

Procedure for transferring holdings attached to monograph records

The Transfers wizard in WorkFlows is used to merge duplicate records and transfer holdings between records. Monograph duplicate records should be merged. (See Document 1: Cataloguing Standards, 2.4.3.1) If you find a record that has NEOS holdings that could be transferred, contact that NEOS library for them to make the transfer.

Transferring all holdings from a record (process for Merging duplicate records)

This will result in moving all holdings from one record to another. When all holdings are removed from a record using the Transfer wizard, that record is automatically deleted. When items are being transferred from a record, a dummy holding should first be created to retain the record and remove WorldCat holdings for OCLC member libraries. (See Document 1: Cataloguing Standards, 4.3.2)

- Verify that records identified are duplicate bibliographic records. There are sometimes several duplicates, especially involving older records and NEOS records. If it appears to be a match but is questionable, contact the library to have someone confirm the match. There is a [NEOS Cataloguing Contacts](#) list with information on staff who deal with these issues.
- Select one record that will remain and become the *transferred to* record
- Transfer all necessary information for your holdings from the record to be deleted, onto *transferred to* record, e.g. 090, 590, 690, 856 fields
- Add the record key (001) of the records that will be deleted to the 919 field in the *transferred to* record using subfield |b. E.g. 919 |b141846|b2058593. Subfield |a shall be used to record vendor control numbers for electronic resources. (See Document 1: Cataloguing Standards, 2.6.2.3)
- For records with OCLC member holdings that will be transferred, create a dummy item holding with location set to DISCARD, to remove WorldCat holdings (see instructions below)

Transferring partial holdings from a record

This results in moving partial holdings from one record to another.

- Delete all your necessary local fields (090's, 590's, 690's, 856's) from the *transferred from* record, and add them to the *transferred to* record.
- For OCLC member libraries with items that are transferred, create a dummy item in *transferred from* record to remove WorldCat holdings (see instructions below).

Using the Transfer wizard

See,

https://neos.library.ualberta.ca/Helps/Symphony/Workflows/English/Content/workflows/06-CatalogAuthority/Tran_Title_Call_Num_Wiz.htm#catauth_1304811785_1396896, for detailed instructions on using the Transfer wizard.

Dummy items for WorldCat holdings removal

Create in Call Number and Item Maintenance wizard with following details:

Call number = dummy item

Call library = YOURLIBRARY

Item ID = AUTO (will convert to automatic number)

Home location = DISCARD

Extended information: STAFF: create brief note explaining situation i.e. 'holdings transferred to [record key]', 'dummy item for record deletion', etc.

Serials

Records involving serials should be dealt with under their own procedures and by someone familiar with the Serials Control module of Symphony.

These are typically individual monograph records that could be moved to a serial record.