

Line Items

Line items are an integral part of the Acquisitions purchasing processing. Line items are a type of order records that are:

- based on the MARC order format
- are not bibliographic records, and
- are reformatted into a workable, compact form

As the line item passes through the acquisitions process, it acquires information and attributes that allow purchasing and tracking. These attributes are characteristics of the bibliographic record, such as ISBN or title, as well as copy information, price, notes, and alerts.

Anatomy of a Line Item

There are three general informational areas of a line item. These include:

- MARC Order Record Area
- Action Area
- Acquisitions Record Tracking Area

LINE ITEM PARTS DIAGRAM

MARC Order Record Area

Bibliographic data contained in the order record displays here; title, author, ISBN / ISSN / UPC, publisher, pub date, price, format, edition, etc.

Action Area

Along with *Line Item Status*, here are links to adding, changing or deleting COPIES, NOTES & ALERTS, and PRICES. Also a dropdown menu of ACTIONS for copies on the order record.

Line Items

	Expand All	Items	Notes	Actions	Status	Estimate Price
	Expand	Copies(2)	Notes(2)	-- Actions --	Received	8.95

8196 | [2](#) | [→ catalog](#) | [→ worksheet](#) | [→ LineitemDemoPENDING2order](#) | [308](#) | [requests](#) | [view invoice\(s\)](#) | claim policy: Damaged Replace | [@ BROff](#) | [→ queue](#)

- 1 Line Item ID
- 2 # of Cataloged Copies
- 3 OPAC link - if not linked appears as [→ link to catalog](#)
- 4 Link to line item worksheet
- 5 Link to Selection List
- 6 Link to Purchase Order
- 7 Link to Patron Requests
- 8 Link to all associated Invoices
- 9 Link to Claim Policy associated with provider
- 10 Link to Provider
- 11 Link to Import Queue

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
STATELIB-L	ACQGPLS2998	ACQGPLS2998	PLSTA-L (2015)	On Order	book		
STATELIB-B	ACQGPLS2997	ACQGPLS2998	PLSTA-B (2015)	On Order	book		

ACQUISITIONS RECORD TRACKING AREA

Lineitem Worksheet

[Return](#)

Title: Oh, the places you'll go! / by Dr. Seuss.
 Author: Seuss,
 Item Count: 2
 Lineitem ID: 8196
 Open Holds: 2
 Distribution Formulas: Both Standard
 Lineitem Notes:

- Patron Request
- do not process

Branch	Barcode	Call Number	Fund	Shelving Location	Recd.	Notes
STATELIB-B	ACQGPLS2997	ACQGPLS2998	PLSTA-B (2015)		2015-06-22T15:15:46-0400	
STATELIB-L	ACQGPLS2998	ACQGPLS2998	PLSTA-L (2015)		2015-06-22T15:15:46-0400	

MARC Order Record Area

This area of the line item primarily provides bibliographic data about the title being ordered and the bibliographic record that the item is attached to. It shows information such as title, author, ISBN/ISSN/UPC, pub date, publisher, format, pagination, edition, and cover art (if available).

Clicking on the title of the line item will reveal a MARC view of the record that is the basis for the line item, and that the acquisitions copies are, or will be, attached to.

Line Items		Expand All	Items	Notes	Actions	Status	Estimated Price
	Oh, the places you'll go! / by Dr. Seuss.						
	Seuss, 9780679905271 c1990. Random House,						
	Order Identifier ISBN 9780679905271						
# 8191 → link to catalog → worksheet requests		Expand	Copies(0)	Notes(0)	-- Actions --	New	

Identifier	82942
Publication Date	c1990.
Publisher	Random House,
ISBN	9780679905271
ISBN	0679905278
ISBN	9780679805274
ISBN	0679805273
Pagination	[48] p. :
Author of work	Seuss,
Title of work	Oh, the places you'll go! / by Dr. Seuss.

