

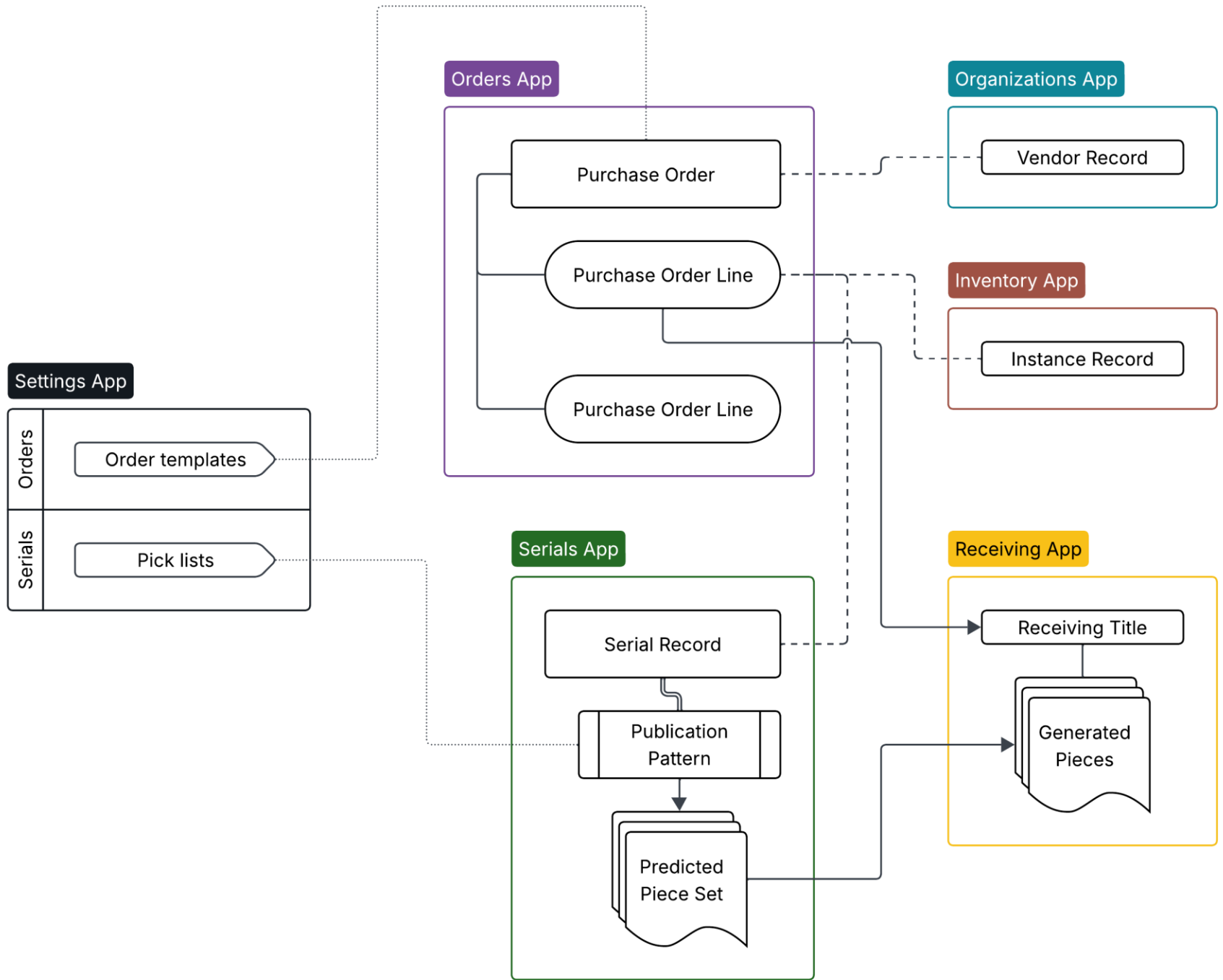
# Leveraging FOLIO's Serials App for Success

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Steve Jamieson

Library Director

Covenant Theological Seminary



# Overview

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- Create a Purchase Order and a Purchase Order Line (POL)
- Create a Serial Record with a Publication Pattern
  - Generate a Predicted Piece Set
  - Generate Receiving Pieces
- Receive or Claim Issues





# **Create a Purchase Order**

---



[Collapse all](#)

**Template name**

Serial - Standard ▾

^ **Purchase order**

**PO number**

12047

**Vendor\***

EBSCOnet ✕

[Organization look-up](#)

