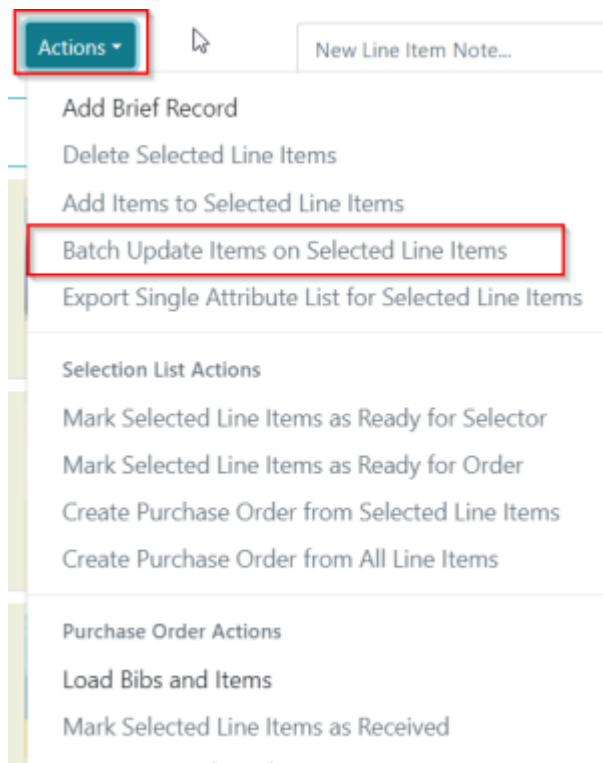


# Line Items: How-To...

## Use the batch updater

The batch updater is the way that we can add specific pieces of information to multiple copies at one time.

If you want to apply a specific attribute to multiple line items (and their copies) at once. That's located in **Actions→Batch Update Items on Selected Line Items**.



The main thing to remember about the batch updater is that it **REPLACES** values, it doesn't add onto.

So if you have 1 copy on a line item with no circ mod, and you use the batch updater to add a circ mod it is *replacing* the previous value of nothing with the value of book/av/whatever. It will not *add* another copy with a different circ mod.

And if you have a value that already exists (e.g. like a fund) it will overwrite what is there already.

## Required Fields

When you're adding attributes (branch/fund/etc) to your line items, there are a few fields that have required values to use vs. what you might normally use locally.

### Shelving Location

Shelving location should always be left BLANK. There is a PINES-level setting that will apply the correct ON ORDER shelving location once you have submitted your orders.

### Circulation modifier

Circulation modifier should always be left BLANK. There is a PINES-level setting that will apply the correct circ modifier once you have submitted your orders.

## Cancel/Suspend

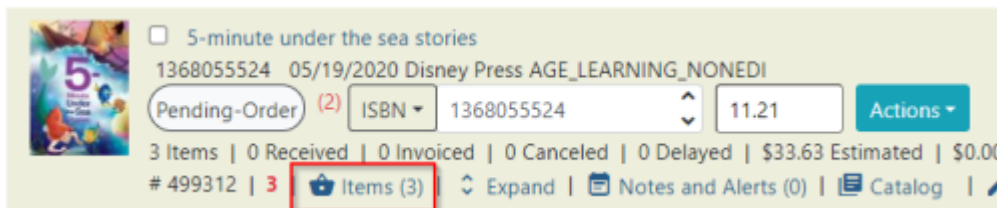
See [Cancel/Suspend](#)

## Receive/Unreceive

See [Receive/Un-Receive](#)

## Add Copies

While your purchase order is still in Pending status, you're able to add and remove copies from line items. You can see if a line item already has a quantity set by looking at the Items link on the line item.



If you use 9xx tags in your downloaded vendor carts, your line items might start out with quantities already auto-populated from your vendor carts. There are three different ways to add copies onto your line items:

1. The [PO-level batch updater](#)
2. The [Items Detail Area](#)

### 3. The PO-level **Add Items Updater**

Which of these methods you use depends on what information you already have and what you're trying to enter.

