Chapter 10 -- Transferring Volumes and Items

Transferring Volumes from One Record or Branch to Another

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

Bring up the record where the items 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 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.
To transfer items to this record, you will need to highlight the name of the branch name 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. 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.
Then, if you are transferring items from one record to another, open a new tab and bring up the record of the items 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.

Go to Actions for Selected Rows (Alt + f) and 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.
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 Transfer. If you have marked the wrong record or branch, or changed your mind, you can click Cancel to abort the transfer.

A dialog box will pop up, confirming your transfer:

Click OK, or press Enter.
Your volumes will disappear from the Holdings Maintenance screen in the current record or branch.
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 to other records.

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. 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)**.

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

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.
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 volume transfer destination, the last volume you have marked that day will be used. Note the volume (call number) is listed in the text at the top of the box.

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

A dialog box will pop up, telling you that the item has been transferred. Click **OK** or press **Enter**.
You will find that your item/barcode is no longer attached to this record.

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, do not forget to delete the call number. See *Deleting Volume Records from Evergreen*, page 18.3, if needed.
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.