

Transferring volumes and items

Sometimes items or volumes are attached to an incorrect record or items to the wrong volume; but, other items and volumes are correctly on the record, making merging or overlaying inappropriate. In such cases, you should transfer those specific items or volumes to the correct bibliographic record. There are also cases where volumes and items or just items need to be transferred to different volumes or libraries on the same bibliographic record.

When transferring volumes and items, care should be taken to ensure the correct record, library, and volume are selected as transfer destinations. Currently, there is no confirmation message for verification that the correct destination has been marked.

Transferring volumes and attached items

There are a number of occasions where a volume and its items are attached incorrectly to a record: a large print volume can be on a regular print record, a supplement could be on a record for the multipart title, multi volumes could be added to a single volume record, to name just a few. In these instances, you want to retain the bibliographic record with the correct volumes attached and move your incorrectly attached items to a different record. You can easily transfer the erroneously attached volume(s) with item(s) to the correct record.

There are also instances where you need to transfer an item to a different volume on the same bibliographic record or volume and item to a different owning library on the same record. You follow the same essential instructions outlined below, just within the same bibliographic record.

The first step is to identify the correct record, if you do not need to transfer within the record. Follow PINES matching parameters to either find an existing record in PINES or import one from OCLC.

Keep in mind, if the owning library and volume/call number you are transferring are the same as the owning library and volume/call number on the destination record, the item will be added to the destination library's existing volume/call number and not as a new volume/call number. For example, if you are transferring:

Library A GR 973.3 DAR barcodeA

to a destination record with:

Library A GR 973.3 DAR barcodeB

after transfer your holdings will be:

Library A GR 973.3 DAR barcodeA

Library A GR 973.3 DAR barcodeB

If you in reality have **GR 973.3 DAR Vol. 1** and **GR 973.3 DAR Vol.2**, you must edit your call numbers

before the transfer so that the result is:

Library A GR 973.3 DAR Vol.1 barcodeA

Library A GR 973.3 DAR Vol.2 barcodeB

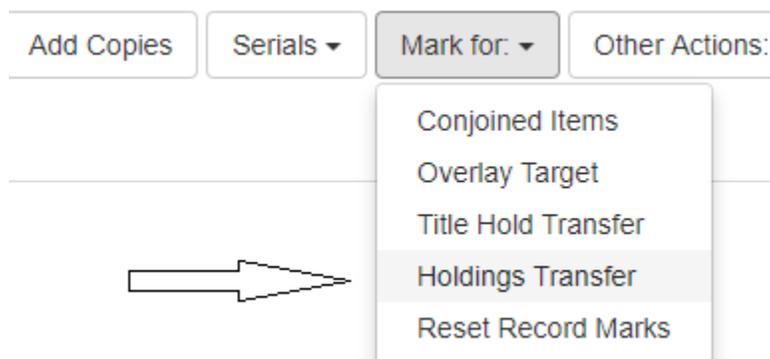
Once you have identified the destination record and made any changes to call numbers so that the volume and item transfer correctly, you have two choices. You can mark the record as the transfer destination or mark the library as the destination.



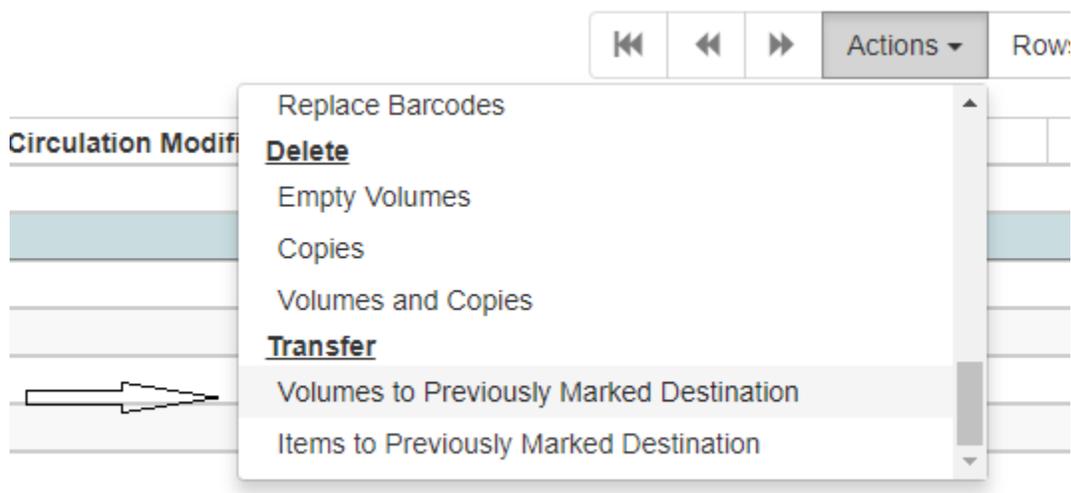
As of January 2018, transfers complete without a confirmation step. Make sure that you have marked the correct record before you transfer.

Marking records for volume transfer

You can mark the record as the transfer destination whether or not holdings for the library are already attached to the record. In either case, Evergreen will transfer the volume and item as desired. Since you are marking the record as the destination of the transfer, you can transfer volumes/items from multiple libraries to those same libraries on that record. Make sure both your destination record and the record with volumes to be transferred are opened in separate tabs. This makes it easier to keep track of what you are doing and to verify the transfer once completed. At the destination record, from any view, use the dropdown menu “Mark for” that is to the right side of the screen, just under the record summary, and chose “Holdings Transfer”. A green box that says “Holdings Transfer Target Set” will briefly appear at the bottom right of the screen. Look at Holdings Transfer in the dropdown menu again and you will see the Record ID number of the destination record in parentheses.



