

## 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 screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. The browser's address bar and menu bar are visible. The main content area displays the record summary for 'Twilight' by Stephenie Meyer. The record is identified as 'Record 3 of 90' and is currently viewed at the 'Hussey-Mayfield Memorial Branch'. The record summary includes fields for Title, Author, ISBN, Edition, Publication Date, Publisher, Physical Description, Format, and Abstract. A 'Place Hold' button is visible next to the record summary. On the right side, a dropdown menu titled 'Actions for this Record' is open, showing options such as 'OPAC View', 'MARC View', 'MARC Edit', 'Holdings Maintenance', 'View Holdings', 'Add to Bucket', 'Mark for Overlay', 'Delete Record', 'Undelete Record', 'Duplicate in New Tab', 'Remove this Frame', 'Set bottom interface as Default', and 'Reset Display'. The 'Holdings Maintenance' option is highlighted. Below the record summary, there are tabs for 'Copy Summary', 'Shelf Browser', and 'MARC Record'. At the bottom, there is a section titled 'View copy information for all libraries' with a table of columns: Library, Callnumber, Actions, Available, Checked out, In process, In transit, Reshelving, On holds shelf, and On order.

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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 and menu bar are visible. The main content area is titled "Record Summary" and "Holdings Maintenance".

**Record Summary:**

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

Record 3 of 90. Navigation buttons: Start, Previous, Next, End. Actions for this Record.

**Holdings Maintenance:**

PLFDP Plainfield Branch. Consortial Total: 3 Available: 1.

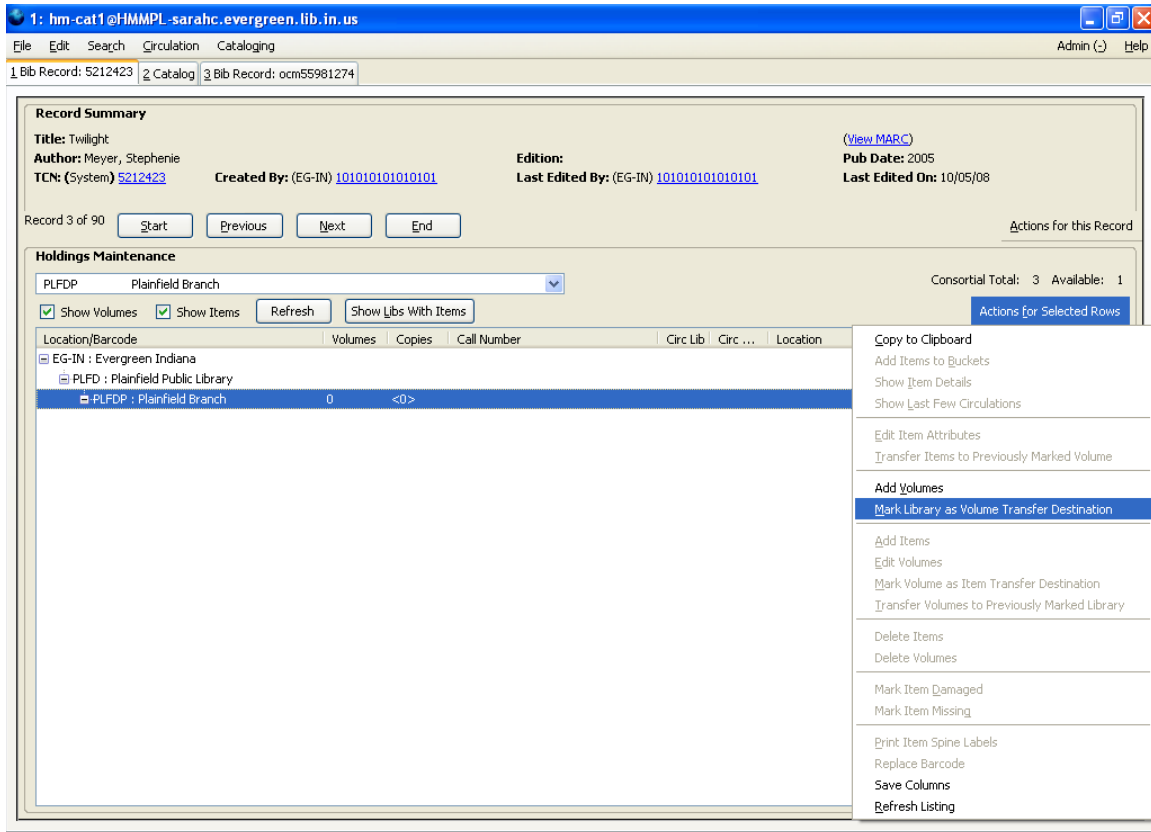
Options:  Show Volumes,  Show Items, Refresh, Show Libs With Items. Actions for Selected Rows.

