

Last Updated: 20230503scnp

Applies to: NOLANA [RAMSONS - Updating in progress 20250724 NP]

Name of Document: MH COPY for Periodicals or Serials workflow_with Receiving workflow: Independent order and receipt quantity_for POL with Instance linked_[e.g., **Added Volume, Subscription**] & Inventory record related work & Item Check in & Claiming

Resources:

[Handshakes and workarounds](#)

[FOLIO Community Documentation Orders](#)

Steps

To Create the Piece:

- If needed retrieve POL for thing-in-hand in Orders [Otherwise can also Search & filter in Receiving directly]
- If in Orders: POL > Actions > Right click **Receive** to open in further tab
- In Receiving open 3rd pane by clicking on Title
- Make note of information in Receiving note (Ramsons: You will not be able to see the receiving note when working with the piece)
- In 3rd pane: In Expected accordion Actions > Add piece
- If there is a Receiving note [and **Must acknowledge receiving note** is toggled on {see below}], then the Receiving note modal appears: Continue
- **Add piece** (with Ramsons, no longer functions like a modal, opens full screen)
 - **Display summary:** enter thing-in-hand descriptive info like v.49 or Bd.50:12(2021) etc. following designated pattern BUT NB: will transfer to Item when Item is created.
 - [NB: Caption in the Receiving App is what we consider to be Volume in the Inventory App]
 - **Enumeration:** see Inventory for the correct way to model this information
 - **Chronology:** see Inventory for the correct way to model this information
 - Add **Expected receipt date** (may be same day as piece creation)
 - **Comment:** enter the POL number (for **Standing Orders**, also enter the vendorcode&invoice number like: MH30223-1 | MHYCONT384000 OR MH926-1 | MHYAPAV523134)
 - [NB: if Comment was added during Piece creation, it will display in the Comment column]
 - [NB: **For Periodicals & Added volumes, LEAVE CREATE ITEM Toggle OFF** (item will be created at time of receipt)]
 - **Select holdings:** ALWAYS choose the PERMANENT location (ex.MH Periodical Stacks > Periodical OR MH Pratt Periodicals)
 - **Display on Holding:** Toggle On (this action adds the piece to create a receiving history on the holdings record)
- Save & close to create an Expected Piece

- NOTE: If there is a need to create multiple pieces, toggle on **Create another** and option will change to Save (NOT Save & Close). When finished creating pieces, toggle off Create another to get the Save & Close option.

To receive the Piece:

- In the Expected accordion, Actions > **Receive**
- Receiving Note will display if it had been toggled to on
- In the far left column, select the box to the right of the Caption of the piece to be received
- THIS MUST BE DONE IN ORDER TO ADD INFO IN THE BARCODE FIELD: Scroll to the far right and Toggle on Create Item
- Add Barcode if applicable [for Periodical Subscriptions: we have been entering the Caption data into the barcode field (by copy & paste) since it does transfer to Inventory. Later in Inventory, we will use it (cut) to create our Enum Chron and Volume fields after which the barcode will be made with item HRID-MH]
- Do not add Call Number here [will be added to Item from Holdings in Inventory]
- Click Receive button
- Now Piece shows in Received accordion
- For Subscriptions we have been adding an Expected piece. This piece is added WITHOUT creating an Item for Inventory. (Create item is NOT toggled on). The proper format for the Caption should already be on the clipboard from when the caption was copied to the barcode for the previously received item. Paste that information into the Caption field and edit it to reflect the next expected issue. Set an Expected receipt date in the future according to the item's frequency of receipt. Save & close.
- Final step: Open the just received Piece (now in the Received accordion) and X out the (no longer needed) Expected receipt date

Receiving > Inventory: to complete Item set up

- To complete Item set up, further editing is necessary in **Inventory**
- Find the Item > click on hyperlinked barcode to open Item > choose Actions > Edit
- Periodicals: Copy (or Cut) the information in the Barcode field
- Scroll down to the **Enumeration Data accordion** and paste the information from the Barcode field into the **Volume** field. Confirm (if this information was entered in the Receiving App) or Enter the **Enum & Chron** fields following the patterns created by migrated/previous Items based on the specifics from the now Volume field--for a standard pattern and to make each Item unique by its Enum & Chron
- for Standing Orders Item Data > **Material type** is Book

- Scroll further down to **Loan and availability** and make sure the **Permanent loan type** is appropriate to the Item
 - Periodical Stacks **Permanent loan type**: 4 week
 - Pratt Periodicals: **Permanent loan type**: 1 week
- Periodicals: Scroll up to the Barcode field
- Periodicals: Copy the Item HRID
- Periodicals: Paste the Item HRID as is & suffix with MH (dashMH) [MH must be in CAPS]: ex. it00100164488-MH
- Periodicals: Copy the Item barcode to the clipboard > Save and close
- Click on the X in the upper left corner to get to the Instance Record in Inventory

