

# Inventory: Item records

Item records usually represent one physical, circulate-able unit. The item record is where the barcode, material type, loan type, and current item status are stored.

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## Guide to local field usage in item records (pdf)

## Create a New Item Record

Preconditions: Existing Instance and Holdings Record in Inventory

### Steps

1. Navigate to the desired Instance record in Inventory; the selected record will be displayed in the right pane
2. Choose the appropriate Holdings record and select "Add Item"
3. Fill in required and other relevant fields
  - a. Required: Material type (in *Item data* section), Permanent Loan Type (in *Loan and availability* section)
4. Select "Save and close" in the lower right

### Expected Result:

New item displays with the associated Holdings in the right pane

100 essays I don't have time to write : on umbrellas and sword fights, parades and dogs, fire alarms, children, and theater / Sarah Ruhl, 1974-  
Holdings: Olin - PS3618.U48 A6 2014

**Item record**

**Collapse all**

Select material type  
3-dimensional Object  
Archival Manuscript  
Archivum  
Audio  
BD MATERIAL  
Book  
Computer File  
dvd  
electronic resource  
Equipment  
Equipment - peripheral, small electronic  
Equipment - special digital  
Equipment - supplies, utility, recreation  
Keys  
Laptop  
Locker  
Map  
microform  
Music  
Select material type  
Please select to continue

Accession number

Item identifier

Copy number

**Inventory** **Actions** **Instance record 100 essays I don't have time to write : on um...** **Actions**

**Title** **Contributors**

100 essays I don't have time to write : on umbrellas and sword fights, parades and dogs, fire alarms, children, and theater / Sarah Ruhl. Ruhl, Sarah, 1974-  
100 essays I don't have time to write : on umbrellas and sword fights, parades and dogs, fire alarms, children, and theater / Sarah Ruhl. Ruhl, Sarah, 1974-  
36 insecticides used on or around dogs and cats / prepared by Diana Post and Jackson Schreiber. Post, Diana ; Schreiber, Jackson ; Rachel Carson Council.

**Holdings: Olin - PS3618.U48 A6 2014** **View holdings** **Add item**

Item barcode	Status	Copy number	Loan type
052420082020	Available	1	Circulating

**Add holdings**

**Administrative data**

**Condition**

Number of missing pieces

Missing pieces

Date

Item damaged status

Date

**Item notes**

**Loan and availability**

Permanent loan type \*

Reserves

Temporary loan type

Select loan type

**Cancel** **Save and close**

<https://comet-training.foliosoft.com/inventory/Items+R...>

Instance record ☐ unspecified

100 essays I don't have time to write : on umbrellas and sword fights, parades and dogs, fire alarms, children, and theater / Sarah Ruhl.

Holdings: Olin > PS3618.U48 A6 2014 [View holdings](#) [Add item](#)

Item: barcode ^	Status	Copy number
31924120952852	Available	1
No barcode	Available	-

[Add holdings](#)

## Edit an Existing Item Record

### Steps

1. View the item record by clicking on the barcode field (either the barcode itself or the text "no barcode")
2. From the Actions menu in the upper right, select "Edit"
3. Make desired changes
4. As soon as you make any changes to the item, the "Save and close" button in the lower right corner will become active. Select "Save and close" to save your changes.

Holdings: Olin (Annex) > Film 1297 reel 966, no. 50 [View holdings](#) [Add item](#)

Item: barcode ^	Status	Copy number
No barcode	Available	1

[Add holdings](#)

Item record Available [Actions](#)

ance: A New song of an orange, to that excellent old tune of A pudding, &c. [microform]. (s.n.), 1688  
Holdings: Olin (Annex) > Film 1297 reel 966, no. 50

r string  
no.50 1

[Edit](#)  
[Duplicate](#)  
[Delete](#)  
[Mark as missing](#)  
[New Request](#)

A New song of an orange, to that excellent old tune of A pudding, &c. [microform]. (s.n.), 1688  
Holdings: Olin (Annex) > Film 1297 reel 966, no. 50

Item record

Effective location for item  
Olin (Annex)

Effective call number string  
Bound with: reel 966-no.50 1

[Collapse all](#)

Administrative data

Record last updated: 6/26/2022 5:07 PM

☐ Suppress from discovery

Item HRID Barcode Accession number Item Identifier

12067883 00

[Add former identifier](#)

[Add statistical code](#)

[Cancel](#) [Save and close](#)

## Delete an Item Record

Items with some statuses (such as checked out) cannot be deleted. FOLIO will display an error message (as illustrated) and will not allow the deletion.

