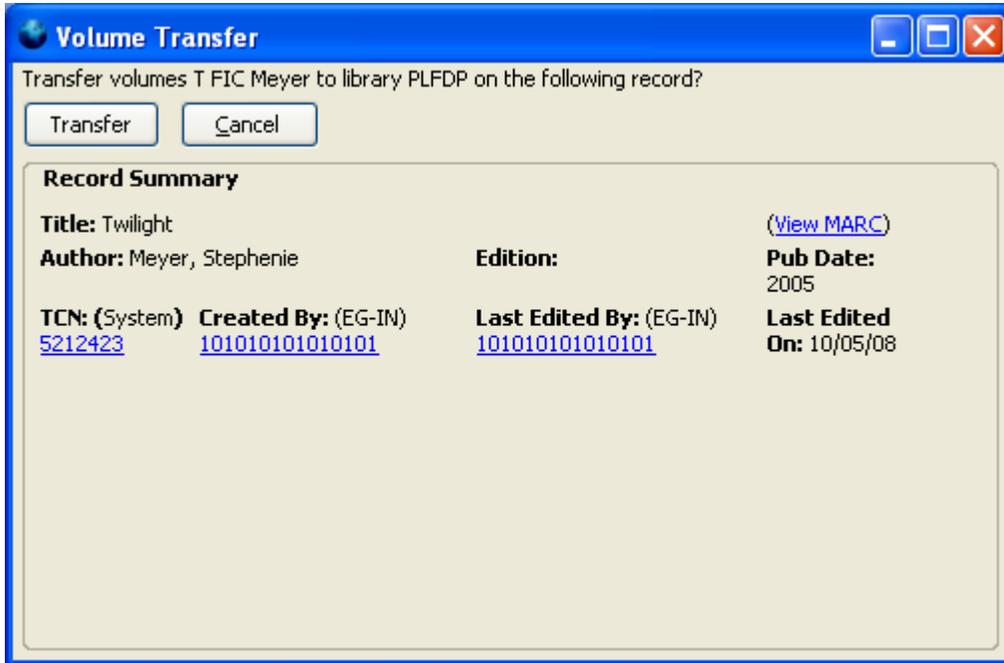
- Record Summary:** Displays metadata for the record, including Title (Twilight : a novel), Author (Mosby, Katherine), Edition (1st ed.), and Pub Date (c2005).
- Holdings Maintenance:** Shows a table of holdings for the selected record. The table has columns for Location/Barcode, Volumes, Copies, Call Number, Circ Lib, Circ ..., and Location. The table is filtered by PLFDP and Plainfield Branch. A dropdown menu is open over the table, showing the "Actions for Selected Rows" menu.
- Actions for Selected Rows:** A context menu with various actions, including "Transfer Volumes to Previously Marked Library" (highlighted).

Location/Barcode	Volumes	Copies	Call Number	Circ Lib	Circ ...	Location
EG-IN : Evergreen Indiana						
PLFD : Plainfield Public Library						
PLFDP : Plainfield Branch	3	<6>				
T FIC Meyer	4		T FIC Meyer			
31208910633777			T FIC Meyer	PLFDP	book	Stacks
31208910767799			T FIC Meyer	PLFDP	book	Stacks
31208910767807			T FIC Meyer	PLFDP	book	Stacks
31208910767815			T FIC Meyer	PLFDP	book	Stacks
T FIC Mey	1		T FIC Mey			
31208910415829			T FIC Mey	PLFDP	book	Stacks
FIC Mos	1		FIC Mos			
31208910168147			FIC Mos	PLFDP	book	fiction

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A window will pop up asking you to verify the transfer. Check it carefully! If you have forgotten to mark the correct record transfer destination, the last location you have marked that day will be used. Check to make sure the information is correct, then click the **Transfer** button. If you have marked the wrong record or branch, or changed your mind, you can click Cancel to abort the transfer. Make sure the blue bar at the top of the box says “Volume Transfer.” If it says “Item Transfer” then you are transferring the item only, not the call number.



A dialog box will pop up, confirming your transfer:



Click **OK**, or press **Enter**.

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Your volumes will disappear from the Holdings Maintenance screen in the current record or branch.

