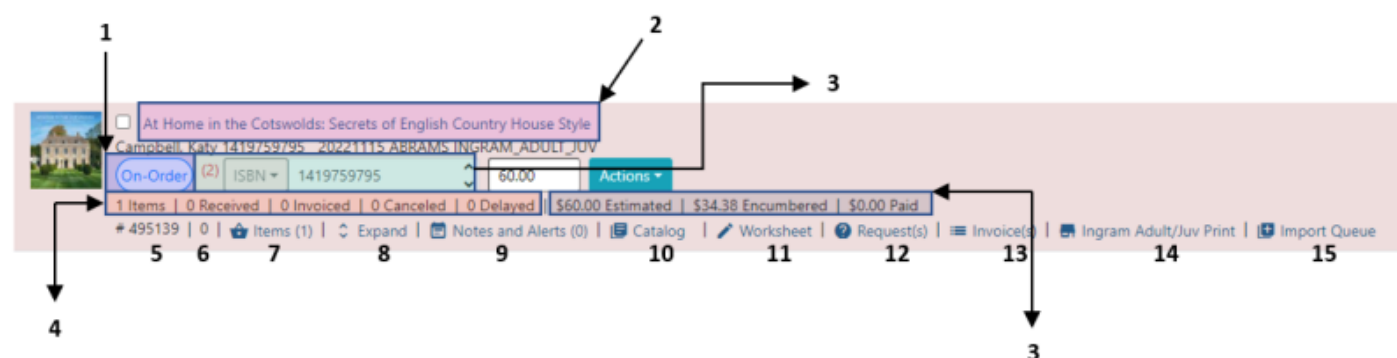


Line Items

Line items are the heart of Acquisitions, and a small bundle to collate many different types of information about the title you're ordering.

Essentially a line item boils down to that it is the representation of a particular title that you're ordering. It then contains more information about that title, including bibliographic information (like the title/author/ISBN), ordering information (like quantity and price), and copy information (like branch and fund used).

Anatomy of a Line Item



1. **Line item status**
2. **Title**
3. Identifier
4. Quantity statuses
5. Line item ID
6. **Existing copies**
7. Items
8. **Expand**
9. **Notes and alerts**
10. **Catalog link**
11. Worksheet
12. Patron requests
13. **Invoices**
14. Provider
15. Import queue

Line item status

Every line item has a status. The status of the line item will change throughout the acquisitions process, as it moves from pending, to ordered, to received. The color of the line item will also change accordingly.

Line item copies also have statuses. The line item status is dependent on the copies beneath it-see the On-Order and Received status details below for examples.

New (light yellow)

☐ A wrinkle in time
Madeleine L'Engle

New (ISBN) Order Identifier... 19.95 Actions

0 Items | 0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$0.00 Estimated | \$0.00 Encumbered | \$0.00 Paid
494765 | 0 | Items (0) | Expand | Notes and Alerts (0) | Link to Catalog | Worksheet | Request(s) | Invoice(s) | For Testing Only

New line items are items that have been added from Actions→Add Brief Record. They are only on pending purchase orders.

Pending (beige)

☐ Body of Evidence (Library)
Hannon, Irene 9780800742188 20221004 Fleming H. Revell Company INGRAM_ADULT_JUV

Pending-Order (2) (ISBN) 9780800742188 29.99 Actions

5 Items | 0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$149.95 Estimated | \$0.00 Encumbered | \$0.00 Paid
480923 | 0 | Items (5) | Expand | Notes and Alerts (0) | Catalog | Worksheet | Request(s) | Invoice(s) | Ingram Adult/Juv Print | Import Queue

Pending line items are any line items that are (1) not in New status, and (2) on a purchase order that hasn't been activated.

On-order (pink)

☐ Fatal Decision: Edith Cavell, World War I Nurse
Arthur, Terri 9781595983541 20141112 Henschelhaus Publishing, Inc. INGRAM_ADULT_JUV

On-Order (2) (ISBN) 9781595983541 24.95 Actions

1 Items | 0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$24.95 Estimated | \$14.97 Encumbered | \$0.00 Paid
488748 | 0 | Items (1) | Expand | Notes and Alerts (0) | Catalog | Worksheet | Request(s) | Invoice(s) | Ingram Adult/Juv Print | Import Queue

On-order line items are the status line items receive once a purchase order has been activated. Line items will stay in on-order status until (1) all copies on the line item have been received, or (2) all copies on the line item have been canceled.