If an item has no dependencies (i.e., relationships to other records), it is easily deleted.

**Item records must first be suppressed before they are deleted. (This ensures the change occurs correctly in the public catalog.) Before following the steps below, suppress the item and either wait a minute or two.**

### Steps

1. View the item record by clicking on the barcode field (either the barcode itself or the text "no barcode")
2. From the Actions menu in the upper right, select "Delete"
3. Select "Delete" again to confirm the deletion

Confirm deletion of item

Item HRID 10067883 with barcode 00 is checked out and can not be deleted until checked in again, and item status is 'Available'

[Back](#)

[Actions](#)

[Edit](#)  
[Duplicate](#)  
[Delete](#)  
[Mark as missing](#)  
[New Request](#)

Confirm deletion of item

Item HRID 10067883, barcode xx has no dependencies and will be deleted.

Cancel

Delete

## Reorder Item Records

As of Iris release there is no way to change the default/stored order of item records within a holdings record. You can, however, change the display order temporarily by sorting.

Sort by the values in any displayed column by clicking on the column header.

For example, sort by status, click on the word "Status"

Future functionality (manually changed the order items are stored) is described in <https://issues.folio.org/browse/UXPROD-1625>

Default display:

Instance record   unspecified

Nevada Historical Society quarterly.

Holdings: Olin > F836.N49 N4

View holdings   Add item

Item: barcode ^	Status	Copy number	Loan type	Effective location	Enumeration	Chronology
31924062079146	Available	1	Circulating	Olin	v.32-33	1989-1990
31924062078898	Available	1	Circulating	Olin	v.7-8	1964-1965
31924062078906	Available	1	Circulating	Olin	v.16-18	1973-1975
31924062078914	Available	1	Circulating	Olin	v.26-27	1983-1984
31924062078971	Available	1	Circulating	Olin	v.5-6	1962-1963
31924062078989	Available	1	Circulating	Olin	v.13-15	1970-1972
31924062078997	Available	1	Circulating	Olin	v.24-25	1981-1982
31924062079052	Available	1	Circulating	Olin	v.3-4	1960-1961
31924062079060	Available	1	Circulating	Olin	v.11-12	1968-1969
31924062079078	Available	1	Circulating	Olin	v.22-23	1979-1980

Sorted by Enumeration (still not quite right):

Instance record   unspecified

Nevada Historical Society quarterly.

Holdings: Olin > F836.N49 N4

View holdings   Add item

Item: barcode	Status	Copy number	Loan type	Effective location	Enumeration ▾	Chronology
31924062079144	Available	1	Circulating	Olin	v.9-10	1960-1967
31924062078898	Available	1	Circulating	Olin	v.7-8	1964-1965
31924125621676	Available	1	Circulating	Olin	v.57-60	2014-2017
31924107371852	Available	1	Circulating	Olin	v.54-56	2011-2013
31924115041395	Available	1	Circulating	Olin	v.52-53	2009-2010 incomplete
31924062078971	Available	1	Circulating	Olin	v.5-6	1962-1963
31924105030195	Available	1	Circulating	Olin	v.48-49	2005-2006
31924099920575	Available	1	Circulating	Olin	v.46-47	2003-2004

Sorted by Chronology:

Instance record   unspecified

Nevada Historical Society quarterly.

Holdings: Olin > F836.N49 N4

View holdings   Add item

Item: barcode	Status	Copy number	Loan type	Effective location	Enumeration	Chronology ^
31924062079052	Available	1	Circulating	Olin	v.3-4	1960-1961
31924062078971	Available	1	Circulating	Olin	v.5-6	1962-1963
31924062078998	Available	1	Circulating	Olin	v.7-8	1964-1965
31924062079144	Available	1	Circulating	Olin	v.9-10	1966-1967
31924062079060	Available	1	Circulating	Olin	v.11-12	1968-1969
31924062078989	Available	1	Circulating	Olin	v.13-15	1970-1972
31924062078906	Available	1	Circulating	Olin	v.16-18	1973-1975
31924062079151	Available	1	Circulating	Olin	v.19-21	1976-1978
31924062079078	Available	1	Circulating	Olin	v.22-23	1979-1980
31924062078997	Available	1	Circulating	Olin	v.24-25	1981-1982