**Record Summary**

**Title:** Twilight : a novel  
**Author:** Mosby, Katherine  
**TCN:** (OCLC) [ocm56807811](#)    **Created By:** (EG-IN) [101010101010101](#)    **Edition:** 1st ed.    **Pub Date:** c2005  
**Last Edited By:** (EG-IN) [101010101010101](#)    **Last Edited On:** 08/24/08

Record 4 of 70    [Start](#)    [Previous](#)    [Next](#)    [End](#)    [Actions for this Record](#)

**Holdings Maintenance**

PLFDP Plainfield Branch    Consortial Total: 24 Available: 16

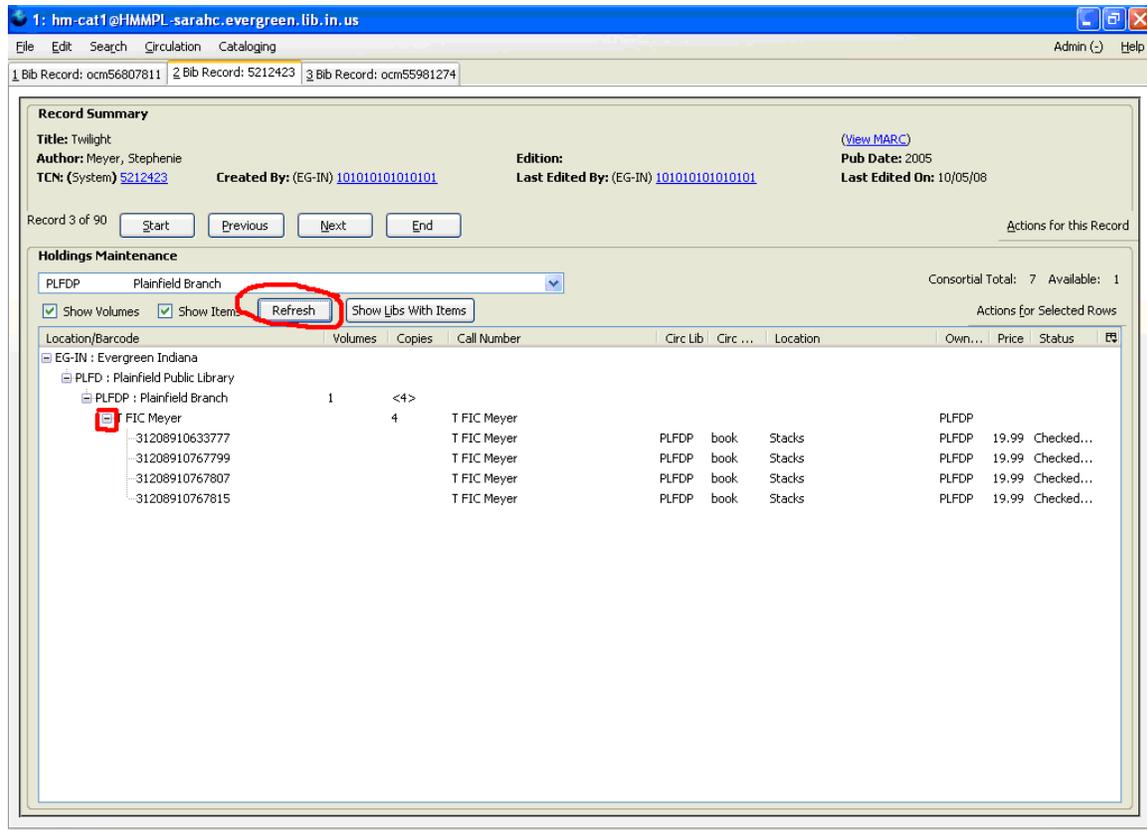
Show Volumes     Show Items    [Refresh](#)    [Show Libs With Items](#)    [Actions for Selected Rows](#)

Location/Barcode	Volumes	Copies	Call Number	Circ Lib	Circ ...	Location	Own...	Price	Status
EG-IN : Evergreen Indiana									
PLFDP : Plainfield Public Library									
PLFDP : Plainfield Branch	2	<2>							
T FIC Mey		1	T FIC Mey				PLFDP		
31208910415829			T FIC Mey	PLFDP	book	Stacks	PLFDP	19.99	Checked...
FIC Mos		1	FIC Mos				PLFDP		
31208910168147			FIC Mos	PLFDP	book	fiction	PLFDP	24.95	Lost

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And reappear under holdings maintenance for the record or branch you marked as the Transfer Destination. You may need to hit Refresh to see them appear, or click the box next to the call number to see your barcodes listed.



### Transferring Items from One Volume to Another

Transferring items is very similar to transferring volumes. You can transfer items from one volume to another within the same record or branch or to other records or branches.