MARC Order Record
[Edit MARC Order Record](#)

```

LDR02812cam a2200625 a 4500
001 82942
003 GaAaGPL
005 20120803152052.0
008 890628s1990 nyua j 000 1 eng
010 |1a 89036892
035 |1a (OCoLC)ocm20169007
040 |1a DLC |b eng |c DLC |d BAKER |d XY4 |d BTCTA |d YDXC
019 |1a 43889090 |a 49296123

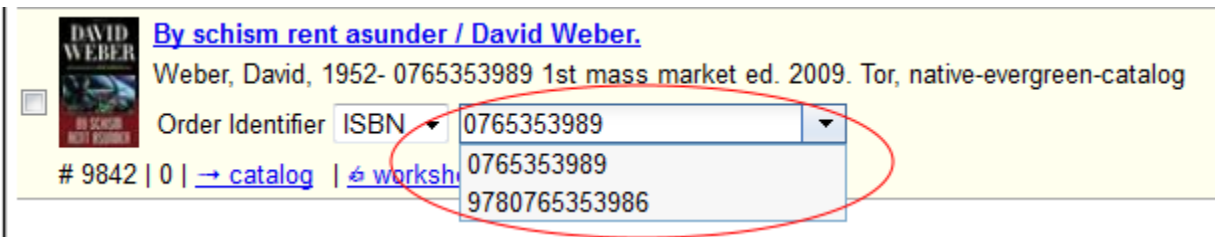
```

Cataloged Copies

This count is the number of copies already owned at or below the ordering agency on the bib record attached to a particular line item. The count does not include copies on the line item nor does it include copies that are in some form of lost, missing, or discard status.

Order Identifier Selector

If line items are created from existing MARC records (such as from MARC files downloaded from vendors), they may have multiple ISBNs, ISSNs, or UPCs attached to the record. Users are able to specify which ISBN, ISSN or UPC to display in the purchase order which will be sent to the providers. Users are also able to add new identifier numbers as needed.



By schism rent asunder / David Weber.
 Weber, David, 1952- 0765353989 1st mass market ed. 2009. Tor, native-evergreen-catalog

Order Identifier ISBN

9842 | 0 | [→ catalog](#) | [↗ worksh](#)

0765353989
9780765353986

This function helps to ensure that the correct edition of an item is ordered.

To choose from the existing values, use the drop down menu. To add an additional identifier, highlight the existing value and type or paste in your new value.

Action Area

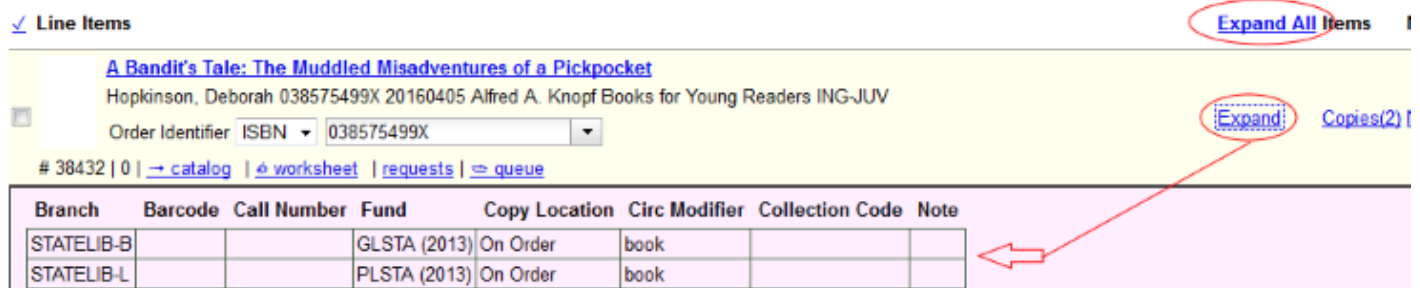
The Action Area is to make modifications or take some sort of action with the line item. In this area you can add, change or delete copy attributes, receive, unreceive and claim copies, add alerts and notes, add prices, add distribution formulas, batch updates, go to holdings maintenance, update barcodes, and view claims and history. The [Line Item Status](#) is also a key component of this area.