#### Use the PO-level batch updater when:

- You want to update just one (or more) fields on multiple line items, with the same value for each

#### Use the Items detail area when:

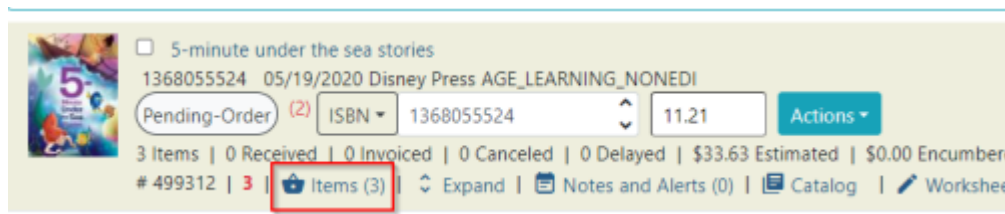
- You need to apply different information to different line items (EX: not all line items have the same branch)
- You have multiple copies on one line item and they need different information per copy (EX: 1 copy for BranchA with BranchA-Adult fund, 1 copy for BranchB with BranchB-Adult fund, etc)

#### Use the PO Add Items Updater when:

- You want to create additional copies to one or more line items, where the same information will be applied to them all

## Items Detail Area

To access the Items Detail area of a line item, you can click on the **Items** link on an individual line item.



Here you'll see fields that you can update for this particular line item. You'll also notice there is a batch updater here, if you are applying the same value across all your copies on this line item.

Items for Line Item 499312 (5-minute under the sea stories)

Item Count:   | Distribution Formulas

Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode
<input type="text" value="Owning Branch..."/>	<input type="text" value="Shelving Location..."/>	<input type="text" value="Collection Code..."/>	<input type="text" value="Fund..."/>	<input type="text" value="Circ Modifier..."/>	<input type="text" value="Call Number..."/>	<input type="text" value="Barcode..."/>
<input type="button" value="Batch Update"/>						
Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode
1 LOPL-SP	AUDIO MP3 (LOPL-IS)	<input type="text" value="Collection Code..."/>	<input type="text" value="Fund..."/>	High Demand	<input type="text" value="Call Number..."/>	<input type="text" value="Barcode..."/>
2 LOPL-SW	AUDIO MP3 (LOPL-IS)	<input type="text" value="Collection Code..."/>	FOR-TESTING-ONLY (2023)	High Demand	<input type="text" value="Call Number..."/>	<input type="text" value="Barcode..."/>
3 LOPL-IS	AUDIO MP3 (LOPL-IS)	<input type="text" value="Collection Code..."/>	FOR-TESTING-ONLY (2023)	High Demand	<input type="text" value="Call Number..."/>	<input type="text" value="Barcode..."/>

You can change any of these fields individually (like branch or fund).



Do NOT add values to the Call Number or Barcode fields. These will be supplied



automatically by Evergreen when you activate your order.

If you need to add more copies to this particular line item, you can change the number in the Item Count box and click Apply, and it will add more lines below.

Items for Line Item 499312 (5-minute under the sea stories)

Item Count:   | Distribution Formulas

Owning Branch	Shelving Location	Collection Code	Fund

If you need to take away any lines, you can click the red trash can next to any line to delete it.

Once you've made all of your changes, be sure to click the green **Save Changes** button on the far right, otherwise you'll lose all your edits.

Items for Line Item 499312 (5-minute under the sea stories)

Item Count:   | Distribution Formulas

Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	
Owning Branch...	Shelving Location...	Collection Code...	Fund...	Circ Modifier...	Call Number...	<input type="button" value="Batch Update"/>

Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode	
							<input type="button" value="Batch Update"/>

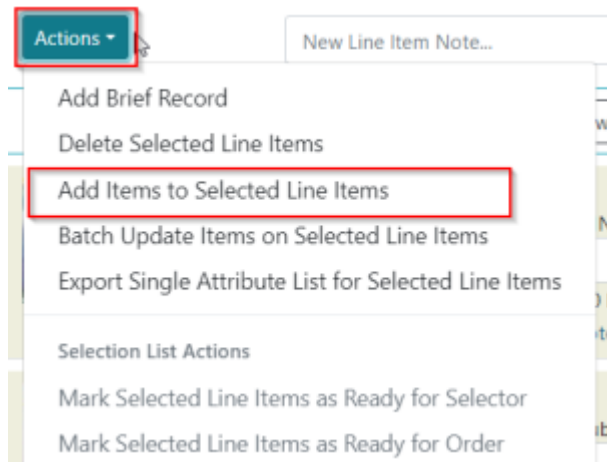
## Add Items Updater

The Add Items Updater is most useful when you're trying to **add** copies to multiple line items at once, with the same info across all of them.