Inventory > Check in : to make Item status Available (for Standing Orders DO NOT CHECK IN)

- The Status of the item you were working on remains “In process”. To make the status change to “Available”, you need to Check in the item via **Check in**.
- Working in **Check in**, Scan or enter barcode in the designated box. The item barcode should still be copied to the clipboard so paste the barcode into the box > Enter
- Confirmation of the Check in will appear as a line item. The Status is now Available.
- End session (to end that check in session)

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ALTERNATIVE WAY To Handle the Piece Creation and Receipt for PERIODICALS (this works when an expected piece already exists):

DO THIS FIRST: Using the existing piece in the Expected section, Create the next expected piece

- If needed retrieve POL for thing-in-hand in Orders [Otherwise can also Search & filter in Receiving directly]
- If in Orders: POL > Actions > [NOTE: Ramsons: selecting **Receive** will activate the Receiving App AND you will no longer see the Order]
- In Receiving open 3rd pane by clicking on Title
- Make note of information in Receiving note (Ramsons: You will not be able to see the receiving note when working with the piece because it no longer functions like a modal)
- **Choose the piece already in the Expected Accordion section**
- Notice Edit piece is at the top of the screen
- Using the arrow to the right of Save & close, choose Save and create another
- Notice Add piece is at the top of the screen
- **Working with: Add piece** (with Ramsons, no longer functions like a modal, opens full screen)
 - **Display summary**: enter/edit thing-in-hand descriptive info like v.49 or Bd.50:12(2021) etc. following designated pattern -- This information WILL transfer to the Display summary field in the Item record when Item is created.
 - **Enumeration**: make the edit
 - **Chronology**: make the edit

- Add **Expected receipt date**
- **Comment:** confirm the POL number
- [NB: **For Periodicals, LEAVE CREATE ITEM Toggle OFF** (item will be created at time of receipt)]
- **Select/Confirm holdings:** ALWAYS choose the PERMANENT location (ex.MH Periodical Stacks > Periodical OR MH Pratt Periodicals)
- **Display on Holding:** Toggle On (this action adds the piece to create a receiving history on the holdings record)
- Save & close to create an Expected Piece

Steps to receive the piece

- Select the Expected piece
- Receiving Note will display if it had been toggled to on
- Notice Edit piece is at the top of the screen
- Confirm or Edit the information in the Display summary, Enumeration and Chronology fields
- Expected receipt date: x to change to blank
- Create item: Toggle On
- Using the arrow to the right of Save & close, choose Quick receive
Now Piece shows in Received accordion

Receiving > Inventory: to complete Item set up

- To complete Item set up, further editing is necessary in **Inventory**
- To get to the Inventory item from the Receiving Piece, First, open the Receiving Piece then Click on the hyperlinked word Connected (located under Create item)
- The item will open in Inventory > choose Actions > Edit
- Barcode: Copy the information from the Item HRID, Paste in Barcode field and add suffix -MH [like it00036492290-MH]
- Scroll down to the **Enumeration Data accordion**
- Cut the information listed in the Display Summary
- Paste the information in the Volume
- Scroll further down to **Loan and availability** and make sure the **Permanent loan type** is appropriate to the Item
 - Periodical Stacks **Permanent loan type:** 4 week
 - Pratt Periodicals **Permanent loan type:** 1 week
- Save and close
- Click on the X in the upper left corner to get to the Instance Record in Inventory
- Sort the items by chronology to get the most recent item to display at the top of the screen (this method works most of the time)
- If Recent Periodical items are to be shelved on the Periodical Display or in the Stimson Room, need to move the item from the MH Periodical Stacks Holdings to the Periodical Display/Stimson Room Holdings
- Under actions: select Move items within an instance

- Select the empty box to the left of the Item(s) to be moved
- Under Move to: select the location Item is to be moved to
- Open the Display/Stimson Holdings and confirm the Item is now located on that Holdings Record

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Inventory > Check in : to make Item status Available

- The Status of the item you were working on remains “In process”. To make the status change to “Available”, you need to Check in the item via **Check in**.
- Working in **Check in**, Scan or enter barcode in the designated box. The item barcode should still be copied to the clipboard so paste the barcode into the box > Enter
- Confirmation of the Check in will appear as a line item. The Status is now Available.
- End session (to end that check in session)

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Additionally, for **Subscriptions**, add at least one piece ahead every time, and make the **Expected receipt date** the actual expected receipt date in accordance with the title’s applicable frequency. This enables staff to know when an issue has been missed/skipped--and so may wish to claim. Also staff can filter on Expected receipt date, which could also help staff to proactively discover when issues have failed to arrive as expected and need to be claimed.

