

## **collectionHQ**

### **Grubby Items Refresh and Transfer Instructions**

#### **Table of Contents**

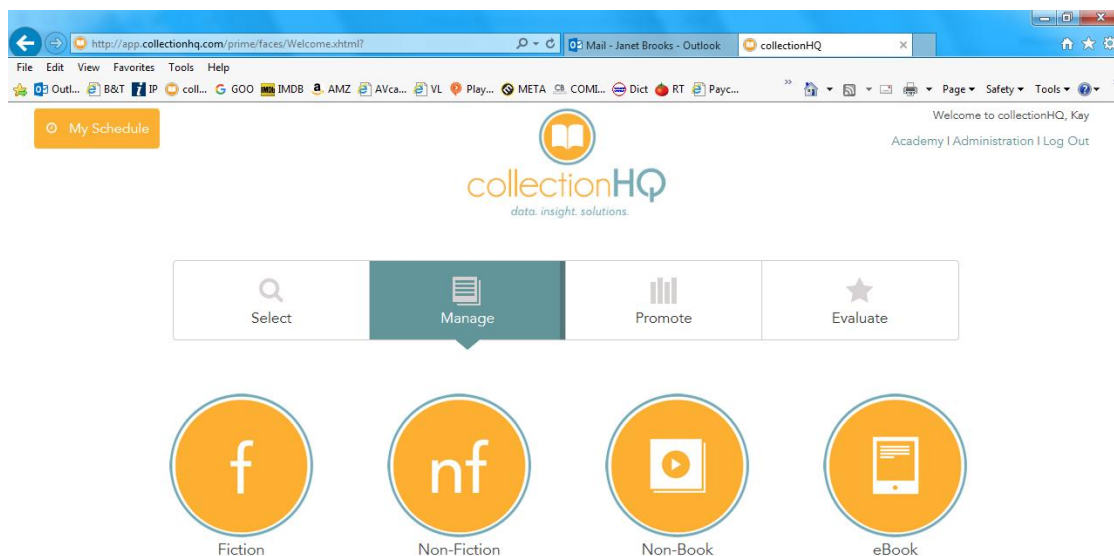
<b>Topic</b>	<b>Page</b>
<b>Login and Landing Page</b>	<b>1</b>
<b>Scheduled Assignments</b>	<b>2</b>
<b>Collection Checks</b>	<b>3</b>
<b>Non-Fiction Collection Checks</b>	<b>4</b>
<b>Fiction Collection Checks</b>	<b>5</b>
<b>Collection Check Action Plan</b>	<b>6</b>
<b>Collection Refresh</b>	<b>7</b>
<b>Non-Fiction Grubby Items Refresh</b>	<b>8</b>
<b>Fiction Grubby Items Refresh</b>	<b>9</b>
<b>Grubby Items Refresh Action Plan</b>	<b>10</b>
<b>Transfer Lists</b>	<b>12</b>
<b>Non-Fiction Transfer List</b>	<b>13</b>
<b>Fiction Transfer List</b>	<b>14</b>
<b>Transfer Action Plan</b>	<b>15</b>
<b>Processing Transfers</b>	<b>16</b>

## Log In

- To access the software just visit the website [collectionhq.com](http://collectionhq.com). You can access the website from any computer, laptop or iPad.
- Log in with your email and for first time users the generic password is Metro123. You can change the password by going to the Administration tab, then to “**My Account**”. Be sure to save the new password.
- If you cannot access the program, contact Janet Brooks or Melissa Weathers in MSL. They may need to set you up as a user.

## Landing Page

- On the landing page you'll see 4 large circles that designate collection divisions: F (Fiction), NF (non-fiction), Non-book, and ebook.
- Above the circles is the “**Manage**” tab. This tab is where you generate reports that will help you manage your collection.



## Scheduled Assignments

MSL will set up scheduled assignments for each part of the collection for every dataset.

