



## Traverse des Sioux Library System

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### Using the Transfer Wizard

Use this wizard with caution; you have the potential of deleting full bibliographic records. Use this wizard only when you want to retain circulation information.

- First double check the bibliographic records of the record you are transfer **TO** and check the bibliographic record you are transferring **FROM** to make sure you are transferring the correct records.
- Best practice is to write down the title control numbers found by clicking **Detailed Display** and once you see the record displayed, click on the **Control Tab** to find title control number. (This will ensure that you are using the correct bibliographic records). After some careful checking/double checking you are now ready to transfer.
- From the **Cataloging Toolbar** click on **Special** and select **Transfers**.
- Search for the bibliographic record that you want to transfer **FROM**. It is best to search using the title control number or the barcode, again this will ensure that you retrieve the correct record.
- To search by title control number type number how it appears under the control tab, including the o or a, change the index to **Title Control #**.
- The record will display in the lowest window, toward the bottom of the screen, **highlight** the record you want to transfer and click **add to tree** bottom. Now you will see the record displayed in the window in the middle of the screen.
- Click on the little **plus sign** that is in front of the title in the middle window. You are now expanding to see the call numbers and item records attached to this particular bibliographic record.
- Click on the call number that you want to transfer and click the **Retain for Transfer** button along the bottom of the screen. Notice this bolds and italicize the call number and item records that will transfer to the other bibliographic record.
- **DO NOT click on the title that could transfer all of the individual call numbers and item records.**
- Now search for the bibliographic record you wish your call number to be transferred **TO**.
- Again, search by title control number type number how it appears under the control tab, including the o or a, change the index to **Title Control #**.

- The record will display in the lowest window, toward the bottom of the screen, **highlight** the record you want to transfer and click **add to tree** bottom. Now you will see the record displayed in the window in the middle of the screen.
- Click on the title to highlight (in the middle window) that you want to transfer your call number **TO**.
- Click the **Transfer** button, this action will transfer your call number and item number to the second bibliographic record. If your library is the last library to hold the title, this action will delete the bibliographic record as well! Please call Cataloging if you performed this action with a full bibliographic record (the title control # starts with o). There are several more steps for Cataloging to make sure TdS holdings will be deleted from OCLC. If you have a short bibliographic record there is no need to call cataloging.