When you transfer items, you are transferring only items (barcodes), not the call number. You would do this when you have multiple items attached to a call number and you don't wish to transfer all of them, or if you are transferring a pre-cat item which does not have a call number.

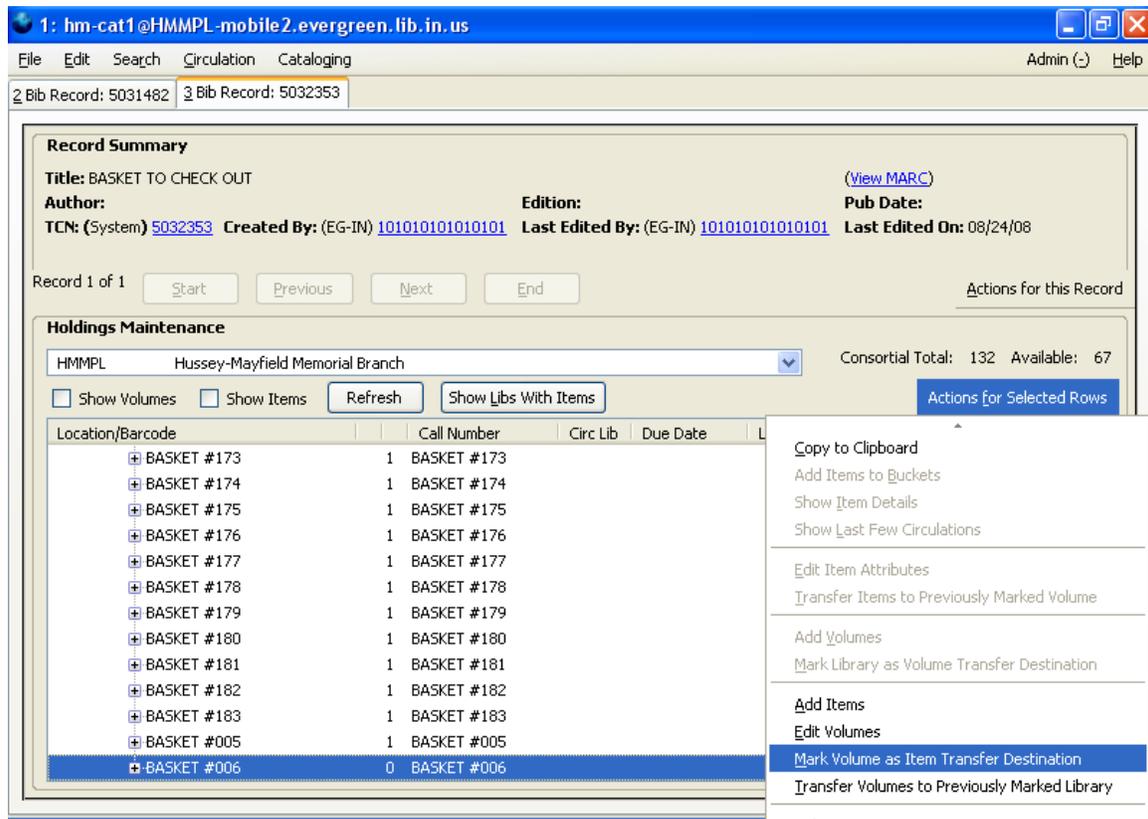
*TIP: Another instance when you would transfer items is if you want to change the call number of an item to a call number that already exists. Since you can't have two identical call numbers attached to the same record, you would transfer the item to the existing call number and delete the old call number.*

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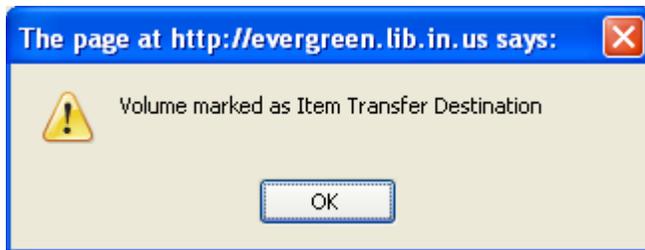
## Chapter 10 – Transferring Volumes and Items

You must have a call number already on the record where you wish to transfer the item. If there is no appropriate call number, you must add it before an item transfer can be done. To add a call number, simply add a volume with 0 copies to the records where you will be transferring the item(s). See **Chapter 5 -- Adding Holdings**, if necessary.

