Add volume to a monographic series

Discover how to add a volume to a monographic series from Discover Items and how to add or remove a volume from the Order Item details screen in WorldShare Acquisitions.

Add a volume to a monographic series from Discover Items

You can add a volume to an uncompleted monographic series from Discover Items. An uncompleted monographic series will have the following settings:

- Processing Type - Monographic Series
- Order Status - Ordered
- Receipt Status - Not Received or Partially Received

1. Search for a bibliographic record for the volume from the monographic series.
2. From the search results, find the item you want to add and click Add to > Series.
3. From the Add to Monographic Series dialog window, select the monographic series to which you want to add the volume. You can search for the monographic series using the available indexes and filters.
4. Click Add to Series. The Item Added to Series dialog window appears with a confirmation message that the volume has been added to the monographic series.
   Note: The location and quantity of the volume will be the same as that of the monographic series.
5. From the Item Added to Series dialog window, select when you want to receive the item.
   - Receive Item Now - Select to be taken to the Receive and Invoice screen with this volume automatically selected. To receive and/or invoice the item, see Receive and/or Invoice.
   - Receive Later - Select to close the Item Added to Series dialog window and receive the item at a later time.

Note: The order item number for the series volume will be formatted as follows: [order number]-[sequential integer for order item]:[sequential integer for volume] (e.g., PO-2019-1-1:1)

Add a volume to a monographic series from the Order Items detail screen

1. On the left navigation, click Orders > Order Items > Search.
   Or
   On the left navigation, click Orders > Orders > Search.
2. From the Order Items screen, click the Title/Name of an order item to view the Order Item Details screen (for the monographic series).
   Or
   From the Orders screen, click the Order Name to open the Order screen. From the Order screen, click the Title
(ISBN/ISSN) of the monographic series. The Order Item Details screen opens.

3. From the Order Item Details screen, click Series Info > Add Volume.

4. From the Add Volume dialog window, search WorldCat for the volume you want to add to the monographic series.

5. Click the title of the volume you want to add to a monographic series. The Item Added to Series dialog window appears with a confirmation message that the volume has been added to the monographic series.
   Note: The location and quantity of the volume will be the same as that of the monographic series.

6. From the Item Added to Series dialog window, select when you want to receive the item.
   ◦ Receive Item Now - Select to be taken to the Receive and Invoice screen with this volume automatically selected. To receive and/or invoice the item, see Receive and/or Invoice.
   ◦ Receive Later - Select to close the Item Added to Series dialog window and receive the item at a later time.

Remove a volume from a monographic series

You can remove a volume from a monographic series as long as the volume has not been received or invoiced.

1. On the left navigation, click Orders > Order Items > Search.
   Or
   On the left navigation, click Orders > Orders > Search.

2. From the Order Items screen, click the Title/Name of an order item to view the Order Item Details screen.
   Or
   From the Orders screen, click the Order Name to open the Order screen. From the Order screen, click the Title (ISBN/ISSN) of the monographic series for the volume you want to remove. The Order Item Details screen opens.

3. From the Order Item Details screen, click the Series Info tab.

4. Locate the volume you want to remove in the series volumes table and click the Delete button in the Action column.

5. From the Delete Volume dialog window, click Delete to confirm the action. The volume is removed from the monographic series.

Watch a video

Monographic series (10:43)

This video shows how to manage monographic series in WorldShare Acquisitions so you can encumber funds for the series subscription, and expend funds as volumes are added to the series.