So if you have line items with no quantity, you could use the Add Items updater to add 1 quantity (plus other attributes like branch/fund/etc) to your line items. In this circumstance, the regular batch updater would do the same thing because replacing 0 with 1 still makes 1.

However, it differs when you already have quantities set. So if you have line items with 2 copies already and you use the Add Items updater with a quantity set of 1, you would update those line items to have a quantity of 3.

The Add Items updater can be found through **Actions→Add Items to Selected Line Items**.



You'll notice that here we have another batch updater, simply to make it easier if you're working with multiple copies that you're wanting to add.

A screenshot of a dialog box titled 'Add Items to Selected Line Items'. At the top, it says 'Line Item(s) selected: 499312'. Below this, there is a section for 'Item Count' with a text input box containing the number '1', an 'Apply' button, and a 'Distribution Formulas' dropdown menu. Below this is a table with columns: 'Owning Branch', 'Shelving Location', 'Collection Code', 'Fund', and 'Circ Modifier'. The table has one row with the following values: 'FRRLS-PT', 'Shelving Location...', 'Collection Code...', 'Fund...', and 'Circ Modifier...'. To the right of the table is a 'Batch Update' button. At the bottom right of the dialog are 'Apply' and 'Exit Dialog' buttons.

When using the Add Items updater, the Item Count box is particularly important since that's how many copies it's going to add onto your selected line items. It will default to one.

A screenshot of the same 'Add Items to Selected Line Items' dialog box, but with a focus on the 'Item Count' input box. The box is highlighted with a red rectangular box, and it contains the number '1'. The rest of the dialog box is visible but slightly blurred.

Once you've entered the correct quantity that should be added, you'll want to make sure your changes show in the lines below the batch updater.

Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	
<input type="text" value="Owning Branch..."/>	<input type="text" value="Shelving Location..."/>	<input type="text" value="Collection Code..."/>	<input type="text" value="Fund..."/>	<input type="text" value="Circ Modifier..."/>	<input type="button" value="Batch Update"/>
1	<input type="text" value="LOPL-BULL"/>	<input type="text" value="Shelving Location..."/>	<input type="text" value="Collection Code..."/>	<input type="text" value="Fund..."/>	<input type="text" value="Circ Modifier..."/>
2	<input type="text" value="LOPL-BULL"/>	<input type="text" value="Shelving Location..."/>	<input type="text" value="Collection Code..."/>	<input type="text" value="Fund..."/>	<input type="text" value="Circ Modifier..."/>

Since this time we're adding completely new copies, you'll want to fill out all the information that should be on the copy, including: Correct branch, fund, and circ modifier (if you use on-order holds).

Then you can click the green Apply button, and those copies will be added to the line items you selected.

## Link to catalog

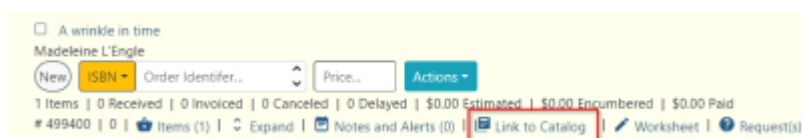
When you do your uploads through Load MARC Order Records, the piece of the upload process that takes the longest is that Evergreen looks at each title in your cart and then checks against our current catalog to see if there's a matching record. If there is, it links that line item to it and then goes to the next title. If there's no match, it creates one and then goes to the next title.

So this process of linking to catalog records is primarily done by your uploads. But there are circumstances where you'll need to manually link one of your line items to a catalog record.



This does not apply if your entire PO has line items that say "link to catalog." In that case either your upload isn't complete, or there was an error with it. Either wait for your upload to finish, or try your upload again.

