

Receiving Single-Part Monographs (Voyager)

Scope: *Acquisitions staff use this procedure to receive single-part monographs from approved purchase orders and pending invoices.*

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Receiving monographic line items on an approved purchase order

Monographic line items may be received on the purchase order on which they were ordered. The item does not have to be invoiced to be received on a purchase order. Once you have called up the appropriate purchase order, proceed as follows:

1. Click the row label to the left of the line item to highlight it. This enables the **Receive/Mark** button. (**Note:** if the line item type is **Subscription** and a component has been created, the Receive/Mark button will not enable. You must receive or mark a serial issue from Serials Check-In).
 2. Click the Receive/Mark button. The **Receiving/Marking** dialog box displays (see illustration below).
 3. To receive the line item, click on the Receive button. If you entered a Requester in the purchase order line item defaults, a message displays, indicating who requested the item.
 4. An item record is automatically created if you have selected in your **Session Preferences** to automatically create an item record when a line item is received from a purchase order. If you have not chosen to automatically create an item record when an item is received from a purchase order, you can manually create an item record for the received item by clicking the Item button beside the **Copy Seq. #** field.
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Receiving More Than One Copy at a Single Location

If you have ordered more than one copy of a title for one location on a single line item, it is possible to receive all copies at once, or only some of the copies, as appropriate.

1. To receive all copies at once, select **All** from the **Copy Seq. #** drop-down list in the Copy Information area of the **Receiving/Marking** dialog box. Click on the **Receive** button. Item records will be automatically created if you have selected in your **Session Preferences** to automatically create an item record when a line item is received from a purchase order. When receiving multiple copies at once, the individual item records are not displayed. Instead, a message displays on the screen to notify you that the item records have been created. You can access the newly-created item records by opening the **Copy Seq. #** drop-down list and selecting one of the copies listed (see illustration below). The Item button appears next to the **Copy Seq. #**; clicking on the Item button gives you access to the item record associated with the selected copy.
 2. To receive only some of the copies ordered, select the appropriate copy from the **Copy Seq. #** drop-down list in the Copy Information area of the **Receiving/Marking** dialog box. Click on the Receive button. An item record is automatically created if you have selected in your **Session Preferences** to automatically create an item record when a line item is received from a purchase order. If you are receiving more than one copy ordered for a single location, but not all of the copies ordered for that location, each copy must be received separately. The **Copy Seq. #** drop-down list does not allow you to select more than one copy from the list (unless you select **All** and receive all copies simultaneously).
 3. Once a line item has been received, the **Copies/Funds** cell on the purchase order will say "Received." Clicking on the ellipsis button within the **Copy Status** cell will bring up the **Line Item: Copy Status** box which tells you not only that the line item has been received, but when it was received, the intended location of the received item, the number of copies ordered and the receipt status of each, and the invoice status (see illustration below). The entire line of the purchase order associated with the received line item changes color. At CUL, we are using blue text on a grey background to indicate a line item that has been completely received. Partially received line items (e.g., not all copies ordered have been received) display as pink text on a white background.
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Receiving Monographic Line Items From A Pending Invoice

Receiving monographic line items from an invoice allows you to accomplish two things at once, i.e., invoicing and receiving. When [building an invoice line item by line item](#), you are given a choice between simply adding a line item to an invoice (called "appending" the line item) without receiving it, or receiving the line item and appending it to the invoice at the same time.

1. If you wish to receive the line item as well append it to the invoice, click on the Receive/Append button in the **Receiving/Marking/Appending to Invoice** dialog box. The line item is appended to the invoice and the status of the item is automatically updated to "Received" on both the invoice and the purchase order.
2. If you are creating an invoice by deriving it from a purchase order, all of the line items from the purchase order are already appended to the invoice. The process of receiving the appended items is similar to receiving line items on a purchase order. Highlight the line item you want to receive and click on the Receive/Mark button on the invoice. The **Receiving/Marking** dialog box displays. To receive the line item, click on the Receive button. The status of the item is automatically updated to "Received" on both the invoice and the purchase order.
3. An item record is automatically created if you have selected in your **Session Preferences** to automatically create an item record when a line item is received from a purchase order. If you have not chosen to automatically create an item record when an item is received from a purchase order, you can manually create an item record for the received item by clicking the Item button beside the **Copy Seq. #** field.