Receiving subsequent pieces

- **Receiving subsequent pieces (this workflow assumes there is already an Expected piece)**
- Confirm that the piece that is already in the Expected accordion (previously created as the next piece we expect to receive on our subscription) is the piece you want to receive. If needed, Add piece for the Expected item that you have in hand.
- Actions > Receive (This takes you to a list of all possible pieces that can be received). The Receiving note displays at the top in a “banner”.
- Select the box to the left of the piece to be received
- Scroll all the way to the right to see the Create item column. Check the box in the Create item column for the piece you want to receive (in order to have an Item created in the Inventory and to be able to enter information into the Barcode field)
- Scroll back to the left and copy the information in the Caption and paste it into the Barcode field (this will carry over from Receiving to Inventory and will be used to create the Item Volume field)
 - NOTE: IF an item’s Holdings Permanent location should be a different location from the one linked through the order, you can use the **Create new holdings for location** or use the drop-down to possibly select from an already other existing Holdings location. **Create new holdings for location** brings up a modal called Select permanent location. In the Select permanent location > Select Campus (Mount Holyoke College) > Select library (ex. MH Main Library) and choose the

Holdings permanent location from the Location drop-down menu. Save and close.

- **Receive**
- You should get a confirmation toast “receiving successful” and you will also be returned to the 3 pane display.
- In the Expected accordion, Add piece for the next expected piece (the caption from the previous piece should still be on the clipboard so this info can be pasted into the Caption section and edited there. Select an Expected receipt date. **DO NOT SELECT** the Create item box at this time. Save & close.
- Complete the Inventory workflow & Check in workflow for the Item (created from the piece you have just received)

Notes:

- A Piece is not the Item it may create. They are separate entities. Pieces (Receiving) can be a further link/bridge between Orders and Inventory.
- A **Receiving note** may have been added in the POL (**Orders** app) and if it is desired that it display when adding and receiving pieces THEN you must go to the PO Line details section in **Receiving** and toggle on: **Must acknowledge receiving note** otherwise it will NOT display. However, the Receiving note does appear as a banner when in Receive mode (but not when one Adds piece). To toggle ON: Edit the POL IN Receiving:

The screenshot shows the 'Receiving' app interface. At the top, there's a navigation bar with various icons. Below it, a search and filter section is visible. The main area displays a table with columns: Title, Expected receipt date, Package, and POL number. A single row is shown with the title 'Oxford studies in metaphysics.' and POL number 'MH954-1'. To the right, a detailed view of this item is shown, including a 'Title information' section and a 'POL details' section. The 'POL details' section includes fields for 'POL number', 'Expected receipt date', 'Receiving note', and 'Order type'. The 'Receiving note' field contains the text 'Added Volume: Pattern: v.# [Receiving note]'. A yellow banner at the bottom right of the detailed view says 'Must acknowledge receiving note' with a checkmark icon.

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PO line details

POL number* Expected receipt date Receiving note Must acknowledge receiving note

MH954-1 - Added Volume: Pattern: v.# [Receiving note]

POL number look-up

The **Caption** field of the piece in **Receiving** may or may not have unlimited characters. On 20211116 it accepted as many characters as it was given, the previous week it accepted approximately 25-30 characters.

Inventory: How to move items between Holdings

- In the Inventory app, If there are multiple holdings locations on an instance record (ex. MH has titles that have items located in the Periodical Stacks & on the Periodical Display) it is possible to move items between the holdings locations
- Open the accordions to be able to see the items linked to each holdings record
- Actions > Move items within an instance (this action will add a Move to button on the screen next to each Holdings and a box that can be checked to select each item. There is also a box at the top of the list of holdings to select ALL items.
- Select the box next to the item that you want to move
- Use the arrow on the Move to drop-down to choose the holdings to move the item to
- You should see a green toast to confirm the action has been successful. At this time, the accordions will close and the items linked to each holdings record are no longer visible.
- Actions > Stop items movement within an instance

Receiving: CLAIMED issues

- **Finding “late” issues to be CLAIMED/Investigated in Receiving**
- Search >
 - Receiving status: Expected
 - Acquisition unit: MH
 - Expected receipt date
 - Choose From & To dates (From date make: 01/01/2006) & Click Apply
- Records with Pieces that are “expected” in that date range should be found
- **Representing CLAIMED issues as Pieces in Receiving and Items in Inventory**
- CLAIMED issues will appear in Receiving in the Expected accordion as pieces and will also appear as items in Inventory
- There is not a way to indicate that a piece OR item has a status of Claimed in the current version of FOLIO so MH has decided to include the Claimed information in the Caption of the missed piece.
- Select the piece in the Expected section to get the **Edit piece** modal
 - In Edit piece, after the information in the **Caption**, add an underscoreCLAIMED yearmonthdate (ex v.5:no.10(2020)_CLAIMED 20211112) or for damaged copies, (ex v.5:no.10(2020)_CLAIMED REPLACEMENT 20211112)
 - In the **Comment section** also include the information (ex. Claimed via EBSCOnet 20211116)
 - TOGGLE ON: **Create item** (this action will create an item in inventory that displays a Status of On order)
- **Save & close**
- The piece remains in the Expected accordion with amended information CLAIMED date
- Open the **Instance in the Inventory App**
 - IF needed move the item to MH Periodical Display or MH Stimson Room Periodicals Holdings record