1. Open your purchase order with the line item.
2. On the line item, click "Link to catalog."



3. You'll get a popup that includes information about the line item, like its title, author, and the identifier number if it has one.

Link Line Item to Catalog

Line Item: 499400

Search catalog for title:A wrinkle in time author:Madeleine L'Engle

Search results

#### 4. Click Submit.

Basically this is going to do a search of the catalog, so think of it in a similar way as if you were doing a search yourself. If these search terms don't end up getting you an appropriate record, you can add/delete information. EX: If including the ISBN means you don't get results, delete the ISBN:XXXX part of the field.

5. You'll get results in a list of possible record matches. You can use the white **View Marc** button for the record to pop out to the right so you can decide if it's a good match for your title you're ordering.

Link Line Item to Catalog

Line Item: 499400

Search catalog for title:A wrinkle in time author:Madeleine L'Engle

Submit

Search results

<a href="#">Link</a>	<a href="#">View MARC</a>	Record 5738907: A wrinkle in time L'Engle, Madeleine. 9781451743234,9781250004673 (pbk.),1250004675 (pbk.) 2012 New York : Square Fish/Farrar Straus Giroux, 2012.	<b>MARC Display</b>
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 4227390: A wrinkle in time L'Engle, Madeleine 9781439518151,0756980135,1439518157,9780312367558 (pbk.),0312367554 (pbk.) ;9780756980139 2007 New York : Farrar, Straus, and Giroux, 2007, c1962.	LDR 02374cam a2200553la 4500
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 5135770: A wrinkle in time L'Engle, Madeleine 0739375695,9780739375693 2006 [Solon, Ohio] : Playaway Digital Audio : [Manufactured and distributed by] Findaway World, LLC, [released 2006], c2007.	001 5738907
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 2474724: A wrinkle in time L'Engle, Madeleine 0307246302 : 2005 New York : Random House/Listening Library, p2005.	003 GaAaGPL
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 5039246: A wrinkle in time L'Engle, Madeleine 9780739331781,0739331787 2005 New York : Listening Library, [2005], p1993.	005 20160804184630.0
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 2568739: A wrinkle in time L'Engle, Madeleine 0786273356 (softcover : alk. paper) 2005 Waterville, Me. : Thorndike Press, 2005.	008 140603r20121962nyua c 000 1 eng
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 2494859: A wrinkle in time L'Engle, Madeleine 0440498058,9780440498056 2005 New York : Yearling, c2005.	010 2014381798
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 2002001: A wrinkle in time L'Engle, Madeleine 0440228395 1999 New York, N.Y. : Bantam Doubleday Dell Books for Young Readers, 1999.	019 809133664
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 711247: A wrinkle in time L'Engle, Madeleine 9780783883717 (hardcover : lg. print : alk. paper),0783883714 (hardcover : lg. print : alk. paper) 1998 Thorndike, Me. : G.K. Hall, 1998.	020 9781250004673 (pbk.)
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 5749182: A wrinkle in time L'Engle, Madeleine. 0440227151,9780440227151 1998 Livonia, Mich. : Seedlings, 1998.	020 1250004675 (pbk.)
<a href="#">Link</a>	<a href="#">View MARC</a>	Record 2140892: A wrinkle in time L'Engle, Madeleine 0965846844 (pbk.) 1962 New York, N.Y. : Quality Paperback Book Club, 1997, c1962.	020 9781451743234
			035 (OCoLC)ocn721900910
			035 (OCoLC)721900910 fz (OCoLC)809133664
			040 DLC eng c DLC BTCTA YDXCP NYP BDX AZFX8 TAC OCLCF AU@ OCLCO
			042 1cac pcc
			050 00 PZ7.L5385 B Wr 2012
			082 00 Fic f2 23
			100 1 L'Engle, Madeleine. (GaAaGPL)56600
			245 12 A wrinkle in time / Madeleine L'Engle.
			250 First Square Fish fiftieth anniversary edition.
			264 1 New York : Square Fish/Farrar Straus Giroux, 2012.
			300 236 pages : illustrations ; 21 cm
			336 text txt rdacontent
			337 unmediated bn f2 rdamedia
			338 volume bn nc f2 rdacarrier

This is the record that your acquisitions copies will be attached to once you order, so make sure that it's representative of the title that you're ordering as best as you can.

