SENDING ITEM FOR TRANSFER

This procedure outlines how to indicate that you want an item Transferred. You are placing the item into a Work Order for Metadata Services.

1. Using your preferred search method, navigate to the Physical Item that you want to transfer.

2. Once you have located the record, you want to place a Work Order by clicking on the ellipses and choosing Work Order.

3. In the Place Items in Process screen:

   Process Type: Transfers

   If you have the item in hand, Do not pick from shelf should be CHECKED
   If the item needs to be retrieved, Do not pick from shelf should be UNCHECKED

   Note: transfer to [LIBRARY/LOCATION]; include any other special instructions; indicate whether you are sending the item to us or not
   IF YOU DO NOT INCLUDE INSTRUCTIONS WE WILL NOT BE ABLE TO COMPLETE THE TRANSFER

   Managing department = Metadata Services – Transfers

4. Click on Submit.

   You will be returned to the List of Items.
   The item you selected for the Work Order will now appear with
   Status = Item not in place
   Process type = Transfers

5. The item now needs to be sent to Metadata Services (rm.464) in Van Pelt for final processing unless you have indicated otherwise in step 3.

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