How to Use the Transfer Wizard

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This cheat sheet is available here: https://rb.gy/55saou
A video of this procedure is available here: https://youtu.be/kONQ2fztvIM

If you find an OCLC record in WorkFlows that matches an item currently attached to a brief record or the wrong OCLC record (e.g., a Blu-ray attached to a DVD record), follow the instructions below. You will use the Transfer wizard to move your item from the brief or wrong record onto the matching OCLC record in WorkFlows. You may transfer only your own library's items.

When you use the Transfer wizard, circulation and inventory statistics transfer with the item. If you attach a new item to the OCLC record and delete the item attached to the brief or wrong record, you will lose that item's statistics.

Libraries that only occasionally need to use the Transfer wizard are encouraged to contact the RSA Help Desk to transfer the item on their behalf.

- For instructions how to report a brief item in need of transfer to a matching OCLC record in WorkFlows, refer to the section "Duplicate Records in WorkFlows – Scenario 1" in the document "Procedures for Reporting Cataloging Issues That Are Not Cataloging Requests," available here: https://rb.gy/ns38sn.
- For instructions how to report an item on the wrong OCLC record that is in need of transfer to the correct record in WorkFlows, refer to the section "Item Owned by Your Library on the Wrong Record" in the document "Procedures for Reporting Cataloging Issues That Are Not Cataloging Requests," available here: https://rb.gy/ns38sn.

Please contact the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083 if you need assistance with the Transfer wizard.

1. Log into WorkFlows using your individual cataloging login or the TECH login, if you have not yet been assigned an individual login.
2. Go to the Cataloging module.
3. Click on the Special toolbar on the lower left side of the screen.
4. Click on Transfers.
5. Search for the OCLC record onto which you want to move your item currently attached to the brief or wrong OCLC record.
6. When you find the desired OCLC record, click the <Add to Tree> button at the bottom of the screen. Then that OCLC record will appear in the white box in the middle of the screen.

7. Search for the brief or wrong record with the item you want to move onto the desired OCLC record.
8. When you find the brief or wrong record, click the <Add to Tree> button at the bottom of the screen. Then the brief or wrong record will appear second in the white box in the middle of the screen, below the desired OCLC record.
9. In the white box, click on the + sign next to the brief or wrong record. This expands the brief record.
10. Click on the + sign next to your library's WorkFlows code. This further expands the brief or wrong record.
11. Click on the line that contains the call number and your library's WorkFlows code.
    - If your library has multiple items attached to the brief or wrong record, hold down the Shift key on your keyboard. Click on the call number and library code lines for the rest of your items.
    - If another library also has items attached to the brief or wrong record, you will only be able to transfer your items.
12. Click the <Retain for transfer> button at the bottom of the screen. Then the call number and your library code line(s) will appear italicized, in blue.
13. In the white box, click on the title and author line for the desired OCLC record. No need to click this record's + sign to expand it. The record should be highlighted in blue after you click on its title and author.
14. Click the <Transfer> button at the button of the screen.
15. One of the following will happen:
    - If your item is the only one attached to the brief or wrong record, a pop-up will appear with this message: "This operation will remove the title record. Do you want to continue?" Click <Yes>.

                                        or
    - If there are other items still attached to the brief or wrong record, the pop-up with this warning will not appear.
16. Another pop-up will appear, confirming that the transfer succeeded. Click <OK>.
    - This pop-up will also let you know if the transfer failed. The reason for the failure (e.g., "Title key is not unique") will be provided at the right.
    - Contact the RSA Help Desk for assistance if you see the "Title key is not unique" or any other error message.
17. Click the <Remove from tree> button at the bottom of the screen to remove the record from the white box.
18. You are ready to transfer another item, repeating the steps above, or click <Close> at the bottom of the screen to exit the Transfer wizard.