

Serials Receiving in FOLIO (LTS Procedure #129)

Scope: This document outlines the process of checking in a serial in FOLIO.

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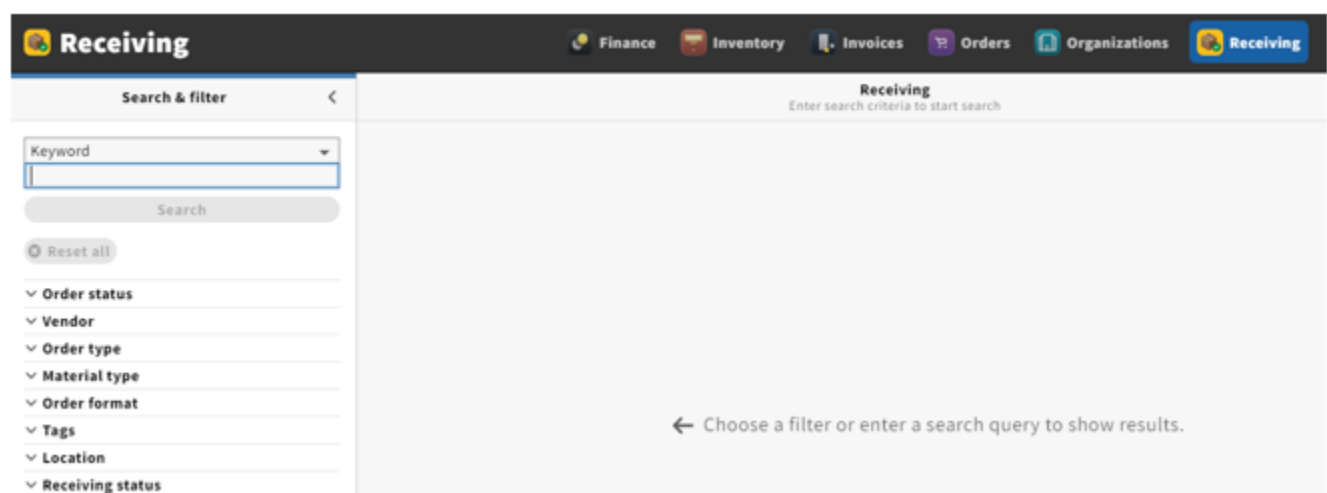
Unit: Serials Management

Date last reviewed: 21 Feb 2024

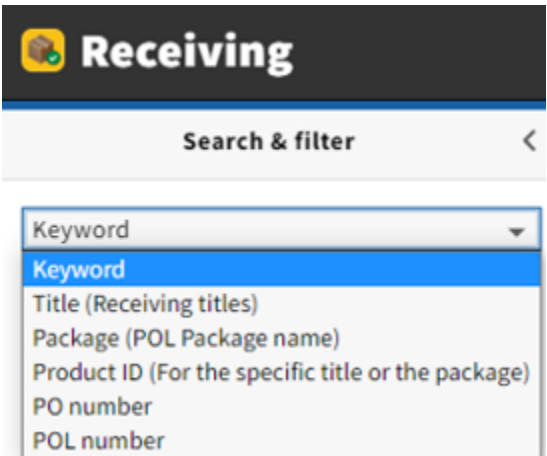
Date of next review: 21 Feb 2025

Searching for and selecting a serial to check-in

1. Begin in the **Receiving** app



2. Search by title, ISSN, PO number or HRID using the **Keyword** search function, which is generally the easiest search method as it includes all options following it in the drop-down menu



3. After searching and locating the title you are checking in, click on the title from the larger panel. If several locations appear, choose the line with the appropriate location. A third panel to the right-hand side of the screen will appear.