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

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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**.

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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.

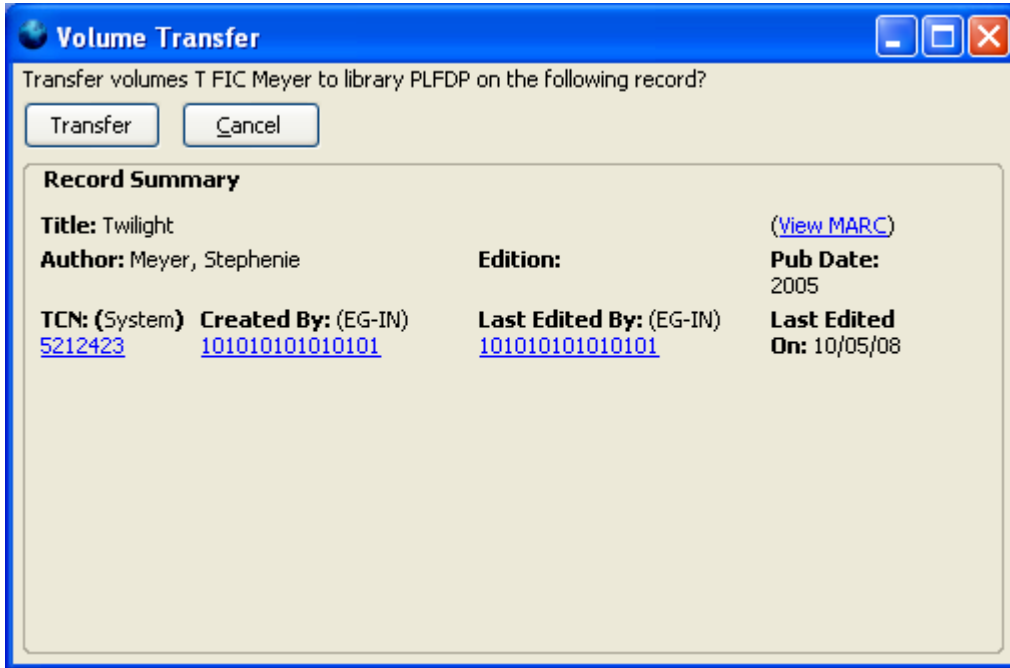
The screenshot shows the Evergreen cataloging system interface. At the top, there is a browser window with the address `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. Below the browser window, there is a menu bar with `File`, `Edit`, `Search`, `Circulation`, and `Cataloging`. The main content area is 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`). It also shows the Call Number (`ocm56807811`) and the record number (`Record 4 of 70`).
- Holdings Maintenance:** A table showing the holdings for the 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`. The table shows several rows of holdings, with the first row selected. The selected row has a call number of `T FIC Meyer` and 4 volumes.
- Actions for Selected Rows:** A menu that appears when a row is selected. It contains several options, including `Copy to Clipboard`, `Add Items to Buckets`, `Show Item Details`, `Show Last Few Circulations`, `Edit Item Attributes`, `Transfer Items to Previously Marked Volume`, `Add Volumes`, `Mark Library as Volume Transfer Destination`, `Add Items`, `Edit Volumes`, `Mark Volume as Item Transfer Destination`, `Transfer Volumes to Previously Marked Library`, `Delete Items`, `Delete Volumes`, `Mark Item Damaged`, `Mark Item Missing`, `Print Item Spine Labels`, `Replace Barcode`, `Save Columns`, and `Refresh Listing`.

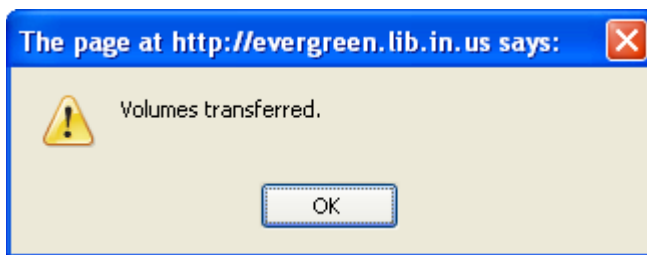
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A window will pop up asking you to verify the transfer. Check it carefully! If you have forgotten to mark the correct record transfer destination, the last location you have marked that day will be used. Check to make sure the information is correct, then click **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**.

