Receive monographs and add holdings to WorldCat

1. From the left navigation, click Receive and Invoice.
2. Select Monographs from the Processing type drop-down list.
3. Select Receive from the Action drop-down list.
4. Click View Items.
5. Click the Search Text form field and then press <Enter>.
6. Find the items you want to receive and invoice.

Find a specific item
   1. Search by barcode, ISBN, ISSN, OCLC number, or title, using the search box. Search results appear automatically when you stop typing.
   2. To return to the list of outstanding items, delete all text from the search box.
   3. Barcode searches are possible only after importing shelf ready data. See Import invoice and shelf-ready data.

Find all items on an order
   1. Enter the full Order Number (PO number), including “PO” and dashes (-), in the Search box. Search results appear automatically when you stop typing.
   2. To return to the list of outstanding items, delete all text from the search box.

7. You may also narrow your search by one of the filters below.

Search filters - Table

<table>
<thead>
<tr>
<th>TO SEARCH BY</th>
<th>USE RETRIEVAL METHOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Select an index with which to limit your search from the list:</td>
</tr>
<tr>
<td></td>
<td>◦ Keyword</td>
</tr>
<tr>
<td></td>
<td>◦ Title (default)</td>
</tr>
<tr>
<td></td>
<td>◦ Copy Number</td>
</tr>
<tr>
<td></td>
<td>◦ Barcode</td>
</tr>
<tr>
<td></td>
<td>◦ Invoice Number</td>
</tr>
<tr>
<td>TO SEARCH BY</td>
<td>USE RETRIEVAL METHOD</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Content Type</td>
<td>Select the content type of the item from the list.</td>
</tr>
<tr>
<td>Branch</td>
<td>Select the branch the item is to be delivered to from the list.</td>
</tr>
<tr>
<td>Order Status (not available for editing when action is set to Receive)</td>
<td>Select the degree to which the order has been placed:</td>
</tr>
<tr>
<td>Receipt Status</td>
<td>Select the degree to which the order has been completed:</td>
</tr>
<tr>
<td>Purchase Status</td>
<td>Select the degree to which invoicing has been completed:</td>
</tr>
</tbody>
</table>
8. Fill in call number fields. Follow local practice.
   Note: The Classification and Cutter fields will be populated for an order item if there is a valid 050 field in the record.

9. Fill in barcode field (use scanner or type barcode). If typing the barcode, the cursor must be in the field when you press <Enter>.

Result

- The item moves to the Items processed in this session area at the bottom of the screen.
- The barcode links to the item record.
- The item is now available in WMS Circulation and WorldCat Discovery.
- If the item has a hold or a Requestor, the system displays an alert at the top of the screen by default. Contact OCLC Support or your Implementation Manager to turn off this feature.

To set cost of item

The cost field (876 $c of the LHR) is filled in automatically with the price of the item from the order. When the item is received, its cost is assigned according to either:

1. Total unit cost (including any service charges, shipping, discounts, or taxes). This is the default for all existing and new libraries.
2. Unit cost (excluding any service charges, shipping, discounts, or taxes)
3. No cost is assigned

To change how item cost is assigned, contact OCLC Support or your Implementation Manager.

10. Next steps:

- Optionally, you can print labels for received items.
- To edit the item record, click the barcode.
- Follow these steps to add ordered items to invoice.
- To pay the invoice, see Edit an invoice and Pay an invoice.

Learn more in a training course: Receiving and invoicing monographs.

View the WorldCat record for an order item

You can view the WorldCat bibliographic record for an order item in WorldShare Record Manager or your WorldCat Discovery instance. This allows you to verify that the record for a received item is correct by:

- Viewing the metadata and, if needed, editing a record before receiving (Record Manager)
- Viewing the patron-facing record (WorldCat Discovery)

Note: This functionality does not apply to items with either of the following processing types

- Electronic Product
- Local
1. From the Receive and Invoice screen, hover over the information icon (i) next to the order item title.

2. The information pop-up window provides the following links:
   ◦ View/Edit Metadata - Click to open the full MARC 21 bibliographic record in Record Manager. This link only appears if you have permission to view Metadata.
   ◦ View in WorldCat Discovery - Click to open the bibliographic record in your WorldCat Discovery instance.

Receive monographs without adding the items to your holdings

One or more ordered items can be received without adding them to your holdings. To do this you receive the items without entering the Barcode and other holdings details.

1. From the left navigation, navigate to one of the following screen:
   ◦ Orders > Order Items
   ◦ Orders > One Time Items
   ◦ Orders > Missing Order Items

2. Click Search to view all results.

3. On the results list, select one or more items by entering a tick in the check box. The options at the top of the screen become active.

4. Click Receive to process the item(s) you ticked.
   ◦ The items that will be received are listed
   ◦ Any items that cannot be received are shown in a dropdown

5. When you click the Receive button:
   ◦ The Receipt Status changes to Received.
   ◦ You do not have to enter a barcode and the item is not included in your holdings.
   ◦ The Copies Received column is incremented by the quantity received.

6. To subsequently add the item to your holdings, see Receive monographs and add holdings to WorldCat.

Note: You will need to narrow your search to Received items to find monographs previously marked as Received.