Receiving

FinanceInventoryInvoicesOrdersOrganizationsReceivingSettings

Sea...<NewMother Jones.259274-1Edit

Keywc<mother jcSearchReset allOrder statusVendorOrder typeMaterial typeOrder formatTagsLocationReceiving statusAcquisition units

Title	Expected receipt date	Package	POL number	Receiving note	Location
Mother Jones.	-	-	220718-1	-	Law
Mother Jones.	-	-	259274-1	-	Olun
End of list					

Title informationPOL detailsPOL number259274-1Expected receipt date2021-04-02Receiving noteVendorEBSCOMaterial supplierExpectedReceiveAdd pieceCaptionPiece formatv.46, no.3 (2021 May/Jun.)Physicalv.46, no.4 (2021 July/Aug.)Physicalv.46, no. 5 (2021 Sept./Oct.)PhysicalReceivedUnreceive

Here relevant check-in information is displayed, particularly the **Receiving note**, where the most relevant information in terms of check-in is shown (i.e. location, call number, check-in notes).

Mother Jones.259274-1Edit

Mother Jones.

Title informationPOL detailsPOL number259274-1Expected receipt dateExpected receipt dateReceiving noteolun AP2 M91 + ci:Per Rm Freq.=6x/yrOrder typeOngoingVendorEBSCOMaterial supplierRequesterReceiving workflowIndependent order and receipt quantityRush

ExpectedThe list contains no itemsActions

ReceivedFilterActionsBarcodeCaptionCopy numberEnume

Receiving an Issue

1. Click **Actions** followed by **Add piece** in the Expected field of the third panel.

Beijing review.

▼ Title information

^ POL details

POL number	Expected receipt date	Receiving note	Order type
1ABL7092-1	-		

Actions

- + Add piece
- Show columns
 - ☒ Caption
 - ☒ Copy number
 - ☒ Enumeration
 - ☒ Chronology
 - ☒ Comment
 - ☒ Piece format
 - ☒ Expected receipt date
 - ☒ Request

Vendor	Material supplied
EBSCO	-

Requester	Receiving workflow
-	Independent order and receipt quality

Expected **Actions** ^

The list contains no items

^ Received

Filter

Actions ▼

Barcode	Caption	Copy number	Enumeration
---------	---------	-------------	-------------

2. The **Edit piece** box will pop up. Enter the enumeration/chronology of the issue you are receiving. Click **Quick receive**.

Caption	Piece format *
v.46, no. 3 (2021 May-Jun)	Physical
Expected receipt date	Comment
2021-04-02	
Select location	Supplement
Olin (olin)	<input checked="" type="checkbox"/>
Assign a different location	
Cancel	Quick receive Save & close

The issue will then appear in the **Received** field:

×

Mother Jones.
259274-1

Edit

POL number	expected receipt date	receiving note	order type
259274-1	2021-04-02	olin AP2 M91 + cl:Per Rm	Ongoing

Vendor

EBSCO

Material supplier

-

Expected

Receive Add piece

Caption	Piece format	Expected receipt
v.46, no. 6 (2021 Nov-Dec)	Physical	2021-04-02
v.46, no. 5 (2021 Sept-Oct)	Physical	2021-04-02
v.46, no. 4 (2021 Jul-Aug)	Physical	2021-04-02
v.47, no. 1 (2022 Jan-Feb)	Physical	2022-03-01

Received

Unreceive

Barcode	Caption	Piece format	R
-	v.46, no. 3 (2021 May-Jun)	Physical	20

NOTE: An alternative to entering the enumeration/chronology manually would be to click on a previously received issue (in the **Received** field), copy the **Caption** information, and click **Cancel**. Then under **Expected**, click Actions, **Add piece**, paste into the **Caption** field, edit as needed and click **Quick receive**.

Adding an issue to the holdings receipt history in Inventory

- As of February 2024, there is no direct connection between the **Receiving** and **Inventory** apps. In order for issues to be publicly displayed in Blacklight and discoverable by patrons, they must also be added to the **Receiving history** in the holdings record through the **Inventory** app.
- Navigate to the **Instance** record in Inventory by right-clicking the title at the top of the record in the **Receiving** app and opening the link in a new tab. This will make copying the enumeration and chronology easier later on.

