Serials Receiving in FOLIO (LTS Procedure #129)

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

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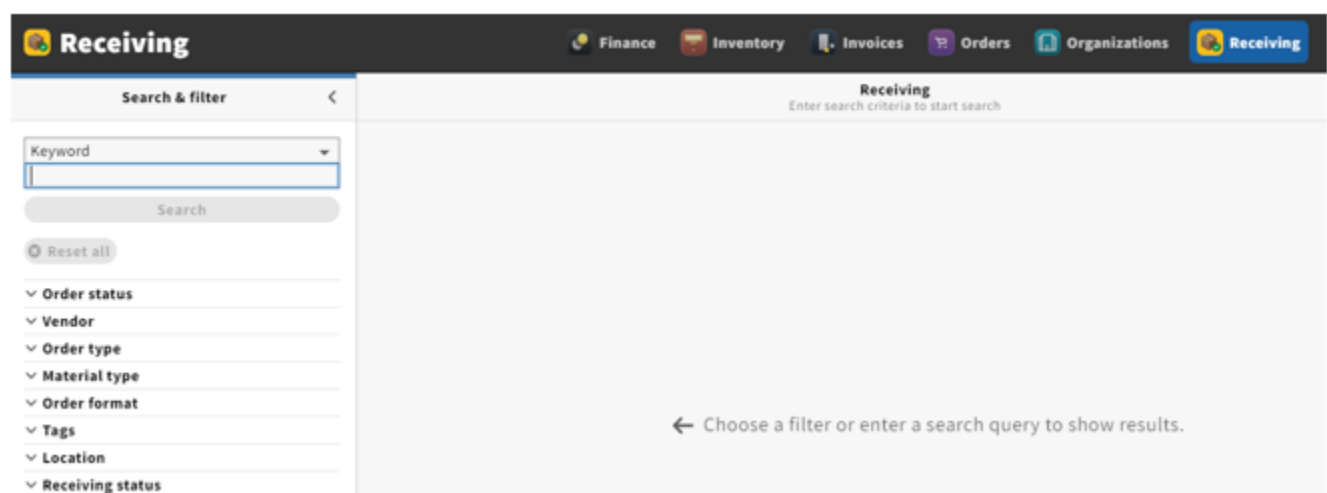
Unit: Serials Management
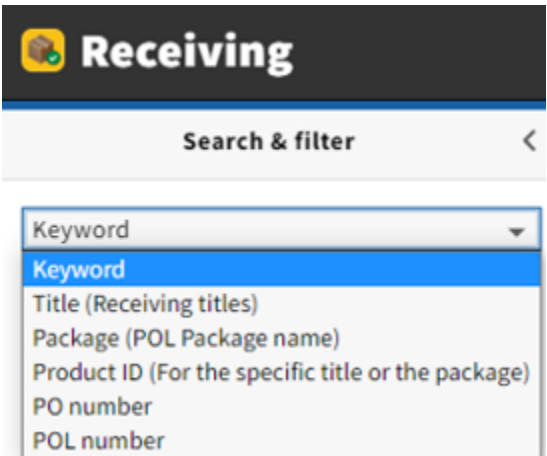
Date last reviewed: 21 Feb 2024

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.

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).

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	Receiving note	Order type
1ABL7092-1	date		
	-		

Actions

+ **Add piece**

Show columns

☑ **Caption**

☑ **Copy number**

Vendor	Material suppl	☑ **Enumeration**
EBSCO	-	☑ **Chronology**

Requester	Receiving	☑ **Comment**
-	workflow	☑ **Piece format**
	Independent or	☑ **Expected receipt date**
	and receipt qua	☑ **Request**

⌃ 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) ▾		☑
Assign a different location		

(Cancel)   (Quick receive)   **Save & close**

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

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

1. 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.

2. 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.

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*.

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

5. Scroll to the bottom of the page. Click **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).

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.

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

Enumeration	Chronology

Piece format *

Physical ▾

Expected receipt date	Comment
MM/DD/YYYY 📅	

Order line locations - **Supplement**

Olin (olin) ☐

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

(**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	
v.1 (1976:Feb./Mar.-Aug.)			🗑
v.4-27 (1979-2002)			🗑
v.34:no.1-3,5-6 (2009:Jan./Feb.-May/June,Sept./Oct.-No			🗑
v.35 (2010)			🗑
v.42:no.3-6 (2017:May/June-Nov./Dec.)			🗑
v.43-46 (2018-2021) ⊗			🗑

(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	
v.46, no. 1-6	2021	🗑

(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.

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

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.*

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
	31924128771296		

(Add former identifier)

(Add statistical code)

∧ Item data

Material type *

Serial ▾

Copy number

1

Call number type	Call number prefix	Call number	Call number suffix
Select type ▾			

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	Temporary
Select location ▾	Select location ▾
Location look-up	**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**   [**Actions ⌃**]
866351 • Last updated: 6/24/2021

     ✏ **Edit**
Instance: Beijing review.. . *Beijing review*   🗐 **Duplicate**
Holdings: Wason > Oversize DS701 .P395 +   🗑 **Delete**

     Mark as