- In the upper left-hand corner of the first screen you will see a box called **“My Schedule”**. This is where you can see your assignments by date.
- When you are assigned to work a particular report, you and your supervisor will be sent an email when it is time to work that assignment. (See the attached schedule that outlines when specific sections will be assigned and for due dates.)
- Click on the first assignment.
- The pop-up screen **“Task Summary”** gives you general information about the assignment.
- Click on the greyed out **“Task Name”** and you’ll automatically go to the report.
- At the bottom of the screen next to **“Completed”** is a box for you to check when you have completed the assignment. Please note that if two or more people share an assignment, the first person to mark complete causes the entire assignment to be marked complete. Please check with others assigned to the task before marking complete.

The screenshot displays the CollectionHQ Scheduling interface. At the top, there's a navigation bar with the URL <http://app.collectionhq.com/chq/faces/admin/ScheduleManagement.xhtml?ModulesSCH>. Below the navigation bar, there's a filter section with 'View Schedule: Users' set to 'Janet Brooks' and 'Format: Dataset month'. The main area shows a grid of scheduled assignments, with the first column displaying dates from 24-Oct-2015 to 24-Sep-2016. A 'Task Summary' pop-up is open, showing details for the assignment 'DN-Grubby Items Refresh (ANF 900s)'. The pop-up includes fields for 'collectionHQ Tool', 'Task Name', 'Dataset Became Available', 'Action Task', 'Recurrence', 'Number of Occurrences', 'Assigned To', and 'Collection'. It also has a 'Person(s) Responsible' field and a 'Notes' section with instructions on how to use the tool. At the bottom, there's a 'Completed' checkbox.

24-Oct-2015	24-Nov-2015 (Expected)	24-Dec-2015 (Expected)	24-Jan-2016 (Expected)
27-Oct-2015: System Wide Pop Author Juv Fic	25-Nov-2015: System Wide Pop Author YA Fic	25-Dec-2015: System Wide Pop Author Juv Fic	25-Jan-2016: System Wide Pop Author YA Fic
16-Nov-2015: DN-Grubby Items Refresh (ANF 900s)	26-Nov-2015: Coll Use Adult NF	31-Dec-2015: System-Wide Top Chart Juv Fic	28-Jan-2016: Coll Use Adult DVDs
			31-Jan-2016: System-Wide Top Chart Juv Fic

24-Apr-2016 (Expected)	24-May-2016 (Expected)
25-Apr-2016: System Wide Pop Author Juv Fic	25-May-2016: System Wide Pop Author YA Fic
01-May-2016: System-Wide Top Chart Juv Fic	26-May-2016: Coll Use Adult NF
	28-May-2016: Coll Use Adult DVDs
	31-May-2016: System-Wide Top Chart Juv Fic

24-Aug-2016 (Expected)	24-Sep-2016 (Expected)
25-Aug-2016: System Wide Pop Author Juv Fic	25-Sep-2016: System Wide Pop Author YA Fic
26-Aug-2016: Coll Use Adult NF	28-Sep-2016: Coll Use Adult DVDs
31-Aug-2016: System-Wide Top Chart Juv Fic	01-Oct-2016: System-Wide Top Chart Juv Fic

**Task Summary**

collectionHQ Tool: Grubby Items Refresh (Non-Fiction)

Task Name: DN-Grubby Items Refresh (ANF 900s)

Dataset Became Available: 26-Oct-2015

Action Task: 21 Days after Dataset

Recurrence: Year

Number of Occurrences: 3

Assigned To: Downtown

Collection: Adult: 900.000000 (General History) - 999.999999 (History of Other Areas)

Person(s) Responsible:

Notes:

- Click on Run • Go to Layout Options (upper center screen). Click "Use this Non-Fic" • Print List (small icons upper left side of screen). Either print or PDF. • Check the condition of each item on report. • Still in good condition? Click in the box under the "Extend" column and return to shelf. • Not in good condition? See if there is another copy available listed immediately below title and click the box under the "Transfer" column. • If no copy available consider submitting a replacement req

Completed: ☐

## Collection Checks

Prior to working other collection management lists (Grubby Refresh, Dead Items Refresh, etc.) you should complete a “**Collection Check**” for each of the areas of the collection. This report lists items that have not circulated in 4 years or more. *(Please note that in the future, staff will work collection checks that cover items that have not circulated in 2 years or more)* It does not include Reference items or items marked as anything but “on shelf” for your library. Any items not found should be marked as Missing in CarlX.