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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  
 Edition: 1st ed.  
 Pub Date: c2005  
 TCN: (OCLC) [ocm56807811](#)  
 Created By: (EG-IN) [101010101010101](#)  
 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

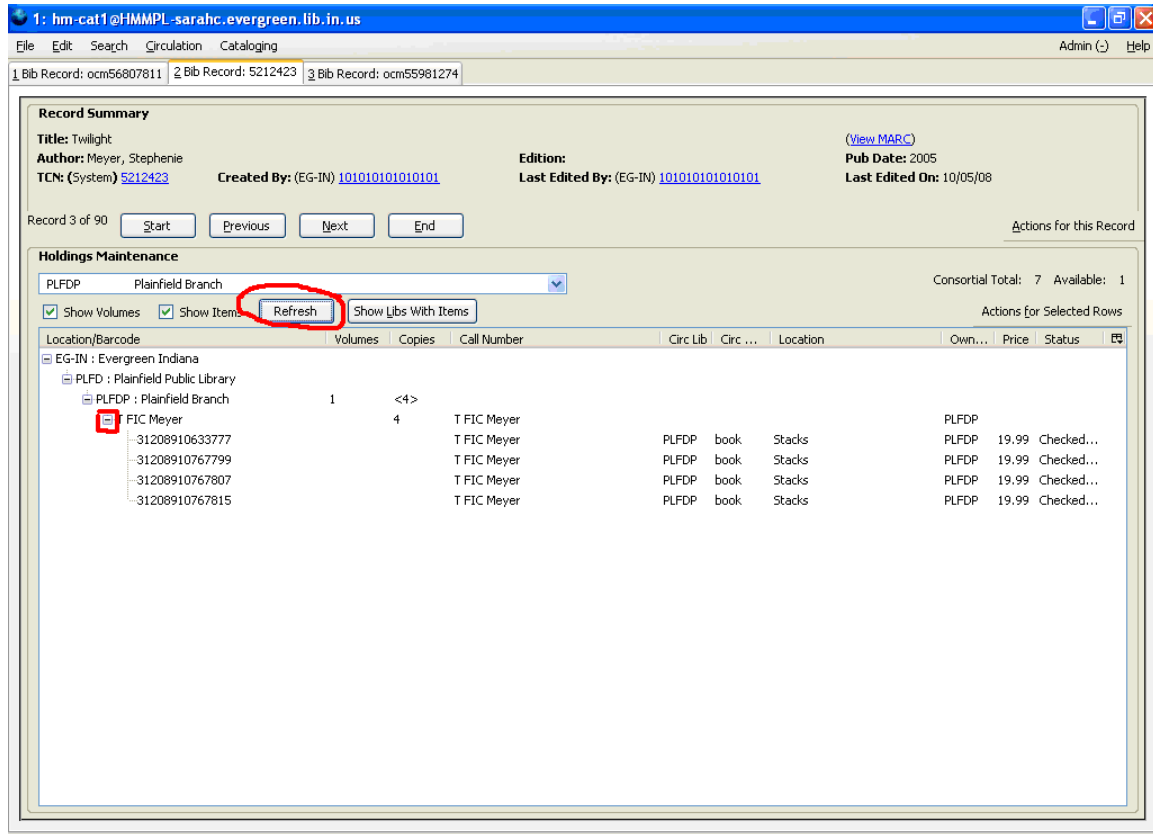
Show Volumes     Show Items    [Refresh](#)    [Show Libs With Items](#)    [Actions for Selected Rows](#)