Line Item Detailed View

Line items have both a simple and detailed view. The simple view is the default view, and is the view that you are immediately presented with upon viewing a selection list or purchase order that contains line items.

The detailed view is an expanded version of the simple view. If line items have any copies allocated or attached, the detailed view will give information about those copies. This information includes (if available): branch, barcode, call number, fund, copy location, circ modifier, collection code and note.

You may view the detailed (aka “expanded”) view of a single line item or all line items at once. From within a selection list or purchase order click **Expand** to view the detailed view for one line item or **Expand All** to display the view for all line items.



[Line Items](#) [Expand All](#) Items

A Bandit's Tale: The Muddled Misadventures of a Pickpocket
 Hopkinson, Deborah 038575499X 20160405 Alfred A. Knopf Books for Young Readers ING-JUV

Order Identifier ISBN

38432 | 0 | [→ catalog](#) | [↗ worksheet](#) | [requests](#) | [queue](#)

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
STATELIB-B			GLSTA (2013)	On Order	book		
STATELIB-L			PLSTA (2013)	On Order	book		

[Expand](#) Copies(2) 1

Clicking *Expand* or *Expand All* a second time will close the detailed view.

Add a Copy

Use the *Copies* link to add copy information to a line item. You can add copies to line items on a selection list or a pending purchase order.

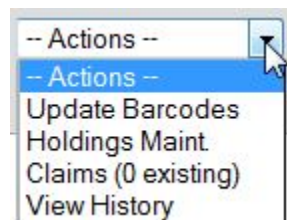
Add a Note

Use the *Notes* link to add a note to a line item. Notes on line items can include any additional information that you wish to add to a line item. Notes can be internal or can be made available to providers. Notes also display on the Line Item Worksheet for the item.

Add an Alert

Use the *Notes* link to add Alerts to a line item. Alerts are pop-up messages that appear when an item is received. Alerts also display on the Line Item Worksheet for the item.

Line Item Actions Menu



The line item Actions menu provides you with a number of functions that can be applied to a particular line item.

1. Update barcode - You are only able to update barcodes once a line item has been received.
2. Holdings Maintenance - Once an item has been received it is possible to use the Actions menu to go directly to Holdings Maintenance to view and edit the holdings for a line item.
3. Claims - You can manually claim a copy any time after it has been ordered until it is received. You can also claim copies that have been suspended. Claim policies are associated with the provider.
4. View History - It is possible to view the changes that have been made to a line item. By default the newest changes appear first.

Lineitem History

[Back](#) [Next](#) [Filter](#)

✓	#	Audit Time	State	Selection List	Purchase Order	Provider	Estimated Unit Price	Claim Policy	Create Time	Edit Time	Creator	Editor	Selector	Cancel Reason	Evergreen Bib ID	Expected Receive Time	Queued Vandalay Record
<input type="checkbox"/>	1	7/27/15 11:16 AM	on-order	LineitemDemo	306	BROft	8.95	Damaged Replace	6/22/15 2:53 PM	7/9/15 8:39 PM	3762437	3762437	3762437		82942		229498
<input type="checkbox"/>	2	7/9/15 8:39 PM	received	LineitemDemo	306	BROft	8.95	Damaged Replace	6/22/15 2:53 PM	6/22/15 3:15 PM	3762437	3762437	3762437		82942		229498
<input type="checkbox"/>	3	6/22/15 3:15 PM	on-order	LineitemDemo	306	BROft	8.95	Damaged Replace	6/22/15 2:53 PM	6/22/15 3:15 PM	3762437	3762437	3762437		82942		229498
<input type="checkbox"/>	4	6/22/15 3:15 PM	on-order	LineitemDemo	306	BROft	8.95	Damaged Replace	6/22/15 2:53 PM	6/22/15 3:10 PM	3762437	3762437	3762437		82942		229498
<input type="checkbox"/>	5	6/22/15 3:10 PM	pending-order	LineitemDemo	306	BROft	8.95		6/22/15 2:53 PM	6/22/15 2:57 PM	3762437	3762437	3762437		82942		229498
<input type="checkbox"/>	6	6/22/15 3:09 PM	pending-order	LineitemDemo	306	BROft	8.95		6/22/15 2:53 PM	6/22/15 2:57 PM	3762437	3762437	3762437				229498
<input type="checkbox"/>	7	6/22/15 3:09 PM	pending-order	LineitemDemo	306	BROft	8.95		6/22/15 2:53 PM	6/22/15 2:57 PM	3762437	3762437	3762437				
<input type="checkbox"/>	8	6/22/15 2:57 PM	new	LineitemDemo			8.95		6/22/15 2:53 PM	6/22/15 2:56 PM	3762437	3762437	3762437				
<input type="checkbox"/>	9	6/22/15 2:56 PM	new	LineitemDemo					6/22/15 2:53 PM	6/22/15 2:53 PM	3762437	3762437	3762437				