- If you are not working a scheduled assignment, you can prepare reports for any section of the collection.
- Each section of the collection can be managed by clicking on the “**Manage**” tab and then selecting the area you want to work on, Fiction, Nonfiction, Nonbook, etc. Each section has the same options in the drop down menu on the left side of the screen.
- The drop-down menus include various reports that can be generated for that section of the collection.
- To obtain a “**Collection Check**” report, click on the “**Collection Maintenance**” drop-down menu. There are several ways to configure the reports—a system wide or for each library, and then collection sections within each.

## Non-Fiction Collection Check

collectionHq  
Non-Fiction

Collection Check - A Branch Action Plan of items that meet the "collection check" criteria to help identify missing items. Missing items may be updated in your ILS in order to cleanse the catalogue

Collection Maintenance

System Wide Collection Check Summary

Collection Check

Long Overdue Check

Collection Demand

Collection Refresh

Collection Removal

Floating Reserve

Collection Action

Collection Check

Dataset Name: 24-Oct-2015

Region Name: All

Library Name: Almonte

Audience: Adult

Class Range From: 000.00000 (Theory of Knowledge)

Class Range To: 999.99999 (History of Other Areas)

Category Filter: All

Non-Fiction Collection Code: All

New Entries Only: No

- After you click on “**Collection Check**”, a pop-up box will appear on the right side of the screen with drop-down boxes to help you identify what library, area, and audience you want. If you are in the Nonfiction module, you’ll have the following options (see the above example):
  - The “**Dataset Name**” will display the most recent dataset automatically.
  - At this time, no “**Regions**” are set up, so leave this box set at “**All**”.
  - Choose your library from the “**Library Name**” drop down menu.
  - Determine the “**Audience**” you want, Adult, Juvenile, or Teen/YA.
  - Click on the arrows next to the box for “**Class Range From**” and scroll to the area where you want to start the report. Then click on the area next to the “**Class Range To**” and scroll to the area you want to end the report.
  - Click on the “**Collection Code**” you want to work, if you are working a special collection such as BHC, or Career Guidance (Jobs). Otherwise, leave it at Adult Nonfiction or Juvenile Nonfiction, etc.
  - If you click yes on “**New Entries Only**”, displays only items for which this is the first time they have appeared in this action plan.
  - Click Run.

## Fiction Collection Checks

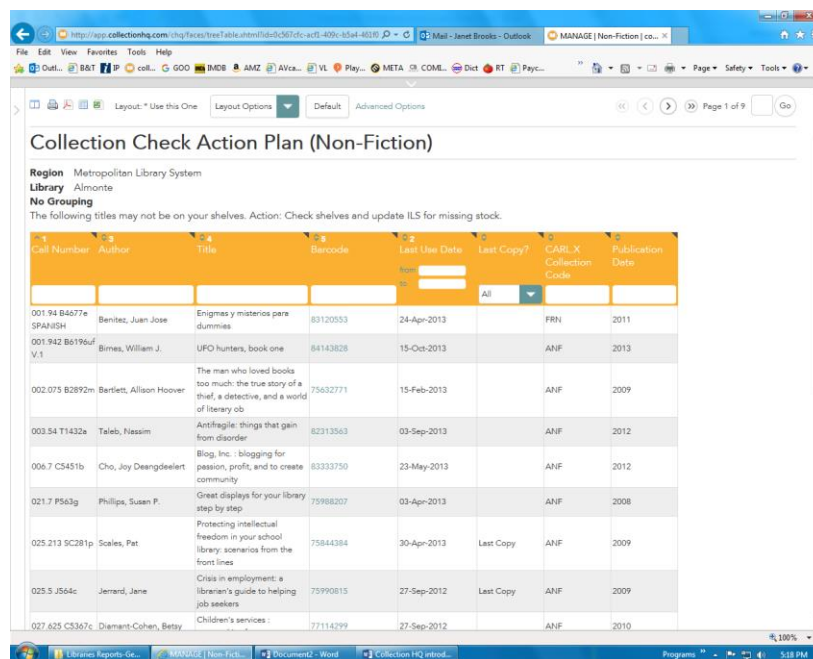
- If you are in the Fiction module, you'll have a few less options (see the example below):
  - The “**Dataset Name**” will display the most recent dataset automatically.
  - At this time, no “**Regions**” are set up, so leave this box set at “**All**”
  - Choose your library from the “**Library Name**” drop down menu.
  - Click on the “**Collection Code**” you want to work, (Adult Book, Mystery, Easy, etc.)
  - If you click yes on “**New Entries Only**”, displays only items for which this is the first time they have appeared in this action plan.
  - Click Run.