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***

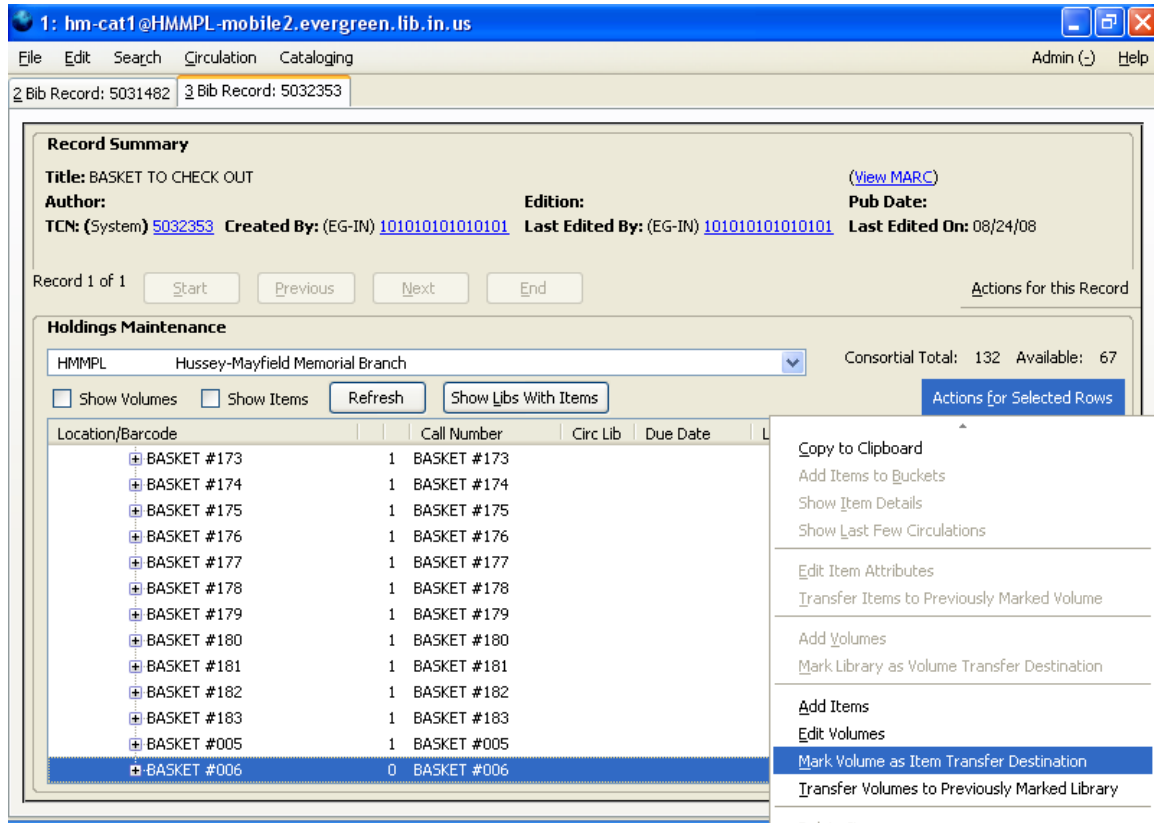
Transferring items is very similar to transferring volumes. You can transfer items from one volume to another within the same record or to other records.

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.

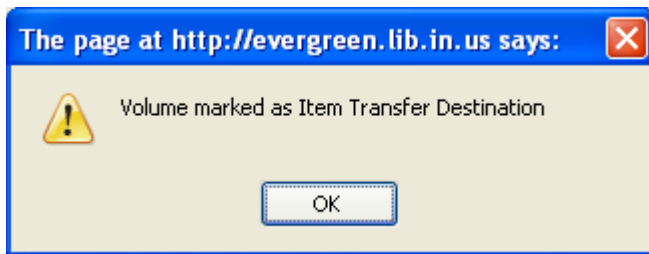
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In the Holdings Maintenance view, highlight the volume to which you would like to transfer your item. Then under **Actions for Selected Rows (Alt + F)**, select **Mark Volume as Item Transfer Destination (Alt + M)**.



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.



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The screenshot shows the Evergreen cataloging system interface. At the top, the browser address bar displays "1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us". The menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", "Admin (-)", and "Help". The main content area is divided into sections:

- Record Summary:** Displays metadata for a record. Title: BASKET #06. Author: (View MARC). Edition: (View MARC). Pub Date: (View MARC). TCN: (System) 5031482. Created By: (EG-IN) 101010101010101. Last Edited By: (EG-IN) 101010101010101. Last Edited On: 08/24/08.
- Holdings Maintenance:** Features a dropdown menu for location (HMMPL - Hussey-Mayfield Memorial Branch) and a table of holdings. The table has columns for Location/Barcode, Call Number, Circ Lib, and Due Date. A context menu is open over the table, with "Transfer Items to Previously Marked Volume" highlighted.