**Bill to**

Covenant Seminary ▾

**Order type\***

Ongoing ▾



**Address**

Covenant Seminary Library  
12330 Conway Road  
St. Louis, MO 63141

**Ship to**

Covenant Library ▾

**Address**

Covenant Seminary Library  
478 Covenant Lane  
St. Louis, MO 63141

**Manual** ⓘ

**Re-encumber**



**Created by**

-

**Created on**

-

**Tags**

▾

[Add note](#)

^ **Ongoing order information**

**Subscription**



**Manual renewal**

**Notes**

^ **PO summary**

**Total units**

-

**Total estimated price**

-

**Approved**

**Workflow status**

Pending



# **Add a Purchase Order Line**

---

[Collapse all](#)

**Template name**

Serial - Standard ▾

^ **Item details**

Package

**Title \***

[Connected](#)

Journal of Perpetual Lateness



[Title look-up](#)

**Receiving note**



**Must acknowledge receiving**

**note**



**Publication date**

**Publisher**

**Edition**

**Linked package**

[Lookup package POL](#)

**Contributors**

Please add contributor

[Add contributor](#)

**Product identifiers**

Please add product ID and product ID type

[Add product ID and product ID type](#)

**Internal note**

^ **PO line details**

PO number

Acquisition method \*

Acquisition cost

Subfund \*

Internal note

^ PO line details

POL number

-

Acquisition method \*

Subscription

Automatic export

Order format \*

Physical resource

Created on

-

Receipt date

MM/DD/YYYY

Receipt status

Payment status

Source

User

Donor ⓘ

Selector

Requester

Claiming active

Claiming interval \*

30

Cancellation restriction

Rush

Collection

Receiving workflow ⓘ \*

Independent order and receipt

Cancellation description

Line description

Tags

∨ Donor information

^ Ongoing order information

Renewal note

^ Vendor

# Example Claiming Intervals

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Publication Frequency	Suggested Claiming Interval
Weekly/Biweekly (2+/mo.)	7
Monthly/Bimonthly (6-12/yr.)	14
Quarterly (3-5/yr.)	30
Semiannual (2/yr.)	60
Annual (1/yr.)	90

### ^ Cost details

Physical unit price\*

100

Quantity physical\*

1

Additional cost


Currency\*

US Dollar (USD)

Current exchange rate

-

Use set exchange rate

Set exchange rate 

Electronic unit price

Quantity electronic

Discount

Type

%  \$

Estimated price 

\$100.00

### ^ Fund distribution

Remaining amount to be distributed: \$0.00

Fund ID\*

6413 - Serials (serials)

Value\*

100

Type

%  \$

Amount

\$100.00



Add fund distribution

### ^ Location

Name (code)\*

Covenant Seminary Periodical (COV-PER)

[Location look-up](#)

Add location

Quantity physical

1

Quantity electronic



### ^ Physical resource details

Create inventory\*

None

Material type

Please add volume

Add volume



# Multiple Purchase Order Lines on a Purchase Order?

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- 1-to-1 relationship between PO and Invoice or EBSCO renewal not necessary
- Easier to cancel a title if it's on its own PO
- Grouping bundled titles (maybe?)



# **Create Serial Record**

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PO line: 12047-1

Replace PO line



**Order number**

12047

**Order status**

Open

**Acquisition units**

-

**Product IDs**

-

**Vendor**

EBSCOnet (ebSCO)

**Funds**

- serials

**Material type**

-

**Title**

Journal of Perpetual Lateness

**Status\***

Active

**Description**

^ **Notes**

Add note



# **Add a Publication Pattern**

---



Status\*

Active

Description

[Collapse all](#)

^ Publication cycle

Cycle length ⓘ

Time unit\*

Month

Number of months\*

3

No. of issues published per cycle ⓘ\*

1

Days of publication, per cycle ⓘ

Day format\*

Day (1-31)

Issue 1

Day\*

15

Of month\*

3

^ Omission rules

No omission rules for this publication pattern

[Add omission rule](#)

^ Combination rules

No combination rules for this publication pattern

[Add combination rule](#)

^ Labelling


Label 1





Label style\*

Enumeration format\*

## ^ Labelling

**Label 1** 

**Label style \*** Enumeration **Enumeration format \*** Enumeration Numeric


Level	No. of units *	Format *	Sequence *	Internal note	
1	1	Number (1, 2, 3)	Continuous	v.	
2	6	Number (1, 2, 3)	Reset	no.	