6. Once you've decided which record is the best, click the green **Link** button next to that record. The popup will disappear, your PO will reload, and your line item is now linked to that catalog record.

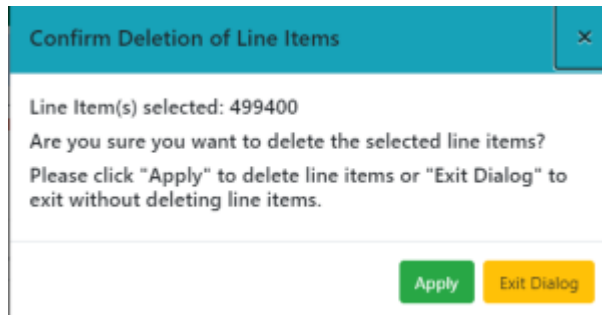
## Delete a line item

1. Open your purchase order.

2. Check the boxes of the line item(s) that you want to delete. You can either select specific line items, or use the **Line Items in Page** or **All Line Items** checkboxes.

3. In the actions menu, select **Actions→Delete Selected Items**.

4. You'll get a confirmation box to confirm that you want to delete the selected line items. Primarily you'll want to make sure that (a) you are intending to delete these line items and you didn't choose this on accident, and (b) that the expected number of line items are showing. That is, if you intended to delete one and it shows you have 20 selected, you should Exit.



A confirmation dialog box titled "Confirm Deletion of Line Items" with a close button (X) in the top right corner. The text inside reads: "Line Item(s) selected: 499400", "Are you sure you want to delete the selected line items?", and "Please click 'Apply' to delete line items or 'Exit Dialog' to exit without deleting line items." At the bottom right, there are two buttons: a green "Apply" button and a yellow "Exit Dialog" button.

## Add notes and alerts

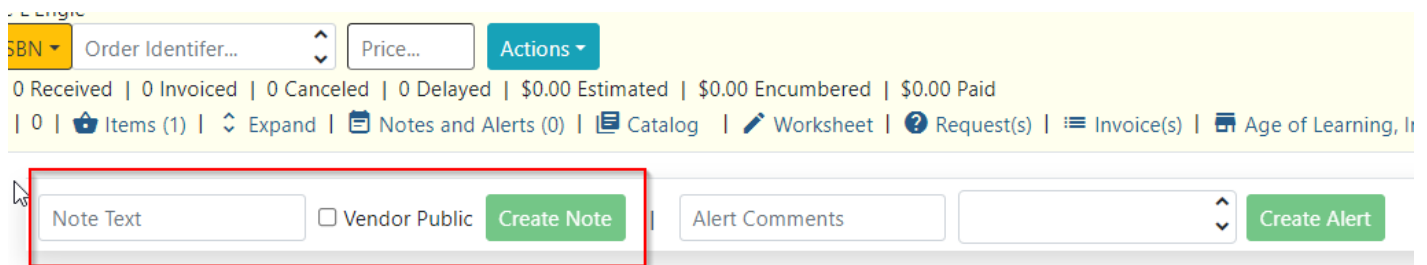
### Notes

You can add an informational note to all or specific line items. This could be a note for yourself for later, a note for someone receiving the item, or you can make a particular note vendor-public to send to a vendor in an EDI order.

#### To add a note to one line item:

1. On the line item that you want the note to apply to, click **Notes and Alerts**.

2. You'll see an area dropdown where you can enter both Notes and Alerts. Notes is on the left. Enter your Note text.



The interface shows a header bar with "SBN" dropdown, "Order Identifier..." dropdown, "Price..." input, and "Actions" dropdown. Below this is a summary bar: "0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$0.00 Estimated | \$0.00 Encumbered | \$0.00 Paid". A navigation bar contains: "0 | 📁 Items (1) | ⌵ Expand | 📅 Notes and Alerts (0) | 📖 Catalog | ✎ Worksheet | ? Request(s) | 📄 Invoice(s) | 📅 Age of Learning, I". The main area has two sections. The first section, "Note Text", is highlighted with a red box and contains a text input field, a "Vendor Public" checkbox, and a green "Create Note" button. The second section, "Alert Comments", contains a text input field and a green "Create Alert" button.

