Transferring allows you to move holdings from one record or branch to another. This is useful when items have been attached to the wrong record during migration, when they have been mis-cataloged or mis-merged, 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 that call number* simultaneously to another catalog record or another library.

Transferring **items** means transferring a *single specific item without the call number* to a different call number. It can be a different call number on the same record or a call number on a different record.

**NOTE:** In most cases transfer volumes is used. Transfer items is only used when you have multiple items attached to a call number, and you don’t want to transfer them all.

**TIP:** Any time you want to transfer all the items attached to a call number, (even if that’s only one item) you will Transfer Volumes. Use Transfer Items when there are multiple items attached to a call number and you don’t want to transfer all of them.

**TIP:** When performing transfers it’s very important to highlight the correct line. It may be easier to distinguish between volumes and items and select the correct line if you turn off the Call Number in the Column Picker, as seen below.
Transferring Volumes from One Record to Another

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.

To transfer volumes, in one tab open the record where the volume is currently in the Holdings Maintenance view.

The volume (call number) may have one or more items attached to it.

In another tab, open the record where you want the volume to be.
To transfer a volume to this record, you will need to highlight the name of your library branch by clicking on it, as seen below. Then right click or click on **Actions for Selected Rows (Alt + F)** and select **Mark Library as Volume Transfer Destination (Alt + M)**.

**TIP:** You must highlight your branch name, not the system name, even if your library has only one branch. If your branch name does not display, (seen here on line 3) make sure your branch is selected in the Holdings Maintenance drop down list and that there is no check mark in Hide Empty Libs, then click refresh.

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

Click **OK**, or press **Enter**.
Next go back to the record with the item you wish to transfer. If you do not have it open, bring it up in a new tab.

Click on the call number of the volume(s) you wish to transfer to highlight that line.

**NOTE:** If there is more than one item attached to the call number, all the items will be transferred when you transfer the volume.

**TIP:** If you wish to transfer multiple volumes to the same record, press the Control key as you click on the call numbers to highlight them.

Right click or click on Actions for Selected Rows (Alt + F) and select Transfer Volumes to Previously Marked Library (Alt + T)

**TIP:** If this is not an active selection, you did not highlight a volume line. You need to highlight the line with only the call number.
A dialog box will open up allowing you to verify that the volume is being transferred to the correct record. Check it carefully!

**TIP:** You can click View MARC to look at the MARC record, if needed.

**NOTE:** If you have forgotten to mark the volume transfer destination, and you have transferred other volumes in the same session, the volume will be transferred to the last record you marked, so if the information is wrong, click Cancel (Alt + C).

**TIP:** Make sure the blue bar at the top of the window says “Volume Transfer.” If it says “Item Transfer,” then you are transferring only a single item (barcode), not the call number and item(s) as a unit.

If the information is correct, click **Transfer**.

A dialog box will pop up, confirming your transfer:

Click **OK**, or press **Enter**.
The screen will refresh, and your volume will no longer be attached to the original record.

**NOTE:** If there are no other items 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 you still have your destination record open in another tab, you will need to click **Refresh** to see the transferred item.

**Transferring Items from One Volume to Another**

Transferring items is very similar to transferring volumes. You can transfer items (copies/barcodes) from one volume (call number) 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.

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.

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To transfer items, in one tab, open the record where the item is currently in the Holdings Maintenance view.

Here we have two items attached to this volume. One is a hardback copy and belongs on this record. The highlighted item is a paperback edition which belongs on a different record.

**NOTE:** If you wanted to transfer both the items, you would use Transfer Volumes, not Transfer Items.

In another tab, open the record where you want the item to be.

When you transfer items, you are moving a copy from one call number to another, so if there is no appropriate call number attached to the record, you will need to add one, as in this case.
Highlight the branch name, and right click or click on Actions for Selected Rows (Alt + F). Select Add Volumes (Alt + V)

The Volume and Copy Creator will open in a new tab:

Enter your Call Number in the Call Number box, and then click Edit then Create without entering a barcode.
Your call number will be added with no items attached to it.

The call number is the location where you will transfer your item.

Click on the call number to highlight it. Then right click or click **Actions for Selected Rows (Alt + F)** and select **Mark Volume as Item Transfer Destination (Alt + M)**

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

![Dialog box](http://evergreen.lib.in.us)

Click **OK**, or press **Enter**.
Next go back 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 the barcode of the item you wish to transfer. Then right click or click on Actions for Selected Rows (Alt + F) and select Transfer Items to Previously Marked Volume (Alt + T).

A window will open up allowing you to verify that the item is being transferred to the correct record and volume. Note the volume (call number) is listed in the text at the top of the box. Here the volume is “TEEN FIC CHBOSKY.” Make sure the volume and record are correct!

TIP: You can click View MARC to look at the MARC record, if needed.

NOTE: If you have forgotten to mark the item transfer destination, and you have transferred other items in the same session, the item will be transferred to the last volume you marked, so if the information is wrong, click Cancel (Alt + C).