## Move (Relink) Item Records from One Holdings Record to Another

Preconditions: Holdings and Item records already exist in Inventory

### Move Items Within the same Instance

Preconditions: Instance record exists with more than one associated Holdings record

#### Steps:

1. Navigate to the Instance record
2. In the "Actions" menu in the upper right, select "Move items within an instance"
3. The display will change, with check boxes appearing to the left of each item (the Holdings accordion needs to be expanded)
4. Select the item(s) you wish to move
5. Select "Move to" and then select the Holdings record **OR**
6. Drag and drop the item(s) you have selected

Instance record 101 essays I don't have time to write : on umbrellas and sword fights, p... Faber & Faber, 2014

Actions

Edit

Duplicate

Move items within an instance

Move holdings/items to another instance

View requests (0)

Instance record   unspecified

101 essays I don't have time to write : on umbrellas and sword fights and theater / Sarah Ruhl.

Holdings: Olin > prefix2 call number2 suffix2

View holdings   Add item

Item: barcode ^	Status	Copy number	Loan type	Effective location
barcode3	Available	-	Non-circulating	Olin
Item2move	Available	-	Circulating	Olin

Holdings: Olin Reference > prefix call number suffix

View holdings   Add item

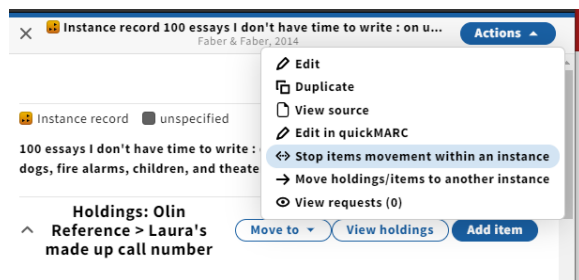
Item: barcode ^	Status	Copy number	Loan type	Effective location
barcode1	Available	-	Non-circulating	Olin Reference

Add holdings

## Expected results:

Item record displays with the Holdings to which it has moved; its effective location and call number reflect that holdings

Note: Once you have activated the ability to move items, an additional option will appear in the Actions menu—Stop items movement within an instance. This will change the display back to the usual view, but will not undo any item movement you have initiated.

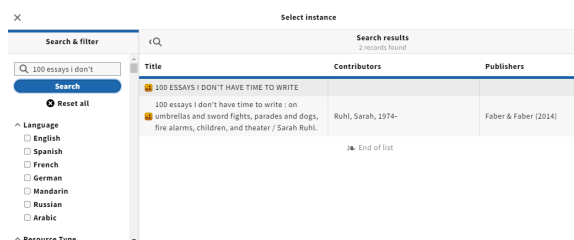
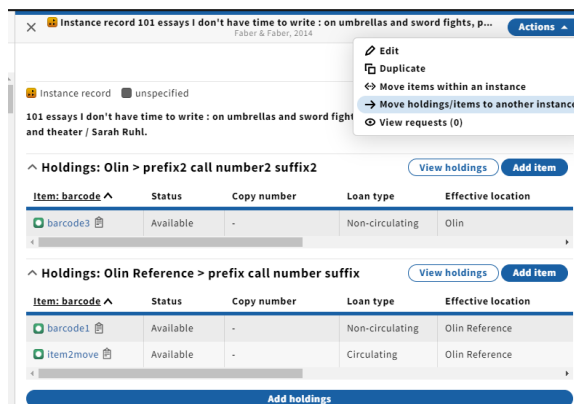
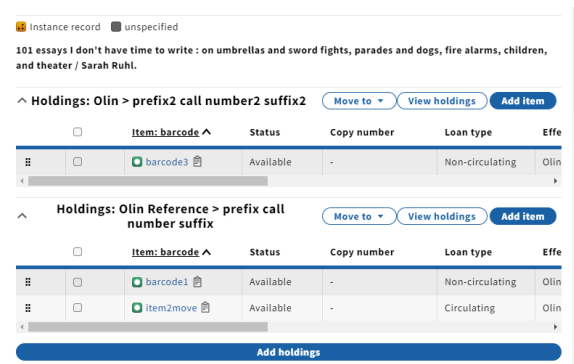
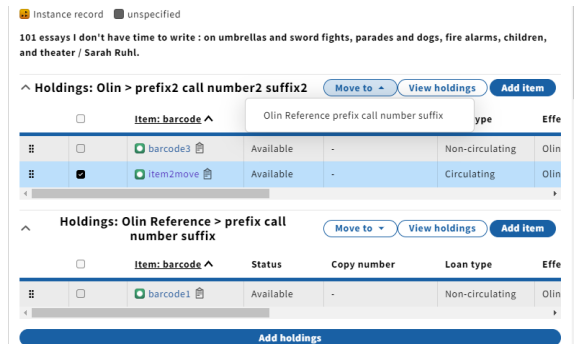
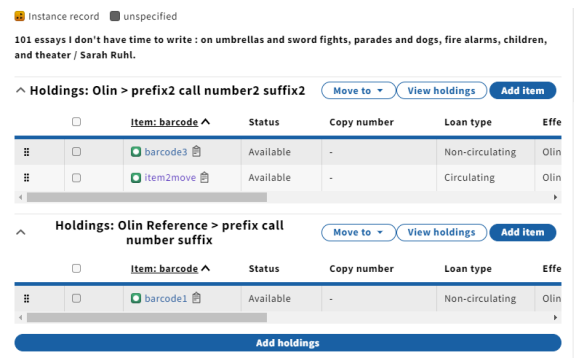