[Add level](#)

**Label 2** 




**Label style \*** Chronology **Chronology format \*** Chronology Year **Locale \*** English

**Year format \*** 2023

**Label 3** 

**Label style \*** Enumeration **Enumeration format \*** Enumeration Textual

**Pick list \*** Seasons

Order	No. of issues *	Label text *	Internal note	
1	1	Spring		
2	1	Summer		
3	1	Fall		

Add level

Label 2



Label style \*

Chronology

Chronology format \*

Chronology Year

Locale \*

English

Year format \*

2023

Label 3



Label style \*

Enumeration

Enumeration format \*

Enumeration Textual

Pick list \*

Seasons

Order

No. of issues \*

Label text \*

Internal note

1

1

Spring



2

1

Summer



3

1

Fall



4

1

Winter



Add value

Add label

Template ⓘ \*

v.{{enumeration1.level1}}:no.{{enumeration1.level2}} {{enumeration2}} {{chronology1.year}}



# Label Types

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## Enumeration Numeric

Used for:  
Volume and Issue Numbers

Multiple hierarchical levels

```
{{enumeration1.level1}}  
{{enumeration1.level2}}
```

## Chronology

Used for:  
Dates

```
{{chronology1.year}}  
{{chronology1.month}}  
{{chronology1.monthDay}}  
{{chronology1.weekday}}
```

# Label Types

---

## Enumeration Textual

Used for:

Seasons and non-numeric sequences

- Settings > Serials > Pick lists
- Settings > Serials > Pick list values

{{enumeration2}}

Pick List Ideas:

- Seasons  
Spring, Summer, Fall, Autumn, Winter
- Bimonthly  
Jan/Feb, Mar/Apr, etc.
- Church calendar  
Advent, Lent, Easter, Pentecost



# **Generate a Predicted Piece Set**

---

## Generate predicted pieces

**Start date \***

01/01/2025



**Note**

### Values to use for the first issue

**Label 1**

**Level 1 \***

15



**Level 2 \***

1



Issue count	Issue publication date	Display summary
1	1/14/2025	v.15:no.1 (January 2025)
2	3/14/2025	v.15:no.2 (March 2025)
3	5/14/2025	v.15:no.3 (May 2025)
4	7/14/2025	v.15:no.4 (July 2025)
5	9/14/2025	v.15:no.5 (September 2025)
6	11/14/2025	v.15:no.6 (November 2025)

Close

Preview

Generate



# **Generate Receiving Pieces**

---

## Generate receiving pieces

Selecting 'Generate receiving pieces' will create new pieces in the Receiving app. Please wait while the pieces are generated. This window will close when the process is complete.

Total pieces	Piece set generated	Start date	Pattern ID
6	2025-06-01T00:56:45Z	2025-01-01	-
<b>First piece</b>	<b>Last piece</b>		
2025-01-15, v.15:no.1 (January 2025)	2025-11-15, v.15:no.6 (November 2025)		

**Time between publication and receipt (days)** ⓘ \*

7



**Piece format**

Physical

**Supplement** ⓘ

**Location** \*

Close

Generate receiving pieces



# **Receive or Claim**

---

## Edit piece

Record last updated: 5/31/2025 7:59 PM

### ^ Piece details

#### Display summary

v.15:no.1 (January 2025)

#### Copy number

#### Enumeration

#### Chronology

#### Piece format\*

Physical

#### Expected receipt date

01/15/2025



#### Comment

#### Internal note

#### External note

#### Supplement

#### Order line locations

Covenant Seminary Periodical (COV-PER)

#### Name (code)

Covenant Seminary Periodical (COV-PER)

[Location look-up](#)

### Item details

### Status log

Cancel

Save and create another

- Quick receive
- Send claim
- Delay claim
- Unreceivable
- Delete

Save & close

v.15:no.6 (November 2025)

Expected

< Previous

1 - 6

Next >

^ Receiving status ✕

- Expected
- Received
- Late
- Claim delayed
- Claim sent
- Unreceivable

### Delay piece

**Delay to \***

📅

Cancel Save & close

### Send claim

**Claim expiry date \***

📅

**Internal note**

**External note**

Cancel Save & close

# Thanks!

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Steve Jamieson

[steve.jamieson@covenantseminary.edu](mailto:steve.jamieson@covenantseminary.edu)