×

Mother Jones.
259274-1

Mother Jones

▼ Title info

Open link in new tab

Open link in new window

Open link in incognito window

^ POL details

POL number

259274-1

Vendor

EBSCO

Receiving n

olin AP2 M91

Expected

Caption	Piece format	Expected receipt
v.46, no. 6 (2021 Nov-Dec)	Physical	2021-04-02
v.46, no. 5 (2021 Sept-Oct)	Physical	2021-04-02
v.46, no. 4 (2021 Jul-Aug)	Physical	2021-04-02
v.47, no. 1 (2022 Jan-Feb)	Physical	2022-03-01

Received

Barcode	Caption	Piece format	R
-	v.46, no. 3 (2021 May-Jun)	Physical	2

3. Opening the link will bring you to the **Instance** record in the **Inventory** app. Find the holdings related to the appropriate location. Click on **View holdings**.

ance

Inventory

Invoices

Orders

Organizations

Receiving

Settings

Instance record Mother Jones. Foundation for National Progress]

Actions

Collapse all

Instance record

unspecified

Mother Jones.

Holdings: Olin > Oversize AP2 .M91 +

View holdings

Add item

Item: barcode ^	Status	Copy number	Loan type	Effective location
31924050397789	Available	1	Circulating	Olin
31924052424847	Available	1	Circulating	Olin
31924052424854	Available	1	Circulating	Olin
31924052426925	Available	1	Circulating	Olin
31924057477956	Available	1	Circulating	Olin
31924057477964	Available	1	Circulating	Olin
31924057477972	Available	1	Circulating	Olin
31924057477980	Available	1	Circulating	Olin
31924057477998	Available	1	Circulating	Olin

4. Click **Actions** near the upper right-hand corner of the screen and select **Edit** from the drop-down menu.

Inventory

Finance

Inventory

Invoices

Orders

Organizations

Receiving

Settings

Holding record Olin Oversize AP2 .M91 +

Actions

Instance: Mother Jones., Foundation for National Progress]

Edit

Duplicate

Delete

Administrative data

Record last updated: 4/7/2021 8:30 AM

Holdings HRID	Source	Former holdings ID
423512	-	-

Holdings type
-

Statistical code type	Statistical code
-	-

5. Scroll to the bottom of the page. Click **Add receiving history**.

Inventory

FinanceInventoryIssuesOrdersReports

Walter Jones, Foundation for National Progress

Add holdings statement for indexes

ISS policy

Digitization policy

Retention policy

Holdings notes

Note type

Note

Staff only

Add note

Electronic access

Add electronic access

Acquisition

Acquisition method

Order format

Receipt status

Receiving history

Add receiving history

Receiving history

Add receiving history

6. Copy/paste or type caption from the Receiving app into the enumeration/chronology fields in the holdings **Receiving history**. The **Public display** toggle should be checked, since we are only adding current issues of a serial to the **Receiving history** (this is a similar function to the *Display in OPAC* column in Voyager Acquisitions).

Receiving history

Public display

Enumeration

Chronology

v.46, no. 3

2021 May-Jun

Add receiving history

Cancel

Save and close

NOTE: As of February 2024, the functionality requires us to list publicly displayed issues in ascending order by chronology and NOT the order in which issues are received. The most recent issues should be listed at the bottom.

Receiving history

Public display

Enumeration

Chronology

v. 47, no. 3 (2022 May/June)

v. 47, no. 4 (2022 July/Aug.)

v. 47, no. 5 (2022 Sept./Oct.)

Add receiving history

Remember to **Save and Close** when finished editing the record.

Consolidation of Receipt history

1. As we begin to build up a check-in history in the Receiving app, note that multiple consecutive issues can be consolidated onto one line.

Add piece

Caption

v. 47, no. 3-5 (2022 May/June-Sept./Oct.)

Copy number

Enumeration

Chronology

Piece format*

Physical

Expected receipt date

MM/DD/YYYY

Comment

Order line locations

Olin (olin)

Supplement

☐

Name (code)

Olin (olin)

Location look-up

Cancel

☐ Create another

Quick receive

Save & close

2. Multiple issues should be consolidated onto one line in the *Receiving history* in the Inventory app.

^ Receiving history

☒ Public display

Enumeration

v. 47, no. 3-5 (2022 May/June-Sept./Oct.)