TIP: Make sure blue bar at the top of the window 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 (Alt + C).
A dialog box will pop up, telling you that the item has been transferred.

Click OK or press Enter.

The screen will refresh, and your item/barcode will no longer be attached to the original record.

**NOTE:** 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, Chapter 18*, if needed.
If you still have your destination record open in another tab, you will need to click Refresh to see the transferred item.

Transferring Volumes to a Different Branch

Items and volumes may also be transferred between branches. The process is the same as transferring between records.

Open the record with the items in Holdings Maintenance view. Make sure the branches are all displaying, as seen below.
If the branches are not displaying, select your library system from the Holdings Maintenance drop-down list.

Then select **This specialized library** from the Limit: drop down list.

Click the **Refresh** button, and all the branches will display:
Here we have a volume and item attached to the Hussey-Mayfield Memorial Branch which we will be moving to the Sullivan Munce Cultural Center.

To transfer volumes from one branch to another, click on the branch where you wish to transfer the volumes to highlight it. Then either right-click or click **Actions for Selected Rows (Alt + F)** and select **Mark Library as Volume Transfer Destination**.

A dialog box will open to tell you a branch has been marked:

The page at http://evergreen.lib.in.us says:

![Warning Message]

Library + Record marked as Volume Transfer Destination

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

Click on the Volume line of the item being transferred to highlight it.
NOTE: If there is more than one item attached to the call number, all the items will be transferred when you transfer the volume.

TIP: If you wish to transfer multiple volumes to the same record, press the Control key as you click on the call numbers to highlight them.

Right click or click on Actions for Selected Rows (Alt + F) and select Transfer Volumes to Previously Marked Library (Alt + T)

TIP: If this is not an active selection, you did not highlight a volume line. You need to highlight the line with only the call number.

A dialog box will open up allowing you to verify that the volume is being transferred to the correct branch and record. Check it carefully! The branch is highlighted in the example below. Be sure to check the title as well.

If everything is correct, click Transfer.

NOTE: If you have forgotten to mark the volume transfer destination, and you have transferred other volumes in the same session, the volume will be transferred to the last record and branch you marked, so if the information is wrong, click Cancel (Alt + C).

A dialog box will inform you the volume(s) have been transferred.

Click OK or press Enter.

The screen will refresh, and your volume(s) will be transferred to the selected branch.
Below you can see the volume and item are now attached to the Sullivan Munce Cultural Center.

**NOTE:** The Circulation Library and Owning Library will automatically change to the new branch, but the shelving location will not change. If you assign shelving locations at the branch level, you will need to use the Copy Editor to change the shelving location at this point. See Chapter 7—Using the Copy Editor if needed.

**Transferring Items to a Different Branch**

When you have multiple items attached to the same volume/call number and you do not wish to transfer all of them, or you wish to transfer some to one branch and some to another, you will use transfer items instead of transfer volumes.

To transfer items between branches, open the record with the items in Holdings Maintenance view. Make sure the branches are all displaying, as seen below.

If the all the branches are not displaying, see page 10.13.
When you transfer items, you are moving a copy from one call number to another, so if there is no appropriate call number attached to the branch where you will be transferring the item, you will need to add one, as in this case.

Highlight the branch name, and right click or click on **Actions for Selected Rows (Alt + F)**. Select **Add Volumes (Alt + V)**

The **Volume and Copy Creator** will open in a new tab:
Enter your Call Number in the **Call Number** box, and then click **Edit then Create** without entering a barcode.

Your call number will be added with no items attached to it:
The call number is the location where you will transfer your item.

Click on the call number to highlight it. Then right click or click **Actions for Selected Rows (Alt + F)** and select **Mark Volume as Item Transfer Destination (Alt + M)**

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

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

Next highlight the item you wish to transfer. Then right click or click on **Actions for Selected Rows (Alt + F)** and select **Transfer Items to Previously Marked Volume (Alt + T)**.
A window will open up allowing you to verify that the item is being transferred to the correct branch, record and volume. Note the volume (call number) is listed in the text at the top of the box. Here the branch is “SMCC.”

**NOTE:** If you have forgotten to mark the item transfer destination, and you have transferred other items in the same session, the item will be transferred to the last volume you marked, so make sure the volume and record are correct as well. If the information is wrong, click **Cancel (Alt + C)**.

**TIP:** You can click **View MARC** to look at the MARC record, if needed.

**TIP:** Make sure bar at the top of the window 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 transfer is correct, click the **Transfer** button. Otherwise, click **Cancel (Alt + C)**.

A dialog box will pop up, telling you that the item has been transferred.

Click **OK** or press **Enter**.
The screen will refresh, and your item/barcode will no longer be attached to the original record.

**NOTE:** The Circulation Library and Owning Library will automatically change to the new branch, but the shelving location will not change. If you assign shelving locations at the branch level, you will need to use the Copy Editor to change the shelving location at this point. See Chapter 7—Using the Copy Editor if needed.