Line Item Statuses

The status of a line item displays to the right of the Actions menu.



While there is some overlap in naming, **line item** statuses and **item** statuses are not the same thing.

The line item bar changes color depending on the status of a line item. The colors that display may vary depending on your screen resolution. Possible statuses are:

- New (Off-white): Item is newly added to the acquisitions process

Line Items

Expand All Items

Notes

Actions

Status

Estimate Price

Silas Marner : the weaver of Raveloe.

Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog

Order Identifier ISBN 1419848739

Expand

Copies(0) Notes(0)

-- Actions --

new

44061

→ catalog

↗ worksheet

requests

- * Selector-ready (light pink): Item has been chosen and is waiting for a selector to approve

Line Items

Expand All Items

Notes

Actions

Status

Estimate Price

Silas Marner : the weaver of Raveloe.

Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog

Order Identifier ISBN 1419848739

Expand

Copies(0) Notes(0)

-- Actions --

selector-ready 12.45

44061

→ catalog

↗ worksheet

requests

- order-ready (periwinkle): Item is ready to be ordered

Line Items

Expand All Items

Notes

Actions

Status

Estimate Price

Silas Marner : the weaver of Raveloe.

Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog

Order Identifier ISBN 1419848739

Expand

Copies(0) Notes(0)

-- Actions --

order-ready 12.45

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→ catalog

↗ worksheet

requests

- pending-order (gray): Item is part of a purchase order that has not yet been activated

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 Silas Marner : the weaver of Raveloe. Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog Order Identifier ISBN 1419848739	Expand	Copies(1)	Notes(0)	-- Actions --	pending-order	12.45
# 44061 → catalog 📄 worksheet 📌 Classics requests view invoice(s)						

- on-order (mauve): Item is currently on-order

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 Silas Marner : the weaver of Raveloe. Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog Order Identifier ISBN 1419848739	Expand	Copies(1)	Notes(0)	-- Actions --	on-order	12.45
# 44061 → catalog 📄 worksheet 📌 Classics requests view invoice(s)						

- received (gray blue): Item has been received by the library.

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 Silas Marner : the weaver of Raveloe. Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog Order Identifier ISBN 1419848739	Expand	Copies(1)	Notes(0)	-- Actions --	received	12.45
# 44061 → catalog 📄 worksheet 📌 Classics requests view invoice(s)						

- canceled (white): Item has been canceled.