- Copy caption from piece (with claimed information) and paste into Item Volume field
- Edit Item record to update Loan and availability > Permanent loan type: 4 weeks (1 week for Pratt) and until the item is received, make Temporary loan type: Non-circulating
- When the **CLAIMED piece Arrives**
 - Receive piece
 - Caption: delete _CLAIMEDdate
 - Retain claim information in Comment
 - **Select location** should remain the ultimate permanent location (ie. Periodical Stacks or Pratt Periodicals)
 - In Inventory:
 - IF needed move the item to MH Periodical Display or MH Stimson Room Periodicals Holdings record
 - Edit Item:
 - Create barcode
 - Volume: delete _CLAIMEDdate
 - Loan and availability: IF already in ultimate Permanent Location, remove Temporary loan type of Non-circulating by choosing **Select loan type**; BUT retain Temporary loan type of Non-circulating IF moved to MH Periodical Display or MH Stimson Room Periodicals
 - Check in Item to make status Available

DAMAGED ISSUE that will be shelved now AND a replacement is claimed

Follow the procedures for CLAIMED piece with these modifications:

- Receiving:
 - Caption: edit like: v.5:no.10(2020)_CLAIMED REPLACEMENT 20211112
 - Comment: also include the information (ex. Replacement Claimed via EBSCONET 20211116)
 - Receive the piece and make sure the information in the Caption is copied to the Volume field of the Item
- Inventory:
 - Item > Item notes
 - Note type: Note
 - Note: ex. Damaged copy shelved, Replacement Claimed via EBSCONET 20211116)
 - Toggle On: Staff only

When the REPLACEMENT piece Arrives

- **Receiving** (piece)
 - Caption: Update like: _RECEIVED REPLACEMENT 20220812
 - Retain claim information in Comment
 - Select location should remain the ultimate permanent location (ie. Periodical Stacks or Pratt Periodicals)

- **Inventory (item)**
 - Caption: delete _CLAIMEDdate
 - Retain claim information in Note OR add another note: Replacement Received_date
 - Toggle On: Staff Only
 - **Select location** should remain the ultimate permanent location (ie. Periodical Stacks or Pratt Periodicals)
- When the **CLAIMED piece will NEVER be RECEIVED (Out of Print, not within claim period)**
 - Receive piece
 - Caption: change: _CLAIMEDdate to _NEVER RECEIVED
 - Retain claim information in Comment & add note that we will NOT receive the piece according to EBSCO or Harrassowitz, etc. and the reason why we will not receive the piece
 - **Select location** should remain the ultimate permanent location (ie. Periodical Stacks or Pratt Periodicals)
 - In Inventory (CLAIMED piece already exists as an Item in Inventory):
 - IF needed move the item to MH Periodical Display or MH Stimson Room Periodicals Holdings record
 - Edit Item:
 - Barcode: Paste the Item HRID as is & suffix with MH (dashMH) [MH must be in CAPS): ex. it00100164488-MH
 - Volume: change: _CLAIMEDdate to _NEVER RECEIVED
 - Item notes: Note: YYYYMMDD: Publisher reports issue v.133:no.1588(2022:Aug.) is Out of Print and check off Staff Only
 - Permanent Loan Type: Keep as whatever the Permanent Loan would be for the item. (No need for Temporary Loan Type Non-circulating since item is going to be Marked as Unavailable)
 - Check in Item to make status Available
 - Return to Inventory Item and: Mark as Unavailable
 - Holdings Record: update Holdings statement to reflect the “gap” in holdings

20230606: Publisher reports issue is out of print

- **Representing gaps in Holdings**
- Inventory > View holdings
- Actions > Edit
- Holdings details > Holdings statement
- Edit the holdings statement to reflect the gap in the holdings
- Save and close

Orders: Receiving note is located and edited in the Orders app

- The Receiving note is located in the Purchase Order Line (POL) of the Order
- Actions>Edit
- Enter information into the Receiving note (20211117: may want to add update 020, 505 for items that are Added vols?)
- Save & close
- If you want the Receiving note to display, you must go to Receiving>PO line details and check the box for Must acknowledge receiving note. EVERY TIME an edit is made to the POL of the Order (even if it has nothing to do with the Receiving note) the Must acknowledge receiving note box gets unchecked in the Receiving app.