Chronology

Add receiving history

Adding a completed volume to holdings

1. When all issues in a volume have been received, the *holdings statement* should be updated to include the completed volume.

- 2. To do so, make sure you're in edit mode by clicking *Actions* at the top right corner of the screen in the holdings record and select *Edit*.
- 3. Scroll to the *Holdings statement* and add the completed volume. Click *Save & close*.

Holdings statement	Holdings statement public note	Holdings statement staff note
<input type="text" value="v.1 (1976:Feb./Mar.-Aug.)"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="v.4-27 (1979-2002)"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="v.34:no.1-3,5-6 (2009:Jan./Feb.-May/June,Sept./Oct.-No"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="v.35 (2010)"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="v.42:no.3-6 (2017:May/June-Nov./Dec.)"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="v.43-46 (2018-2021)"/>	<input type="text"/>	<input type="text"/>

Add holdings statement

Add holdings statement for supplements

Cancel

Save and close

NOTE: The Holdings statement should be consolidated to as few lines as possible. Separate lines should only be created for incomplete volumes and changes in enumeration/chronology (ex. going from Arabic to Roman numerals, new series, etc.).

- 4. Once you've added the volume to the holdings statement, delete the publicly displayed issues by clicking the trashcan(s) to the right of the enum./chron. field(s). There's no need to uncheck the *Public display* box, since you're deleting the lines. Note that publicly displayed issues will only be populating this field.

Receiving history

☒ Public display

Enumeration

Chronology

Add receiving history

How to process serials to be barcoded

- 1. For individual serial issues that are barcoded (annual volumes, titles sent to the Annex, etc.), a similar process of checking in a serial applies with a few exceptions. Vols. that will be getting an item record should be checked-in in the Receiving app and added to the holdings statement in Inventory. You can skip adding the volume to the *Receiving history* in Inventory/holdings, since you'll be adding it directly to the holdings statement.

Finance Inventory Invoices Orders Organizations **Receiving** Settings

Theatre annual... A publication of information and research in the arts and history of the theatre. [Edit](#)
4ABQ1872a-1

[Collapse all](#)

Theatre annual... A publication of information and research in the arts and history of the theatre.

▼ **Title information**

^ **POL details**

POL number 4ABQ1872a-1	Expected receipt date 2021-04-27	Receiving note -	Order type Ongoing
Vendor YANKEE SERIALS	Material supplier -		

^ **Expected** [Receive](#) [Add piece](#)

Caption	Piece format	Expected receipt date	Request
v.74 (2021)	Physical	2021-04-27	- >
v.75 (2022)	Physical	2022-04-01	- >

^ **Received** [Unreceive](#)

Barcode	Caption	Piece format	Received date	Request
-	v.73 (2020)	Physical	2021-04-27	- >

2. Add the volume and year to the holdings statement in Inventory.

Finance **Inventory** Invoices Orders Organization

The Theatre annual... A publication of information and research in the arts and history of the theatre.

Copy number Call number type Call number prefix Call number Call number suffix

^ **Holdings details**

Number of items

Holdings statements

Holdings statement Holdings statement public note Holdings statement staff note [Add holdings statement](#)

3. Click *Save and close* when done. Click the X in the upper left-hand corner to exit the holdings record, which will bring you back to the Instance.

Creating an item record

1. From the Instance record, click on *Add item*.

Finance
Inventory
Invoices
Orders
Organizations
Receiving
Settings

X Instance record The Theatre annual... A publication of information and research in the a... Actions

Collapse all

Instance record unspecified

The Theatre annual... A publication of information and research in the arts and history of the theatre.