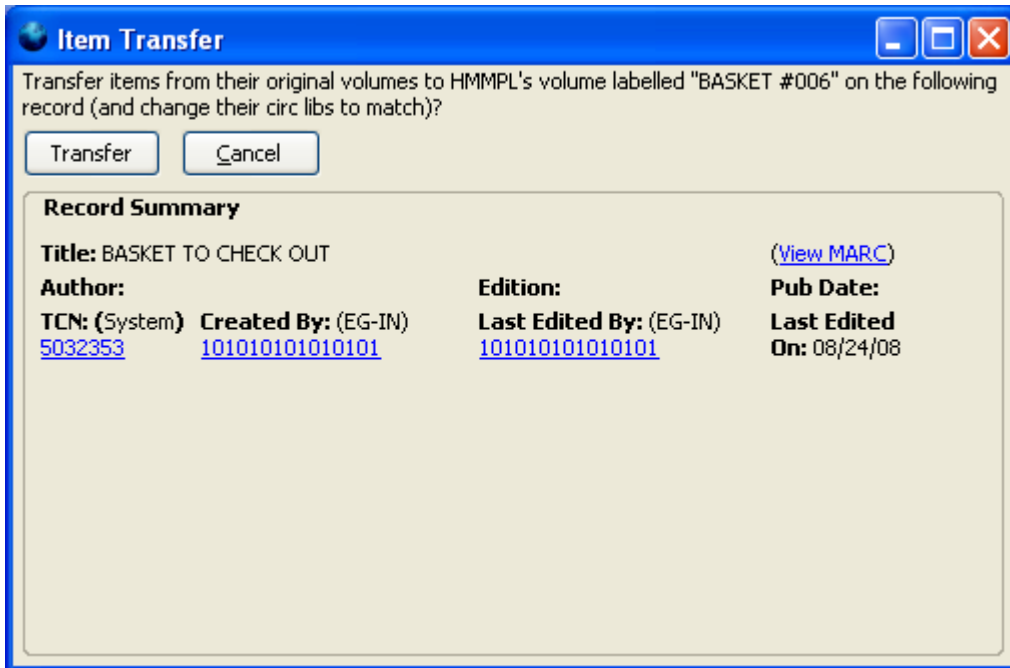
Location/Barcode	Call Number	Circ Lib	Due Date
EG-IN : Evergreen Indiana			
ZPL : Zionsville Public Library			
HMMPL : Hussey-Mayfield Mem... 1 ...			
BASKET #006	1 BASKET #006		
33946000050729	BASKET #006	HMMPL	

Highlight item/barcode that you wish to transfer. Then under **Actions for Selected Rows (Alt + F)** select **Transfer Items to Previously Marked Volume**.

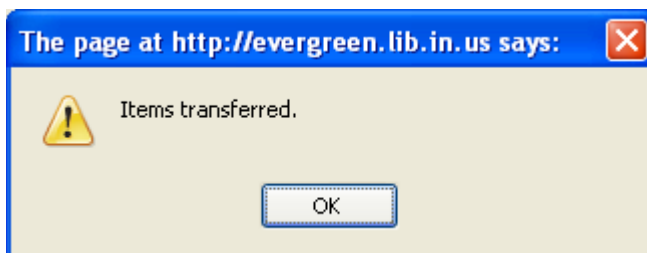
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A window will open up allowing you to verify that the item is being transferred to the correct record and volume. Check it carefully! If you have forgotten to mark the correct volume transfer destination, the last volume you have marked that day will 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**.

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You will find that your item/barcode is no longer attached to this 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". The address bar shows two bib records: "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". The text "Record 3 of 211" is on the left, and "Actions for this Record" is on the right.

The "Holdings Maintenance" section is below the navigation buttons. It includes a dropdown menu for "HMMPL" and "Hussey-Mayfield Memorial Branch". There are checkboxes for "Show Volumes" and "Show Items", and buttons for "Refresh" and "Show Libs With Items". The text "Consortial Total: 0 Available: 0" is on the right, and "Actions for Selected Rows" is on the right.

The holdings table has 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, do not forget to 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 interface includes a menu bar (File, Edit, Search, Circulation, Cataloging) and a toolbar (Admin, Help). The main content area is divided into two sections:

**Record Summary**

**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

Record 1 of 1 [Start] [Previous] [Next] [End] [Actions for this Record](#)

**Holdings Maintenance**

HMMPL Hussey-Mayfield Memorial Branch Consortial Total: 133 Available: 68

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

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	