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 Silas Marner : the weaver of Raveloe. Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog Duplicate order Order Identifier ISBN 1419848739	Expand	Copies(1)	Notes(0)	-- Actions --	canceled	12.45
# 79199 → catalog 📄 worksheet 📌 Classics requests view invoice(s)						

- delayed (blue): Item has been “canceled” but debits remain as the item is really delayed

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 Silas Marner : the weaver of Raveloe. Eliot, George, 1819-1880. 1419848739 native-evergreen-catalog Backordered Order Identifier ISBN 1419848739	Expand	Copies(1)	Notes(0)	-- Actions --	canceled	12.45
# 79195 → catalog 📄 worksheet 📌 Classics requests view invoice(s)						

Estimated Price

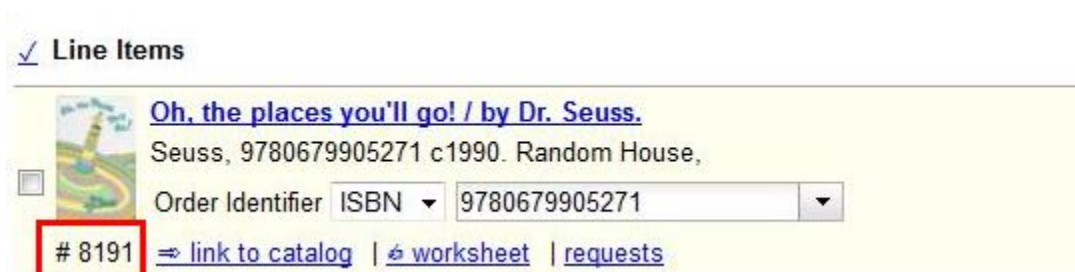
The final column of a line item is *Estimated Price*. A purchase order will not activate without the Estimated Price field filled in for each line item. The price entered into Estimated Price is the amount that will be encumbered for the item. It is also the amount that will appear in the price field of the copy editor for all copies created from this line item.

Acquisitions Record Tracking Area


This is the area of an Item Record that acquires links to the key acquisitions processes as the line item record passes through purchasing, becoming the complete record that links all its component parts: the catalog, selection list, purchase order, invoices, provider, import queue and more.

Line Item ID

Each line item is assigned and retains an ID number throughout the process. The Line Item ID is displayed beneath the art work and is the first item on the record tracking line.



✓ Line Items

 [Oh, the places you'll go! / by Dr. Seuss.](#)
Seuss, 9780679905271 c1990. Random House,

Order Identifier ISBN 9780679905271

8191 [link to catalog](#) | [worksheet](#) | [requests](#)

Number of Cataloged Copies

In the select list and the PO view interfaces, beside the line item ID #, the number of catalog copies already owned at or below the ordering agency for the bib record in question is displayed. The count does not include copies linked to the line item in question nor does it include copies that are in some form of lost, missing, or discard status.

Link Line Items to the Catalog

You can link a line item on a selection list to a corresponding MARC record in the catalog. The *link to catalog* option enables you to search for a matching record and link the line item to it. The catalog record replaces the record originally used to create the line item. When bibliographic records and copies are loaded into the catalog, the copies are attached to the linked record in the catalog. When "Import Bibs and Copies" is used, the copies are attached to the linked record in the catalog.

See [Link a line item to the catalog](#) for how to do this.

Line Item Worksheet

The Line Item Worksheet is designed to be a printable sheet that contains details about the line item, including alerts, notes, number of holds, and distribution information. The system fills in the worksheet as a line item goes through the acquisitions process.

Selection List Link

The selection list link is created once the line item becomes part of a list. The line item can be linked to a single list.

Purchase Order Link

The link to the purchase order is created once the line item is converted to a purchase order.

Patron Requests Link

PINES is not currently using the Patron Requests feature, but this link will continue to appear.

Invoices link

Use the Invoices link to view all the invoices this line item and its copies may be linked to.

Claim Policies

Claim policies are manual. This information is the title of the claim policy that is supplied from the provider record. Claims can be initiated from the Actions dropdown menu in the Action Area of the line item.

Provider link

The Provider link will reveal the Provider's record.

Import Queue link

The link to the record's import queue is created when bibs and copies are created either when importing order records, upon creation of the purchase order or activation of the purchase order.

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