The screenshot shows the 'collectionHQ' interface for 'Fiction' collection checks. The sidebar on the left lists 'Collection Maintenance' options: System Wide Collection Check Summary, Collection Check, Long Overdue Check, Collection Demand, Collection Refresh, Collection Removal, Floating Rebalance, and Collection Action. The main area is titled 'Collection Check' and contains the following fields:

- Dataset Name: 24-Oct-2015
- Region Name: All
- Library Name: Almonte
- Collection Code: All
- New Entries Only: ☐
- RFID:

Below these fields, a list of collection codes is shown: All, Adult Book, Book Fiction, Adult Paperback [AF], and Black Heritage Collection [AF].

## Collection Check Action Plan



**Collection Check Action Plan (Non-Fiction)**

Region: Metropolitan Library System  
Library: Almonte  
No Grouping  
The following titles may not be on your shelves. Action: Check shelves and update ILS for missing stock.

Call Number	Author	Title	Barcode	Last Use Date	Last Copy?	CARL X Collection Code	Publication Date
001.94 B4677e SPAJ:JSH	Benitez, Juan Jose	Enigmas y misterios para dummies	83120553	24-Apr-2013		FRN	2011
001.942 B6196uf V.1	Bimes, William J.	UFO hunters, book one	84143628	15-Oct-2013		ANF	2013
002.075 B2892m	Berlett, Allison Hoover	The man who loved books too much: the true story of a thief, a detective, and a world of literary ob	75632771	15-Feb-2013		ANF	2009
003.94 T1432a	Taleb, Nassim	Antifragile: things that gain from disorder	82313563	03-Sep-2013		ANF	2012
006.7 C5451b	Cho, Joy Deangdeellert	Blog, Inc. : blogging for passion, profit, and to create community	83333750	23-May-2013		ANF	2012
021.7 P563g	Phillips, Susan P.	Great displays for your library step by step	75998207	03-Apr-2013		ANF	2008
025.213 SC281p	Scales, Pat	Protecting intellectual freedom in your school library: scenarios from the front lines	75844384	30-Apr-2013	Last Copy	ANF	2009
025.5 J564c	Jernard, Jene	Crisis in employment: a librarian's guide to helping job seekers	75990815	27-Sep-2012	Last Copy	ANF	2009
027.625 C5367c	Diamond-Cohen, Betty	Children's services	77114299	27-Sep-2012		ANF	2010

- To aid in viewing the report, Go to the top of the page and click on the drop down menu next to “**Layout Options**” and click on “**Use this One...**”. This will give you a predetermined layout that excludes some extraneous information. You can click on the arrow at the left side of the page to see what other columns are available. If you’d like to add these columns back to your report, you can drag and drop them to where you want them.
- You can sort the data in the columns, for example you can sort call numbers in order, or other criteria in order (such as oldest date) by clicking on the header of each column.
- To print out a list to take to the shelves, use the PDF command at the upper left above the report. (CollectionHQ can be used on the iPads each library owns. To access through the iPad, go to Safari, and type [collectionhq.com](http://collectionhq.com) in the search line. You’ll be taken to the webpage where you can log in to the program)

## Collection Refresh

CollectionHQ has a special set of reports to identify items that circulate very well at your branch and to identify items at other libraries with low circulation and are “dead” that can be used to “refresh” your collection through transfer of those items.