Received (gray)

☐ Hold the Line: The Insurrection and One Cop's Battle for America's Soul
Fanone, Michael 9781668007198 20221011 Atria Books INGRAM_ADULT_JUV

Received (2) (ISBN) 9781668007198 28.00 Actions

7 Items | 7 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$196.00 Estimated | \$112.28 Encumbered | \$0.00 Paid
488744 | 0 | Items (7) | Expand | Notes and Alerts (0) | Catalog | Worksheet | Request(s) | Invoice(s) | Ingram Adult/Juv Print | Import Queue

Received line items have all of their associated copies marked as received. If the copies are only partially received (i.e. at least one is not received), the line item status will stay on-order until all copies are received.

Canceled (white)

☐ I Survived the Wellington Avalanche, 1910
Tarshis, Lauren 9781518264634 B&T

Canceled: By Vendor (2) (ISBN) 9781518264634 13.59 Actions

1 Items | 0 Received | 0 Invoiced | 1 Canceled | 0 Delayed | \$0.00 Estimated | \$0.00 Encumbered | \$0.00 Paid
456696 | 0 | Items (1) | Expand | Notes and Alerts (0) | Catalog | Worksheet | Request(s) | Invoice(s) | Baker and Taylor | Import Queue

A canceled line item is one that all copies on the line item have been marked canceled with a "true" cancel reason. (See: **Cancel/Suspend**) This will also release any encumbrances on these items. Copies

in the catalog are also deleted when this line item is canceled.

Delayed (blue)

Delayed line items have a status of “Canceled” but use a cancel reason that begins with “Delayed”. (See: [Cancel/Suspend](#)) Encumbrances will remain held for these items, since the intention is that you will eventually receive the items. Copies in the catalog also remain.

Title

Beyond just listing the title of the work that you're ordering, clicking on the title of a line item will show MARC information about the work.

Once you click on the title, there are three tabs:

- Attributes
- Marc View
- MARC Edit

Attributes	MARC View	MARC Edit
Identifier	in503069581	
Publication Date	20221115	
Publisher	ABRAMS	
ISBN	1419759795	
ISBN	9781419759796	
Author of work	Campbell, Katy	
Title of work	At Home in the Cotswolds: Secrets of English Country H	
Estimated Price	60.00	
Estimated Price	60.00	
ISBN	1419759795	

Attributes will display the brief record that was in your file that you uploaded from your vendor website. It may be very brief, or it could be more fleshed out depending on the vendor. You cannot edit this information.

Marc View displays the current catalog record (if any) that this line item is linked to. You cannot edit this information.

Marc Edit is an editable display of the brief record that was shown on **Attributes**. If you have not already linked your line item to a catalog record, any changes you make here will be in your catalog

record once you've activated your order. If you do make changes on this screen, be sure to click the green Save Changes button on the far right to save your changes.



If your line item is already linked to a bib record, any changes you make here will not change the record in the catalog. Any changes you make here **will** change information on your line item, regardless if it's linked to a bib record or not.

Identifier

Quantity statuses

Line item ID

Existing copies

This number displays the number of existing copies on the connected bib record that your ordering agency already owns. It does not count deleted, lost, missing or discarded copies, nor does it include the number being ordered on this particular line item.

Items

Expand

For a quick, read-only view of the copies underneath any given line item, you can use Expand to see the information. It will display all of the information you can get by going through [Items](#), but without needing to drill down into another page and then return back to the main PO page. It gives you a quick view of the information, and you can use Items or the [batch updater](#) if you need to edit.

Notes and alerts

Notes and alerts are different ways that we can add order information to a particular line item. See [How to...Add notes and alerts](#) for more information on using line item notes and/or alerts.

Catalog link

This is a link to the current catalog record that your line item is connected to. If you uploaded via Load MARC Order Records, this linking was done automatically for you as part of your upload process. If you uploaded and your line items still say "Link to catalog", then either (1) your upload is still processing, (2)

there was an error with linking that particular line item.

To manually link a line item to a catalog record, see [How to...Link to catalog](#).

Worksheet

Patron requests

Invoices

As your line item moves through the ordering process, you will eventually get to the stage of being invoiced for the items ordered. The Invoices link at the top of your purchase order displays all invoices associated with any line item on this purchase order. If you just want to see the invoice that this particular line item is associated with, you can click this Invoices link and it will display the invoice(s) associated with only this line item.

Provider

Import queue

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Last update: **2023/01/30 18:03**