In the Holdings Maintenance view, highlight the volume to which you would like to transfer your item. Then under **Actions for Selected Rows (Alt + F)**, select **Mark Volume as Item Transfer Destination (Alt + M)**. You have to have a call number highlighted, or Mark Volume as Item Transfer Destination will not be an active option. If Mark Library as Volume Transfer Destination is active then you have highlighted a branch instead of a call number.



A dialog box will pop up telling you the volume has been marked:

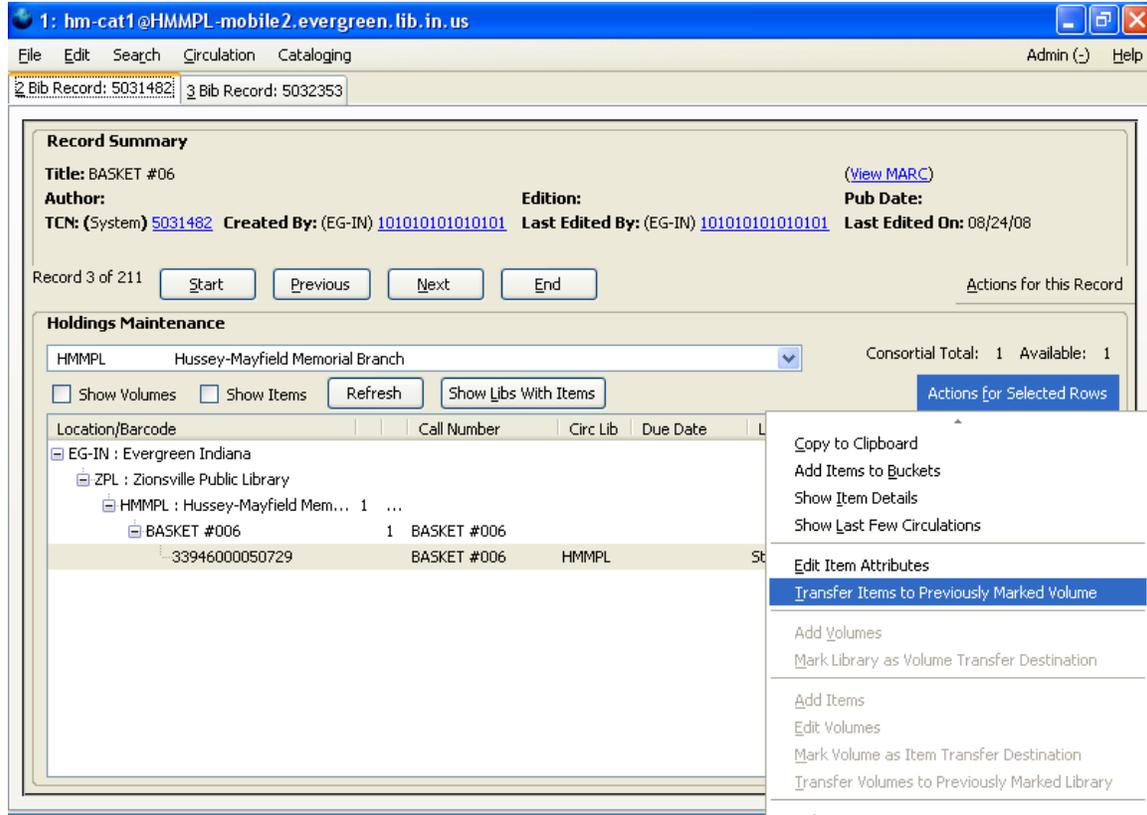


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Click **OK**, or press **Enter**.

Next go to the record with the item you wish to transfer. If you do not have it open, bring it up in a new tab.



Highlight item/barcode that you wish to transfer. Then under **Actions for Selected Rows (Alt + F)** select **Transfer Items to Previously Marked Volume**. You have to have a barcode highlighted or this will not be an active option. If **Transfer Volumes to Previously Marked Library** is active, you have highlighted a call number instead of a barcode.

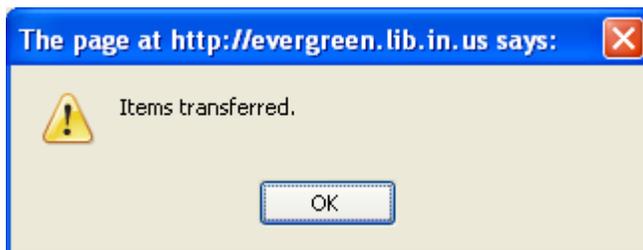
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A window will open up allowing you to verify that the item is being transferred to the correct record and volume. Check it carefully! If you have forgotten to mark the correct item transfer destination, the last volume you have marked that day will be used as your item destination. Note the volume (call number) is listed in the text at the top of the box. Here the volume is “BASKET #006.” Also, make sure the blue bar at the top of the box says “Item Transfer.” If it says “Volume Transfer,” then you are transferring the call number and all volumes attached to it, not just an item or items.