“***Grubby Items Refresh***” is one report found under “***Collection Refresh***”. “Grubby” items are items that have circulated more than a designated number of times. Right now, the default number of circulations is “40” for most libraries. This number can change and it is flexible. As with the *Collection Check*, you can run a *Grubby Refresh* report for any section in your library.



## Non-Fiction Grubby Items Refresh

The screenshot shows a web browser window displaying the 'Non-Fiction Grubby Items Refresh' application. The interface includes a sidebar with navigation options: Collection Maintenance, Collection Demand, Collection Refresh, Overstocked Subject Swap Summary, Grubby Items Refresh (selected), Dead Items Refresh, Collection Removal, Floating Rebalance, and Collection Action. The main content area is titled 'Grubby Items Refresh' and contains a form with the following fields:

- Dataset Name: 24-Oct-2015
- Region Name: All
- Library Name: Almonte
- Audience: Adult
- Class Range From: 000.000000 (Theory of Knowledge)
- Class Range To: 999.999999 (History of Other Areas)
- Category Filter: All
- Non-Fiction Collection Code: All
- On Shelf: Yes
- Restrict to Format Groups: Yes, restrict to titles of the same format

A 'Run' button is located at the bottom right of the form.

- For Nonfiction (see sample above):
  - After you click on “**Grubby Items Refresh**” a box will pop up on the right side of the screen with boxes to identify library, area, and audience.
  - The “**Dataset Name**” will display the most recent dataset automatically.
  - At this time, no “**Regions**” are set up, so leave this box set at “**All**”.
  - Choose your library from the “**Library Name**” drop down menu.
  - Determine the Audience you want to work, Adult, Juvenile, or Teen/YA.
  - Click on the arrows next to the box for “**Class Range From**” and scroll to the area you want to start the report. Then click on the area next to the “**Class Range To**” and scroll to the area you want to end the report.
  - Click on the “**Collection Code**” you want to work, if you are working a special collection such as BHC, or Career Guidance (Jobs). Otherwise, leave it at Adult Nonfiction or Juvenile Nonfiction, etc.
  - “**On Shelf**”. This shows the on shelf status of items at the time of extract. By default only items which were on shelf at the time of extract will be returned. To see all items irrespective of whether they were IN or OUT at the time of extract select “**All**”.
  - For “**Restrict to Format Groups**” click on “**Yes, restrict to titles of the same format**”.
  - Click Run.

