Inventory

Purpose: Inventory is the FOLIO app where bibliographic information from a variety sources can be presented in a uniform, abstracted form for management of the collection regardless of the format or content rules used to describe a resource. It is a sort of staff discovery layer, useful for search and identification. As such, Inventory represents bibliographic, holdings, and item data and integrates with apps like Order, Check in, Check out, and Request. Inventory exists primarily to manage collections (physical and/or virtual). Some types of records for library resources may also be managed in other FOLIO apps or outside of FOLIO.

Inventory comprises four record types: Instance, Holdings, Item, and Container. (Container is not yet implemented as of December 2019)

Instance records may be derived from full bibliographic records (in MARC or other formats) and are intended to provide enough information for library staff to identify & select records in order to perform work on associated holdings and items. Instance records can also be in the native FOLIO format when full bibliographic description is not required.

Holdings records provide information needed, such as location, call number, and volumes owned, for staff to locate and manage library holdings. Holdings records may describe library holdings that are physical, electronic, or other formats. Holdings records are created and edited in Inventory.

An Item record provides the information needed to identify and track a single item or piece, such as barcode, availability, and material type. Item records are created and edited in Inventory.

Container records (not yet implemented as of 3/27/2020) will hold multiple Instance, Holdings, and/or Item records and serve as virtual containers, a way to represent an additional level of hierarchy and associate data that may not have bibliographic associations (such as membership plans or standing orders). Containers help staff manage materials that may be acquired, paid for, or managed in one way but described in another.

While Inventory stores bibliographic data, it is not a cataloging module. Inventory is essentially a hub, bridging the gap between other functions (such as circulation or acquisitions) and catalog data. Holdings and items data for patron-facing discovery will come from Inventory, but bibliographic data for discovery will usually come from a richer source record (such as a MARC record).

Areas of Focus

- Permissions
- UX/UI
- Searching
- Functional Processes
- Item State in FOLIO
- Reporting
- Integrations
- Considerations for Implementation
- Glossary

Inventory  Storage  MARCCat diagram courtesy of Charlotte Whitt