Required role: **Physical Inventory Operator**

This procedure outlines how to:
- **ADD multiple physical items** to an Existing Holding. The item is created on an existing bibliographic and holding record. You can only add an item to a holding for a library you are authorized for

Ensure that you have selected your “physically at” location.

Perform a search for the title using your preferred method.

On your results screen:

FIRST TIME ONLY: click on the arrow next to Expand and select Physical. This will allow you to quickly see all the holdings associated with a title.

If there are **multiple holdings**, go to MULTIPLE HOLDINGS.
If there is **one holding with items**, go ONE HOLDINGS WITH ITEMS.
If there is **one holding with NO items**, go ONE HOLDINGS NO ITEMS.
MULTIPLE HOLDINGS (with and without items)

Click on Holdings.

Locate the Holdings record for YOUR library. Click on the ellipsis next to your holding, and select View Items. You will get a list of items; if there are no items associated, this will be blank. This is ok.

Continue with instructions for Adding Items.
Click on Items. You will get a list of items.

Continue with instructions for Adding Items.
ONE HOLDING with NO items

Click on Holdings.

You will go to the Record View for the Holding Record. Click Edit.

The MD Editor will open. Ignore any “warnings”. Click on the Add Item icon.

The Physical Item Editor will open.

Continue with instructions for Adding Items.
Adding items

Remember, you can only add items to a holding in the location that you have permissions for.

Click on the arrow next to Actions and select Add Item. If the Actions choice is not appearing confirm that you have selected a “physically at” location. If you have and the Actions choice is still not appearing, then you do not have permissions for the holdings location. See your supervisor.

The Physical Item Editor screen will open.

You will need to add the following information:

BARCODE
MATERIAL TYPE
ENUMERATION A
ENUMERATION B
CHRONOLOGY I
DESCRIPTION (use generate and edit as instructed)
Inventory Number Information – do not use.  
Location information is already filled in.  
Temporary Location Information – use if required.

Material Type and Item Policy are determined by your library.  
For Enumeration, chronology and description, refer to the attached document: Item records.

Click Save.

**ERRORS**

If you create an item record in error, refer to the procedure SENDING ITEM FOR WITHDRAWAL.  
https://guides.library.upenn.edu/ld.php?content_id=36328553

YOU MUST INCLUDE A NOTE IN THE W/O OR THE W/O WILL BE RETURNED TO YOU.