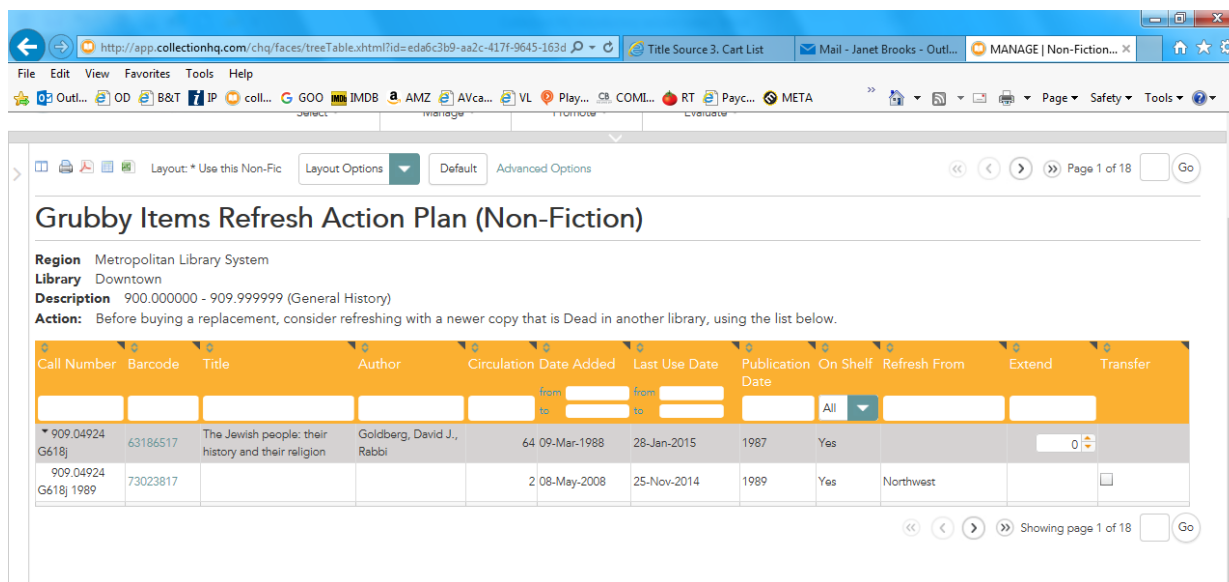
## Fiction Grubby Items Refresh

The screenshot shows the 'collectionHQ' web application interface. The main heading is 'MANAGE Fiction'. Below it, a description states: 'Grubby Items Refresh - A Branch Action Plan of items that meet Grubby criteria and may be inspected. Items may be removed, replaced using the transfer tools or shelf life extended.' On the left is a sidebar menu with options like 'Collection Maintenance', 'Collection Demand', 'Collection Refresh', 'Grubby Items Refresh', 'Dead Items Refresh', 'Collection Removal', 'Floating Rebalance', and 'Collection Action'. The 'Grubby Items Refresh' option is selected. The main form area contains several dropdown menus and a list box: 'Dataset Name' (24-Oct-2015), 'Region Name' (All), 'Library Name' (Almonte), 'Collection Code' (All), 'On Shelf' (All), and 'Restrict to Format Groups' (a list box containing 'Adult Book', 'Book Fiction', 'Adult Paperback [AF]', and 'Black Heritage Collection [AF]').

- For Fiction (see sample above):
  - After you click on “**Grubby Items Refresh**” a box will pop up on the right side of the screen with boxes to identify library, area, and audience.
  - The “**Dataset Name**” will display the most recent dataset automatically.
  - At this time, no “**Regions**” are set up, so leave this box set at “**All**”.
  - Choose your library from the “**Library Name**” drop down menu.
  - Click on the “**Collection Code**” you want to work, (Adult Book, Mystery, Easy, etc.)
  - “**On Shelf**”. This shows the on shelf status of items at the time of extract. By default only items which were on shelf at the time of extract will be returned. To see all items irrespective of whether they were IN or OUT at the time of extract select “**All**”.
  - For “**Restrict to Format Groups**” click on “**Yes, restrict to titles of the same format**”.
  - Click Run.

## Grubby Items Refresh Action Plan

The action plan lists all items in the report that meet the criteria and filters set. In the example below, the item in the grey bar is the item in your library. The items immediately below the grey bar are items at other locations that are available for transfer to your location.



**Grubby Items Refresh Action Plan (Non-Fiction)**

Region: Metropolitan Library System  
 Library: Downtown  
 Description: 900.000000 - 909.999999 (General History)  
 Action: Before buying a replacement, consider refreshing with a newer copy that is Dead in another library, using the list below.

Call Number	Barcode	Title	Author	Circulation Date Added	Last Use Date	Publication Date	On Shelf	Refresh From	Extend	Transfer
909.04924 G618j	63186517	The Jewish people: their history and their religion	Goldberg, David J., Rabbi	64 09-Mar-1988	28-Jan-2015	1987	Yes		0	
909.04924 G618j 1989	73023817			2 08-May-2008	25-Nov-2014	1989	Yes	Northwest		

Showing page 1 of 18

- To aid in viewing the report, Go to the top of the page and click on the drop down menu next to **“Layout Options”** and click on **“Use this One...”**. This will give you a predetermined layout that excludes some extraneous information. You can click on the arrow at the left side of the page to see what other columns are available. If you’d like to add these columns back to your report, you can drag and drop them to where you want them.
- You can sort the data in the columns, for example you can sort call numbers in order, or other criteria in order (such as oldest date) by clicking on the header of each column.
- To print out a list to take to the shelves, use the PDF command at the upper left above the report. (CollectionHQ can be used on the iPads each library owns. To access through the iPad, go to Safari, and type [collectionhq.com](http://collectionhq.com) in the search line. You’ll be taken to the webpage where you can log in to the program)
- Each title entry shows basic information about the item including call number, circulations, etc.
- For each item there is a column marked **“Extend”**. If you have an item that indicates it has circulations over the target amount, but is still in good condition, you can extend the number of circulations so it doesn’t show up on a Grubby Items Refresh list until it reaches that new threshold.

