PROCEDURES FOR TRANSFERS TO STORAGE

Part 1 - PROCEDURES FOR TRANSFERRING LIBRARIES

Anytime you are going to transfer 10 or more items to Storage you will need to follow these procedures. (But not necessarily in this particular order)

A.   **Selecting and preparing materials for transfer**

1.   Ask Jennifer Fritz, the Innopac System Administrator, to assign an ICODE1 (item record field 02) to be entered in each record to identify it as part of a transfer project.   Because the locations will be changed through global update the materials need to be going to the same location.

2 .   Review books to be transferred. The workflows used to complete this process will differ among the libraries. Some libraries may move potential transfers from the stacks to a processing area at the beginning of the transfer process. Others may complete virtually all the processing in the stacks and remove the books from the stacks only to load them into bins for immediate shipment to the Storage Library. The processing steps listed below may be performed in any order. The processing described in this section typically takes several weeks (up to several months). Shortly before you have completed the steps in this section you should also begin the steps for actual movement of the materials to the Storage Library, as described in Section C, below.

   a.   Items must be cleaned (vacuumed) and minor repairs completed prior to moving. If the binding is broken and/or pages are loose, the minimum repair would be tying with ribbon. Mylar, boxing, or tipping in pages are also options. Unbound or soft covered items should be boxed or bound prior to transfer.

   b.   Item records must be corrected prior to transferring items to Storage. Location changes will be made by Catalog & Metadata Services in global update from a review file (see Part 3, below) but incorrect call numbers and "not in Inno" records should be corrected before including the item in the transfer project. Instructions are given in Part B, below.

   Sending libraries may begin the transfer process by searching Innopac for a record.

   c.   When the items have been cleaned and the catalog records reviewed, you are ready to update item records in Innopac.

B. **Updating Innopac records**

Following the steps below, call up each item record in Update Item (no review files) within the Circulation module.

> Type **C** = CIRCULATION subsystem
> Type **initials** and **password**
> Type **A** = ADDITIONAL circulation functions
> Type **D** = UPDATE an item record (no review files)
> Type **initials** and **password**
> Select `S > SUMMARY of all attached records` to list display any multiple item records which might exist. Enter the number of the correct item record if more than one appears.

When asked which item you wish to update, begin with a call number search, using the following to indicate the type of call number:

> "**c**" for **LC**
> "**m**" for **Dewey**
> "**l**" for **Old Dartmouth**
> "**f**" for **accession**
> "**g**" for **SuDoc number**

If you don't find the record on the first try, DO NOT assume it is not in Inno. In the case of multiparts, your search should include the volume in the call number field, using whichever indicator(s)--such as v., t., vol, etc.--seem appropriate. If you still do not find the record you need, search by title and or author. If you find the record but the call number is either incorrect or indexed improperly (Old Dartmouth numbers in the LC index, for example), update the item for the transfer (ICODE1 and barcode) and email Cataloging.Metadata.Services@Dartmouth.EDU with the Innopac Bibliographic number and information on what needs to be corrected. If you do not find a record, follow the procedures outlined below under "IF NOT FOUND IN INNO."

If a correct record is found in Inno

Update the record to add the barcode and the appropriate ICODE1.

Select the 02 field (ICODE1) and enter the appropriate shipment number.

Be sure you are in the MARC format mode. Type "I" to insert a field for the barcode. You will be asked to enter the "tag of the new field;" enter [**b**] for barcode. The line "`BARCODE    MARC tag 950`" will appear. Enter a [**return**]. (If you are not in MARC, this message will simply say "barcode." In that case, type a plus (*) to enter the MARC mode.

Type **[|z]** and **[wand in Barcode]**. The "|" is a vertical bar, not a letter.

Type **[q]** and **[m]** to quit updating that record and make the changes permanent.

If a correct record is NOT found in Inno

If the item is one volume of a multi-volume set and the rest of the record is correct, follow the "**Procedures to create volume item records,**" http://www.dartmouth.edu/~libacq/docs/SRT/MULTIPART.HTML and then adding the ICODE1 and barcode as described in the previous section.

If you cannot find a record in Inno send the book Cataloging and Metadata Serivces with a note explaining the situation.   Once the item has been catalogued (with the Storage location) it will be sent directly to Storage

If you have questions about any of these procedures, email Cataloging.Metadata.Services@Dartmouth.EDU or Marie.T.Guerin@Dartmouth.EDU

C.   **Moving the materials to Storage**

Contact the Storage Library Assistant that you will be transferring materials to Storage, approximately how many volumes you will be transferring and approximately when you would like to ship them. They will also schedule you for the use of Storage bins for moving the materials.   Because bins tend to be in short supply, you will typically have bins for only a week or so at a time but they should be "reserved" well in advance of the anticipated shipment date. Most processing should be completed before bins are delivered and packing begins. In all cases, scheduling with Storage must be completed a week ahead of the actual move.

D.   **Updating Item Locations (Access Services Procedures)**

After all the books and item records have been barcoded and updated, you then do a search on the ICODE1 to create a review file of ITEM records. Follow procedures for "creating review files." When the review file has been sucessfully created:

1.   SORT by a) bib call number, b) item call number, c) volume number. The sort will probably not be in perfect shelflist order.

2.   Create a printout of your review file. You can print from the attached Canon printer ("notice printer") or ask the Innopac Coordinator to print your list on a system printer. In either case, by selecting fields within the **LIST** option, the following information should be included on your printout.

title

call number (bib)
call number (item)
barcode
status

Review the list for accuracy. The list should include all items to be transferred (and any summary item records) and no others. If you discover errors (improperly entered barcodes, etc.) on the list, you can correct them by following the normal "Update Item" procedures in the circulation module. If an item is not being transferred but appears on the list, you can "delete" it from the list in "create lists." When in "create lists," the delete removes the record from the list but does not "delete" it from the database. If you are sending material which does not appear on the list, you probably did not enter the ICODE1 correctly. Please notify the Innopac Coordinator and DO NOT SEND THIS MATERIAL UNTIL IT APPEARS ON YOUR LIST! If you are making numerous corrections, you may want to run a "clean" list which incorporates your updates to send to Storage. You may want to note the number of items transferred to Storage as this information may be requested for your annual report.

3.   Pack all transfer item in bins (if this has not been done already) and include a copy of your list with the material transferred. Confirm the time/place for FOM to pick up the materials and coordinate all details with the Storage Library Assistant.

PART 2 - STORAGE LIBRARY PROCEDURES

1.   Unpack bins, compare items to printed list. Be sure you have received everything on the list and nothing more.

2.   Shelve materials according to procedures. Annotate "packing list" with shelving locations.

3.   Notify Cataloging & Metadata Services that the materials have been received and the list is correct. Cataloging will update the locations and remove the icode1 on the item record list

Part 3 – CATALOGING AND METADATA SERVICES PROCEDURES

A.   <u>Ongoing error correction</u>

Cataloging will make the appropriate corrections to the rest of the Inno record and add records that are Not In Inno.