## Move Items between two different Instance records

Preconditions: a Holdings record exists on the Instance the Items will be moved to

### Steps:

1. Navigate to the Instance record with the Item(s) you wish to move
2. In the "Actions" menu in the upper right, select "Move holdings /items to another instance"
3. A search dialog box opens; the search menu has the same options as the regular Inventory search. (For example, you can search by hrid or by barcode)
4. Search for and select the Instance record you wish to move Item(s) to
5. The records will display side-by-side with checkboxes enabled
6. Select the Item record(s) to be moved; to select all items associated with a Holdings record choose the box just above the blue line, next to the text "Item: barcode"
7. Select "Move to" and then select the desired Holdings record **OR**
8. Drag and drop the Item record(s) over to the desired Holdings record
9. Check the confirmation message to make sure you've selected the correct record
10. Click "Continue"
11. A green success "toast" will appear briefly



## Expected results:

Item(s) that have been moved will display with the Holdings record(s) to which they have been moved, along with the associated effective location and call number. They will no longer display with the Holdings record from which they were removed.

The screenshot shows a library system interface with two tabs. The left tab, titled 'Holdings: Olin > prefix call number2 suffix2', displays a table of holdings. The right tab, titled 'Holdings: Olin Reference > Laura's made up call number', displays a table of holdings. A 'Confirm move' dialog box is open, showing the item being moved from the left tab to the right tab. The dialog box contains the text '1 item will be moved to Olin Reference Laura's made up call number' and buttons for 'Cancel' and 'Continue'.

**Holdings: Olin > prefix call number2 suffix2**

Item barcode	Status	Copy number	Loan type	Eff
barcode1	Available	-	Non-circulating	Olin
Item2move	Available	-	Circulating	Olin

**Holdings: Olin Reference > Laura's made up call number**

Item barcode	Status	Copy number	Loan type	Eff
barcode2	Available	-	Circulating	Olin
Item2move	Available	-	Circulating	Olin
No barcode	Available	-	Reserves	Olin

**Confirm move**

1 item will be moved to Olin Reference Laura's made up call number

[Cancel](#) [Continue](#)

## Item Statuses

Many item statuses are assigned by FOLIO based on specific actions and cannot be assigned or changed manually through the user interface. For example, an item with status Checked out must be checked in for the status to change.

All possible item status values (comprehensive list - we may not be using all of these):

The screenshot shows a dropdown menu with the following item statuses:

- Aged to lost
- Available
- Awaiting delivery
- Awaiting pickup
- Checked out
- Claimed returned

Aged to lost  
Available  
Awaiting delivery  
Awaiting pickup  
Checked out  
Claimed returned  
Declared lost  
In process  
In process (non-requestable)  
In transit  
Intellectual item  
Long missing  
Lost and paid  
Missing  
On order  
Order closed  
Paged  
Restricted  
Unavailable  
Unknown  
Withdrawn

More information about item status can be found on the [FOLIO wiki](#)

Declared lost	+	▲
In process	+	
In process (non-requestable)	+	
In transit	+	
Intellectual item	+	
Long missing	+	▼

Lost and paid	+	▲
Missing	+	
On order	+	
Order closed	+	
Paged	+	
Restricted	+	▼

Unavailable	+	
Unknown	+	
Withdrawn	+	▼