Move back to the record with the volume(s) to be transferred, and in “Holdings View”, check the box beside the volume or volumes you wish to transfer. You can transfer multiple volumes from either the same library or multiple libraries to the destination record. Once you have selected the volumes to be transferred, from the “Actions” menu, select “Transfer” - “Volumes to Previously Marked Destination.”



A green dialog box will display informing you that the volumes have transferred. You can verify by redisplaying the records.

Marking Libraries for volume transfer

You can also mark an individual library as the volume transfer destination. This is useful if you are transferring volumes from one record to another, either to the same or different library, or if you are transferring on the same record between libraries. A volume does not have to exist for the library on the destination record. You can transfer volumes and items from multiple libraries to another, single library using this function. You cannot transfer volumes from multiple libraries to multiple libraries from the action menu since you are marking the library as a transfer location.

At the destination record, in “Holdings View”, choose the destination library from the “Actions” menu – “Mark” – “Library/Volume as Transfer Destination”.

A green dialog box will flash in the lower corner of your screen acknowledging that “Holdings Transfer Target Set”.

Return to the volumes to be transferred. Choose them and then, from “Actions” menu, select “Transfer” – “Volumes to Previously Marked Destination.”

A green dialog box will display informing you that the volumes have transferred. You can verify by redisplaying the records.

Transferring items

Sometimes items can be attached to the wrong record or volume while other items on the same call number/volume are correctly attached, so you want to move just the specific item(s) to another record or volume, leaving the volume and items on the correct record. Processing precats also requires you to transfer the item to a correct record. See PreCats: Adding and Processing Brief Title Records to the PINES

Database for instructions for handing precats. It is also best practice to transfer items on acquisitions records to matching OCLC records during cataloging, or if circulating items are mistakenly attached to them rather than merging or overlaying bibliographic records.

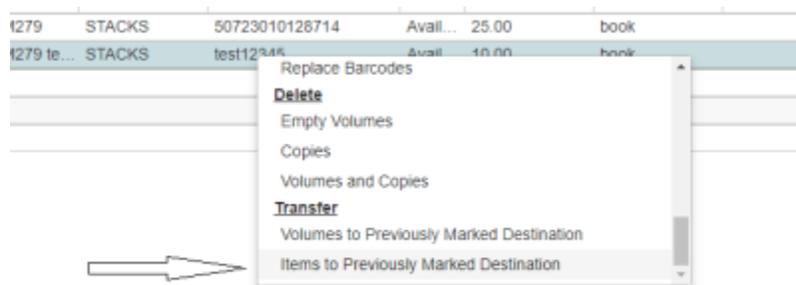
There are also times where you need to transfer an item from one call number/volume to another call number/volume on the same record. This can be for a variety of reasons including because the item is being transferred from one branch library to another, needs to be transferred from reference to an existing circulating call number, or was attached to the wrong volume of a multivolume set.

You can transfer a single or multiple items from one volume to another. Since you are marking a specific volume, the destination for all items must be the same.

When a volume for your library exists on destination record

From “Holdings View” of the destination volume, in the “Actions” menu - “Mark” - “Library/Volume as Transfer Destination”.

Also in “Holdings View”, go to the item to be transferred, either in the same or another bibliographic record. From the “Actions” menu - “Transfer” - “Items to Previously Marked Destination”.



A message will flash at the lower right of the screen confirming that the item transferred. You can verify by redisplaying the records.



Remember that the holdings display in the web client differs from holdings maintenance. The item will not be imbedded under the destination volume but will be a different line with the same call number and library.

When a volume for your library does not exist on destination record

If your library does not have a volume already attached to the destination record, you must first create an empty volume to be the target for the item.

From “Holdings View”, select the destination library. From the “Actions” menu, choose “Add” -

“Volumes”. The volume creator will open. Enter the call number and click on “Save & Exit”.

You will need to redisplay the record to see the volume with no items attached you just created for the library.

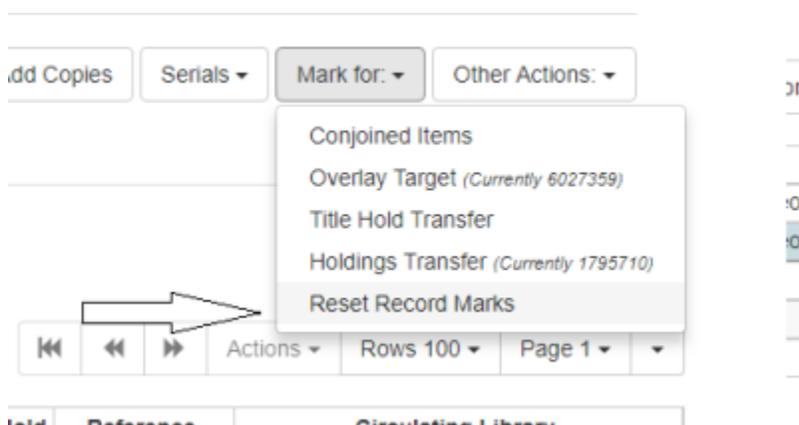
Now mark the volume for transfer from the “Actions” menu - “Mark” - “Library/Volume as Transfer Destination”.

From the item record to be transferred, in “Holdings View” choose — “Actions” menu - “Transfer” - “Item to Previously Marked Destination”.

A confirmation dialog box will flash acknowledging that Item(s) transferred.

Clearing marked records or volumes

You can clear records and volumes marked for transfer from the “Mark for” menu on any bibliographic record.



This clears all marks, including overlay targets and conjoined items.

From:
<https://pines.georgialibraries.org/dokuwiki/> - PINES Documentation

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Last update: 2018/10/11 20:15