^ Holdings: Olin > PN2012 .T37 View holdings Add item

Item: barcode ^	Status	Copy number	Loan type	Effective location
31924077366411	Available	1	Circulating	Olin
31924090326046	Available	1	Circulating	Olin
31924102550336	Available	1	Circulating	Olin
31924112901750	Available	1	Circulating	Olin
31924112901800	Available	1	Circulating	Olin
31924112901818	Available	1	Circulating	Olin
31924112901826	Available	1	Circulating	Olin
31924112901834	Available	1	Circulating	Olin
31924112901842	Available	1	Circulating	Olin
31924112901867	Available	1	Circulating	Olin
31924112901875	Available	1	Circulating	Olin
31924112901883	Available	1	Circulating	Olin
31924112901891	Available	1	Circulating	Olin
31924115553871	Available	1	Circulating	Olin
31924121895795	Available	1	Circulating	Olin

Add holdings

2. Fill in relevant information including *Barcode* and *Material type* (required).

Item record

[Collapse all](#)

^ Administrative data

Record last updated: 4/29/2021 11:14 AM

☐ Suppress from discovery

Item HRID	Barcode	Accession number	Item identifier
	81924128771296		

[Add former identifier](#)

[Add statistical code](#)

^ Item data

Material type *

Serial

Copy number

1

Call number type

Select type

Call number prefix

Call number

Call number suffix

Number of pieces

Description of pieces

3. Scrolling down will bring you to Permanent loan type which is also a required field.

^ Loan and availability

Permanent loan type *

Circulating

Temporary loan type

Select loan type

Status

Available

[Add check in / check out note](#)

4. Do not fill in the *Location* fields, either *Permanent* or *Temporary*. Simply leave the drop-down menus as "Select location," which is the equivalent to blank. Selecting a location other than the holdings record location selected may corrupt the location that's printed on the spine label and how it appears in Blacklight, which is why it is best to leave these fields blank.

^ Location

Permanent

Select location

[Location look-up](#)

Temporary

Select location

[Location look-up](#)

5. When done filling in the appropriate fields, click *Save and close*.

6. From the Instance record, clicking *Chronology* in the Item records display will allow you to sort chronologically. This will allow you to see the item record you just created.

[Collapse all](#)

Instance record

unspecified

The Theatre annual... A publication of information and research in the arts and history of the theatre.

^ Holdings: Olin > PN2012 .T37

[View holdings](#)[Add item](#)

Item: barcode	Status	Copy number	Loan type	Effective location	Enumeration	Chronology	Volume	Year, caption	Material typ
31924128771296	Available	1	Circulating	Olin	v.73	2020	-	-	Serial
31924121895795	Available	1	Circulating	Olin	v.64-68	2011-2015	-	-	Serial
31924115553871	Available	1	Circulating	Olin	v.59-63	2006-2010	-	-	Book
31924102550336	Available	1	Circulating	Olin	v.54-58	2001-2005	-	-	Book
31924090326046	Available	1	Circulating	Olin	v.49-53	1996-2000	-	-	Book
31924077366411	Available	1	Circulating	Olin	v.44-48	1989/90-1995	-	-	Book
31924112901750	Available	1	Circulating	Olin	v.39-43	1984-1988	-	-	Serial
31924112901842	Available	1	Circulating	Olin	v.34-38	1979-1983	-	-	Serial
31924112901834	Available	1	Circulating	Olin	v.28-33	1972-1977	-	-	Serial
31924112901826	Available	1	Circulating	Olin	v.23-27	1967-1971/72	-	-	Serial
31924112901818	Available	1	Circulating	Olin	v.19-22	1962-1965/66	-	-	Serial
31924112901800	Available	1	Circulating	Olin	v.15-18	1957-1961	-	-	Serial
31924112901891	Available	1	Circulating	Olin	v.11-14	1953-1956	-	-	Serial
31924112901883	Available	1	Circulating	Olin	v.7-10	1948-1952	-	-	Serial
31924112901875	Available	1	Circulating	Olin	v.3-6	1944-1947	-	-	Serial
31924112901867	Available	1	Circulating	Olin	v.2	1943	-	-	Serial

NOTE: An alternative to adding a new item record from scratch is to duplicate an existing item record and edit the enumeration/chronology to match the volume you are creating an item record for.

Item • 31924063502417 • Available

866351 • Last updated: 6/24/2021

Instance: [Beijing review...](#) . Beijing review

Holdings: [Wason > Oversize DS701 .P395 +](#)

Actions

Edit

Duplicate

Delete

Mark as