TRANSFER WIZARD IN J-CLIENT

There are several reasons to use the transfer function:

• A duplicate record is found in SIRSI. In this case we will do a record merge by using the transfer wizard. This prevents the loss of any circulation history.

• A long overdue book is returned. This item had been removed from the system, and a brief record was entered by Access Services upon its return. A search reveals a fully cataloged record that the item matches.

• The TECHSR list is being searched, and a search shows that the a matching full cataloging record is in IRIS. You wish to transfer it to the full record, while still retaining the circulation information.

• A circ-on-the-fly item has been returned, and a search reveals a fully cataloged record that the item matches. You wish to transfer the item to the full record, while still retaining the circulation information.

• A serial title has been changed, and a volume or two is on the wrong title. Our example will show two volumes that must be transferred for this reason.
Things that make you go UH OH!

Items that are in-transit cannot be transferred.
Copies and volumes/call numbers with links to reserves cannot be transferred.
Call numbers which are bound-with parents or child call numbers cannot be transferred.
Transfers cannot be made to or from titles which have been loaded for review, are locked for update, or are under accountability.
Transferring volumes/call numbers associated with a serial control record is prevented only if the entire catalog record would be removed. Although at least one call number must be retained to prevent the removal of the bibliographic record, as required by Unicorn; that call number can be associated with any library, regardless of the library or libraries associated with the serial control.
A copy which is linked to a booking calendar that contains a current booking record cannot be transferred.
Items which are marked as lost, discarded, or missing cannot be transferred. A warning message will appear when you attempt to transfer these items.
Determine your source and destination records

There will be one destination record, and one or more source records.

- The destination record is the record you want to transfer the others TO.

- The source record(s) are the records that you will transfer the item lines FROM. Frequently, once you Transfer the item lines to the destination record, the source record will be removed.
Compare the book to the Destination record

Make sure that the book that you wish to transfer to that record really is an exact match. Check the following Marc tags:

• Title (245) must match EXACTLY
• Author(s) (100s tags) must match EXACTLY
• Publication (260) must match EXACTLY
• Physical description (300) Size plus or minus 2 cm
• Physical description (300) Pagination plus or minus 10 pages.
• LC number (010) must match EXACTLY
• ISBN number (020) must match EXACTLY
IMPORTANT NOTE: BE SURE TO CHECK THIS!!!

Access Services will be entering Brief Records for long overdue and circ-on-the-fly books. The default for brief titles is to be SHADOWED. Before you can transfer any items from these records, you must make sure that the title, call number and items are all UNSHADOWED. Otherwise, the patron will never know that this item exists, since it will not show in the Webcat.
Other issues to be aware of when performing transfers

If you are transferring serial volumes, be sure to update the Marc holdings also!

If you are transferring journals that are Shelved by title, it may be necessary to relabel the volumes. It will be necessary to change the XX call numbers online so that the item lines sort properly.

Be sure to check for purchase orders attached to items you are transferring from the “Source” title. If there are any purchase orders attached to the Source title, confer with the Serials team before doing transfers to avoid any unintentional transferring of purchase orders from one title to another.
This is how the transfers wizard defaults should look.
Click on the Transfers icon, and start the process of linking

- Click on the Transfers icon.
- Call up your source record. I use the title or title control number.
- Highlight the title if there are more than one. Click the button on the bottom of the screen that says “Add to tree.” The item listings will be added to the Transfer tree pane.
- Click on the call number line and click the button that says Retain for Transfer. The line will become bold and italicized. See the next slide for an example.
Notice the selected item lines are bold and italicized. These are the call number lines from your source record.
The next thing that you will do is search the destination title. This will be the last listing that you will place in the Transfer tree pane. Click on the call number line that represents the destination and click “Add to tree.”

The next screen shows the destination item added to the tree and selected for transfer.
Here the destination record has been added to the bottom of the tree. Press the Transfer button to transfer the source item lines to the destination cataloging record.
Depending on how many item lines are transferred, a deletion confirmation pop up message may display stating that this operation will remove the title record. If you want to proceed with the transfer, click **Yes** or click **No** to cancel the transfer.

**SUCCESS!** The Transfer Operations Results pop-up screen shows that you have transferred these item lines to the destination record. The best thing about transferring an item line is that any circulation information will go with it.

Click OK, and you’re done!
Time to dot your “I’s” and cross your “T’s”

In some cases (e.g. brief records for circulating items), the record may end up with copy issues, for example two copy 1’s for LSM. Change one of them to a copy two. If you are adding an LSM book to a fully cataloged record for another library, this won’t happen.

If you are moving volumes of a serial from one record to another (as you would in case of a title change) check for the following things:
  • MARC Holdings must be corrected on both titles
  • XX call numbers used in Shelved by title class schemed items must match on the destination title; otherwise the volumes will not sort properly.
  • Be sure to check for purchase orders on serials before transferring any volumes, to avoid moving purchase orders onto the wrong record.
On the next slide, you can see the destination record, with the source record item lines now added to it. As you can see by this example, you can transfer more than one item line to the same destination record. Just click the item lines to be transferred after the record has been added to the transfer tree and click the Retain for Transfer button. Always add the destination record to the tree last.
Years 1966 and 1967 transferred
On the next slide you can see how the record looks in IRIS, with the item line transferred over. Please note, if you are transferring an item line from a periodical journal (with an XX call number), it will be necessary to change the XX call number to match the destination record, so that the volumes sort properly.
1966 and 1967 have now been transferred to the right record.
All done! Have a cup of coffee… You’ve earned it!

It does get easier and more automatic as you do more transfers.