Grubby Items Refresh Action Plan (Non-Fiction)

Region Metropolitan Library System  
 Library Downtown  
 Description 900.000000 - 909.999999 (General History)  
 Action: Before buying a replacement, consider refreshing with a newer copy that is Dead in another library, using the list below.

Call Number	Barcode	Title	Author	Circulation Date Added	Last Use Date	Publication Date	On Shelf	Refresh From	Extend	Transfer
* 909.04924 G618j	63186517	The Jewish people: their history and their religion	Goldberg, David J., Rabbi	64 09-Mar-1988	28-Jan-2015	1987	Yes			10
909.04924 G618j 1989	73023817			2 08-May-2008	25-Nov-2014	1989	Yes	Northwest		<input type="checkbox"/>

Showing page 1 of 18

- Immediately below an item there will be at least one listing for an item that is available for transfer to your library. Titles offered for transfer will only include titles from another library if they are dead (no longer in use) and in reasonably good condition at that library, and only if they are “available”. Available means that no other user has selected the item for transfer to another library. If a no-entry sign is displayed, someone else has reserved the item for transfer.
- If you want this item transferred to you, click in the check box under the “**Transfer**” column. This will add the title to a Transfer list (see more info below).

Grubby Items Refresh Action Plan (Non-Fiction)

Region Metropolitan Library System  
 Library Downtown  
 Description 900.000000 - 909.999999 (General History)  
 Action: Before buying a replacement, consider refreshing with a newer copy that is Dead in another library, using the list below.

Call Number	Barcode	Title	Author	Circulation Date Added	Last Use Date	Publication Date	On Shelf	Refresh From	Extend	Transfer
* 909.04924 G618j	63186517	The Jewish people: their history and their religion	Goldberg, David J., Rabbi	64 09-Mar-1988	28-Jan-2015	1987	Yes			0
909.04924 G618j 1989	73023817			2 08-May-2008	25-Nov-2014	1989	Yes	Northwest		<input checked="" type="checkbox"/>

Showing page 1 of 18

## Transfer Lists

Once you have completed the **Grubby Items Refresh** report, you need to get copies of the items you marked under the Transfer column. The **Transfer List** displays an action plan containing all items that have been selected for transfer through the **Grubby Items Refresh** tool, as well as other refreshing tools i.e., Popular Subjects Refresh, etc..

At Metropolitan Library System, we are bypassing a couple of the preprogrammed steps CollectionHQ provides when it comes to Transfer Lists. Following are procedures for obtaining and processing Transfers.

- Click on the drop down menu next to “**Collection Action**” in the box on the left side of the screen.
- Click on “**Transfer List**”.

## Non-Fiction Transfer Lists

MANAGE Non-Fiction

Transfer List - A Branch Action Plan which identifies items that may be transferred as a result of using the Transfer Tools, Popular Subject Transfer, Grubby Items Refresh and Floating Pull/Push Tools

Collection Maintenance  
Collection Demand  
Collection Refresh  
Collection Removal  
Floating Reference  
Collection Action

Swap List  
Transfer List

Dataset Name: 24-Oct-2015  
From Library: All  
To Library: All  
Audience: Adult  
Class Range From: 000.000000 (Theory of Knowledge)  
Class Range To: 999.999999 (History of Other Areas)  
Category Filter: All  
Non-Fiction Collection Code: All  
Condensed Report: No  
Transfer Reason: All

RFID Run

For Nonfiction (see above example):

