Procedure for transferring items in SIRIS from one cataloging record to another

Introduction

We sometimes find that there are item lines of a title that need to be moved to another cataloging record. This will happen when there is a duplicate record on IRIS. In this case we will do a record merge. Record merges also happen when a book is given a brief record during circ on the fly, and later a matching fully cataloged record is found. Transfers also happen when a serial has undergone a title change, and we find back volumes which need to be transferred to the new title. It is not advisable to delete them from the old title’s item list and re-enter them onto the new title’s item list because information may be lost. The transfer function is also the way to go if any of the items are (or have been) charged out. When you transfer an item line that is charged out or has circulation history, the information goes right along with it.

The transfer process CANNOT be used when an item is in the Reserve system. It must be removed from Reserve before it can be transferred.

Set up your wizard

Add the TRANSFER wizard button to your toolbar. (This icon will look like a group of books on a booktruck.)

Set up your properties as follows:

Behavior—
Check all boxes

Default—
Display property page—Choose NEVER radio button
Search preferences—Type: Keyword, Index: Title, Library ALL

Helpers—
Check all boxes

Gather the information you need

You will need the title that the book is to be transferred TO (the destination title).
You will need the title that the book is to be transferred FROM (the source title).
You will need a list of the volumes or copies that need to be transferred.

Start the process….

1. Prepare the item to be transferred:
   - If the source title is Shadowed, unshadow it.
   - If the class scheme is AUTO, change it to match the destination title.
   - If the item is in home location TECHSR, change it to the proper home location.
2. Click on the Transfer icon. Search for the source title cataloging record by title.
3. Choose the correct choice on the list, and click on the title to highlight it. Click on the Add to tree button at the bottom left of the screen.
4. Click on the call number to be transferred. At this point, if you have more than one volume to transfer, you will click on all of the volumes that you wish to move. Click on the Retain for transfer button on the bottom right. Every call number that you have highlighted will now be in bold italicized font.

5. Go back up to the search window, and search the destination title. Highlight it, and click on the Add to tree button at the bottom left. Highlight the call number. Click the Transfer button.
   • If you are transferring a brief record item, transferring the call number to another record will delete the record. SIRSI will generate a Deletion Confirmation pop-up screen asking if you want to continue with the process.
   • Click Yes to complete the transfer.

6. A Transfer Operation Results screen will pop up telling you that the process is complete.

7. Check copy numbers on monographs. They may need to be changed.

8. Check MARC holdings and XX call numbers on serials. The MARC Holdings will probably need to be changed. The XX call numbers of the transferred volumes should match the XX call numbers of the destination title, otherwise they will not sort properly.

9. If there is an impediment to transferring the volume to the other cataloging record (e.g. the item is charged to RESERVE), SIRSI will not allow the transfer to take place.

10. Other Restrictions to Transferring a Title, Call Numbers, or Copies or Modifying Library Link--(Notes from the SIRSI help screen)

   The following information links are also affected by transferring items or modifying libraries:
   • 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.
   • Copies cannot be transferred to or from call numbers which are bound-with parents or child call numbers.
   • 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.

11. Help on this topic and answers to any questions can be found in the SIRSI help files. Click on Help on the right of the top tool bar, click on contents, and then choose the index option. Type in the word transfer and the program will take you to the help pages for the transfer function of SIRSI.

IMPORTANT NOTES:
If you are transferring serial volumes:

- Be sure to update the Marc holdings on both records!
- Be sure to check for purchase orders attached to the “FROM” title. If there are any purchase orders attached to the FROM title, confer with the Serials team before doing transfers to avoid any unintentional transferring of purchase orders from one title to another.

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