



The Library

Item Maintenance : Transfers & Slides

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As a general rule, this work can be done through the Circulation client, in tandem with the Cataloguing client.

In the Cataloguing client, display the bib tree (hierarchy) for the item you wish to transfer to determine which of the following three procedures is appropriate.

A. Transferring all items from one holding record to a new location that does not yet have a holding record

1. Using Pick and Scan, set the **Holding Location** and **Permanent Location** to the new location.
2. If you are transferring items to a different branch, set the **Item Status** to "In Transit".
3. Wand the item's barcode.
4. Send the item to its new location.

The receiving branch is responsible for clearing the "In Transit" status, determining the proper location for the item, and any marking that may be required.

B. Transferring some (not all) items from one holding record to another holding record

For single-part items only (i.e. copies, not volumes)

1. In the Circulation client, click on the **Item** button and wand the item's barcode.
2. Click on the **Holdings** tab in the lower part of the **Item Record** window.
3. Select the holding record to which you wish to move this item.
4. Click on **Item** and then **Relink Holdings** in the menu. Click on **OK**.

5. In the Cataloguing client, verify that the procedure has worked by redisplaying the bib tree.
6. In the Circulation client, select the item you just moved, click on **Item** and then **Edit Item** in the menu. Go to the **Item** tab of the **Edit Item** window.
7. Set the **Perm. Loc.** to the new location. If you are transferring items to a different branch, set the **Item Status** to “In Transit”.
8. Click on **OK** to close the window and save the record.

The receiving branch is responsible for clearing the “In Transit” status, determining the proper location for the item, and any marking that may be required.

C. Sliding locations (interim procedures only)

Some sliding of serial volumes from one location to another can be accomplished by using the procedure outlined in (B) above, while some can not. Furthermore, the coding of locations for sliding titles may change in the future (handouts and/or training will be provided if/when they do).

In the interim do the following:

1. Use the same procedure outlined in (B) above.
2. Display and read over the summary notes for your branch's locations (the OPAC will gather all these summary, i.e. “Library has:”, notes together on a single web page for ease of comparison).
3. If the “summaries” are out-of-date as far as coverage dates, what ought to slide to where, location displays, or lack some critical holdings information that would prevent your patrons from finding the desired volumes, refer these records to your branch holdings maintenance staff or to LPC Central Serials.

D. All other transfer situations

1. Refer these to holdings maintenance staff members in your branch.