- To find out what titles/items were marked for transfer in the **Grubby Items Refresh** report, click “**All**” in the “**From Library**” box and your library name in the “**To Library**” box.
- You can designate a portion of the collection by clicking on the “**Class Range From**” and “**Class Range To**” boxes. This will bring up the list that you generated.
- “**Nonfiction Collection Code**”. The collection code that is assigned to this non-fiction collection in your ILS. Please note: the Action Plan will only display results that are applicable to the selected Non-Fiction Collection Code and that fall within the selected Audience group and other selected parameters. (ANF, JNF, YNF, BHC, etc.)
- “**Condensed Report**”. Select whether the results should be condensed when printed or whether the results for each library branch appear on separate printed pages.
- “**Transfer Reason**” - Select a transfer type to narrow the results in the action plan. Usually, you’ll be working from a **Grubby Items Refresh** report. Leave this on “**All**” in case other reports were used.
- Click Run

## Fiction Transfer Lists

The screenshot shows the collectionHQ web application. The top navigation bar includes links for Select, Manage, Promote, and Evaluate. The main header features the collectionHQ logo and a 'MANAGE Fiction' section. Below this, a sidebar lists various collection management tasks: Collection Maintenance, Collection Demand, Collection Refresh, Collection Removal, Floating Rebalance, and Collection Action. The 'Transfer List' form is displayed, containing several dropdown menus and checkboxes. The form fields are: Dataset Name (24-Oct-2015), From Library (All), To Library (All), Collection Code (All), Condensed Report (No), and Transfer Reason (All). There are 'RFID' and 'Run' buttons at the bottom of the form.

For Fiction:

- To find out what titles/items were marked for transfer in the **Grubby Items Refresh** report, click “**All**” in the “**From Library**” box and your library name in the “**To Library**” box.
- “**Collection Code**”. The collection code that is assigned to this non-fiction collection in your ILS. Please note: the Action Plan will only display results that are applicable to the selected Non-Fiction Collection Code and that fall within the selected Audience group and other selected parameters. (Adult Book, Mystery, Large Print, Easy, etc.)
- “**Condensed Report**”. Select whether the results should be condensed when printed or whether the results for each library branch appear on separate printed pages.
- “**Transfer Reason**” - Select a transfer type to narrow the results in the action plan. Usually, you’ll be working from a **Grubby Items Refresh** report. Leave this on “**All**” in case other reports were used.
- Click Run

## Transfer List Action Plan

collectionHQ  
data insight solutions

Welcome to collectionHQ, Kay Academy | Administration | Log Out

Layout: Default View | Layout Options | Default | Advanced Options | Page 1 of 1 | Go

### Transfer List Action Plan (Non-Fiction)

**Library** Warr Acres To Edmond  
**Type** Adult

Class Range	Author	Title	Class Number	ISBN	Barcode	Transfer Reason	Changes	Barcode to be Replaced	Changes	CARL Collect Code
629.200000 to 629.299999 (Cars, trucks, motorcycles)	Berardelli, Phil	Safe young drivers : a guide for parents and teens	629.283000	9780981477312	M00025414	Grubby Refresh	60862326			ANF

Showing page 1 of 1 | Go

The Transfer List Action Plan lists all the titles selected for transfer. The report shows the title of the item, Barcode of the item, Barcode of the item selected for transfer.



## Processing Transfers

- Libraries need to have a library card specifically designated for the purpose of placing holds for transfers. (Similar to the library cards used for Traces)
- The Library Card should be named using the following naming scheme: **@XXxfr** (ex. @DNxfr)
- From the **Transfer List Action Plan**, place **Item Level Holds** in **Carl-X** for each item on your list using the number in the “**Barcode**” column. Be careful not to use the number in the “**Barcode to be Replaced**” column, which is the item you own and are replacing with the transfer.
- The requested transfer item will show up on the owning library’s daily Holds report and should be processed as any other hold.
- When the item is received at the requesting library, staff need to change the location from the original library to their library.
- After the change in library location, staff need to affix a new library abbreviation label over the original library designation on the spine and on the barcode label using Arial 10 Bold font.



- Once you have processed the new transfer copy, withdraw the old grubby item through Carl-X, using normal withdrawal procedures.