If the volume and record are correct, click the **Transfer** button. Otherwise, click Cancel.



A dialog box will pop up, telling you that the item has been transferred. Click **OK** or press **Enter**.

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You will find that your item/barcode is no longer attached to the original record.

The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us". The browser has a menu bar with "File", "Edit", "Search", "Circulation", and "Cataloging", and a toolbar with "Admin (-)" and "Help". Below the browser window, there are two tabs: "2 Bib Record: 5031482" and "3 Bib Record: 5032353".

The main content area is titled "Record Summary" and contains the following information:

- Title: BASKET #06
- Author:
- TCN: (System) 5031482
- Created By: (EG-IN) 101010101010101
- Edition:
- Last Edited By: (EG-IN) 101010101010101
- Pub Date:
- Last Edited On: 08/24/08

Below the record summary, there are navigation buttons: "Start", "Previous", "Next", and "End". To the right, it says "Record 3 of 211" and "Actions for this Record".

The "Holdings Maintenance" section includes a dropdown menu for "HMMPL" and "Hussey-Mayfield Memorial Branch". It also shows "Consortial Total: 0" and "Available: 0". There are checkboxes for "Show Volumes" and "Show Items", and buttons for "Refresh" and "Show Libs With Items".

Below the "Holdings Maintenance" section is a table with the following columns: "Location/Barcode", "Call Number", "Circ Lib", "Due Date", "Location", "Owning Lib", and "Status". The table contains the following rows:

Location/Barcode	Call Number	Circ Lib	Due Date	Location	Owning Lib	Status
EG-IN : Evergreen Indiana						
ZPL : Zionsville Public Library						
HMMPL : Hussey-Mayfield Mem... 1 ...						
BASKET #006	0 BASKET #006				HMMPL	

If this was the only item attached to the record, the record will be automatically deleted, so if you close the tab, you may not be able to find it again. If there are other items attached to this record, but no other items are attached to your call number, you must delete the call number. See ***Deleting Volume Records from Evergreen***, page 18.3, if needed.

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You can open up the destination record and find your item there. You may need to hit refresh, if you already have the record open in another tab.

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The browser has tabs for 'Bib Record: 5031482' and 'Bib Record: 5032353'. The main content area is titled 'Record Summary' and displays the following information:

- Title:** BASKET TO CHECK OUT [\(View MARC\)](#)
- Author:** **TCN:** (System) [5032353](#) **Created By:** (EG-IN) [101010101010101](#) **Edition:** **Last Edited By:** (EG-IN) [101010101010101](#) **Pub Date:** **Last Edited On:** 08/24/08

Below the summary are navigation buttons: 'Record 1 of 1', 'Start', 'Previous', 'Next', 'End', and 'Actions for this Record'.

The 'Holdings Maintenance' section shows a dropdown menu for 'HMMPL' and 'Hussey-Mayfield Memorial Branch'. It includes a 'Consortial Total: 133 Available: 68' and buttons for 'Show Volumes', 'Show Items', 'Refresh', and 'Show Libs With Items'. A table below lists holdings with columns for Location/Barcode, Call Number, Circ Lib, Due Date, Location, Owning Lib, and Status.

Location/Barcode	Call Number	Circ Lib	Due Date	Location	Owning Lib	Status
+ BASKET #174	1 BASKET #174				HMMPL	
+ BASKET #175	1 BASKET #175				HMMPL	
+ BASKET #176	1 BASKET #176				HMMPL	
+ BASKET #177	1 BASKET #177				HMMPL	
+ BASKET #178	1 BASKET #178				HMMPL	
+ BASKET #179	1 BASKET #179				HMMPL	
+ BASKET #180	1 BASKET #180				HMMPL	
+ BASKET #181	1 BASKET #181				HMMPL	
+ BASKET #182	1 BASKET #182				HMMPL	
+ BASKET #183	1 BASKET #183				HMMPL	
+ BASKET #005	1 BASKET #005				HMMPL	
+ BASKET #006	1 BASKET #006				HMMPL	
33946000050729	BASKET #006	HMMPL		Storage . 2n...	HMMPL	Available