Moving Collections
Globally Moving Items from One Circulation Location or Catalog to Another
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Overview: This document will go over the steps for globally moving items from one location or catalog to another with the following examples:

1. Any catalog: Moving all items from one circulation location to another within a single catalog.
2. Union catalog: Moving a majority of a location’s items to another catalog in a union catalog.
3. Union catalog: Moving selected items to another catalog in a union catalog.

Detailed information on these steps can be found at the Knowledge Center:

http://cybertoolsforlibraries.com/library/library.php#CIRC 8. Item Location Class Status Global Editor

Please Note: Mistakes with function [Location Class Status Global Editor] are very difficult to undo. After running Location Class Status Global Editor, use Reports->Location Inventory to see if you missed any due to Circulation Class and/or Status differences. When running this report, be sure to include Display Item Fields->Item Circulation Class. Typically you have to run the Location Class Status Global Editor a few times in order to move all of the combinations.

1. Any catalog: Moving all items from one circulation location to another within a single catalog.

Please Note: Moving just one or a few items can be easily accomplished via function [Item Edit].

Go to Properties->Circulation Locations and note the Circulation Class and Status established for the location from which the items are to be moved:
Note that the Default Circulation Class for the Consumer Health Location is “TWO WEEKS” and the Default Circulation Status is “AVAILABLE”.

Look at the Circulation Location where you want the items to be moved and note the same:

Now go to Circulation->Location Status Global Editor

You can change the “To Class’ and the “To status”. Use function [Update Item(s)] to move all items from location Consumer Health to GENERAL COLLECTION.
2. Union catalog: Moving a majority of a location’s items to another catalog in a union catalog.

2a. Remove the unwanted items from the location via function [Item Edit]. Either delete items from the catalog or change the item’s circulation location. See Reports->Location Inventory for a list of items located in each circulation location. Make sure all of the items you want to move have been returned in the system.

2b. If necessary create a circulation location in the final catalog that corresponds with the name of the circulation location found in the originating catalog. Note the CLASS and STATUS used to create the location. For more information on adding new locations, please see:

http://cybertoolsforlibraries.com/library/library.php#PROP
14. How Do I Add a New Location to My Catalog?

2c. In the originating catalog use Circulation->Location Class Status Global Editor to move all of the remaining items in the originating catalog circulation location to the target circulation location.

For Example:

From Catalog (Originating Catalog): Patient Resource Library – Cancer Center
To Catalog (Final Catalog): Tremaine Library

Change from location=General Collection
To location=PRL General Collection

Change from class=Four Weeks
To class=Four Weeks (or any reasonable selection, e.g., Two Weeks)

Change from status=AVAILABLE
To status=AVAILABLE (or any reasonable selection, e.g. NON-CIRCULATING)

Select function [Update Item(s)]. Review Reports->Location Inventory for the Change from location to see if you missed any items due to Circulation Class and/or Status differences.
3. **Union catalog: Moving selected items to another catalog in a union catalog.**

3a. In the originating catalog’s Staff Functions, go to Properties->Circulation Location and create a new location. For example, create a location called: “MOVE”. Note the CLASS and STATUS used to create the “MOVE” location.

3b. Go to Circulation->Item Edit for each item on your list and change the circulation location to the new location "MOVE”. Make sure they have the same STATUS and CLASS that you used when creating the new location "MOVE”.

3c. If necessary in the final catalog’s Staff Functions, go to Properties->Circulation Location and create a new location to which the items in the originating catalog’s “MOVE” circulation location will be moved. For example, create a new location in the final catalog called: “Wellness”. Or, use a pre-existing location.

3d. In the originating catalog go to Circulation->Location Class Status Global Editor to move all of the items in the originating catalog circulation location “MOVE” to the target location in the final catalog.

**For Example:**

![Location Class Status Global Editor](image)

From Catalog (Originating Catalog): Patient Resource Library – Cancer Center
To Catalog (Final Catalog): Tremaine Library

- Change from location=MOVE (Patient Resource Library – Cancer Center)
- To location=Wellness (Tremaine Library)

- Change from class=One Week
- To class=Three Weeks

- Change from status=AVAILABLE
- To status=AVAILABLE

Select function [Update Item(s)]. Review Reports->Location Inventory for the Change from location to see if you missed any items due to Circulation Class and/or Status differences.