3. If you want the note to be passed to the vendor in your EDI order, click the "Note is vendor-public" ticky box.



Don't use this option unless you know it has already been set up to send via EDI by the PINES Acquisitions Specialist.



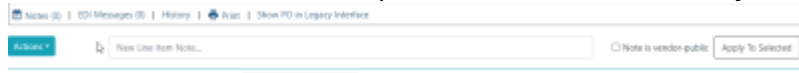
4. Click the green **Create Note** button.

5. You'll now see the counter by your line item's **Notes and Alerts** has gone up, and you can see your Note text below.

### To add a note to one or more line items:

1. Select the line items that you want the note to be applied to.

2. The Note field is at the top of the PO. You can enter your note text in the main field.



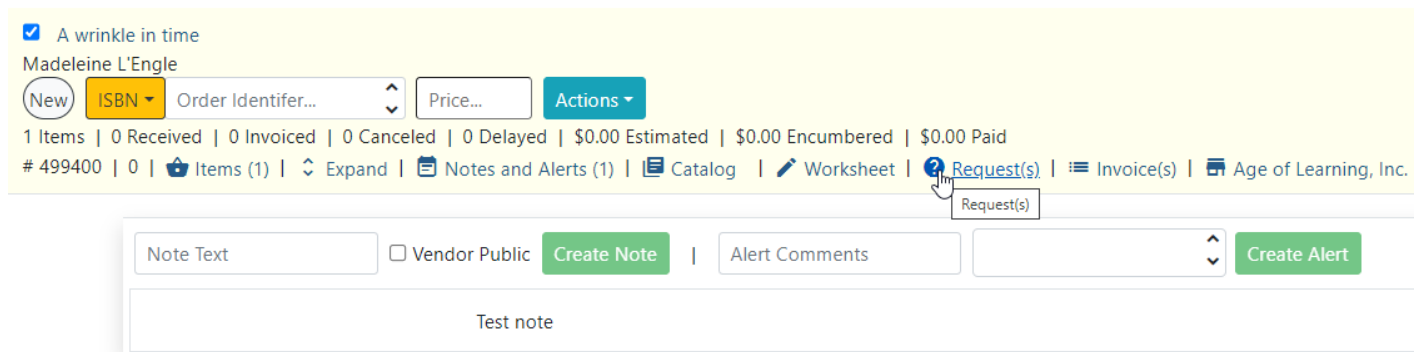
3. If you want the note to be passed to the vendor in your EDI order, click the “Note is vendor-public” ticky box.



Don't use this option unless you know it has already been set up to send via EDI by the PINES Acquisitions Specialist.

4. Click **Apply to Selected**.

5. Your PO will reload, and you'll notice that the counter next to **Notes and Alerts** on your line item has gone up. You can click that to see your note.



To close the Notes and Alerts area, click the red X on the far right.

## Alerts

Alerts are pre-defined messages that can popup whenever a line item is received. Alerts are set up by either PINES or your local ACQAdmin. See: [Line Item Alerts](#).



Alerts can only be added to line items while the purchase order is still pending. If you add



them after it's activated, they won't pop up when the item is received.

### To add an alert to a line item:

1. Open your purchase order.
2. On the line item that you want to add the alert, click the **Notes and Alerts**.
3. The area for Alerts is on the right. Click in the dropdown first to select which type of alert it is.

Note Text ☐ Vendor Public  | Alert Comments

HOLD  
PATRON HOLD

4. You can add comments in the Alert Comments field if you wish.
5. Click the green **Create Alert** button.
6. You'll now see your alert below.

To close the Notes and Alerts box, click the red X on the far right.

You can now see that your line item has a little red flag next to Notes and Alerts to indicate that there's an alert on this line item.

☒ A wrinkle in time  
Madeleine L'Engle  
New ISBN Order Identifier... Price... Actions  
1 Items | 0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$0.00 Estimated | \$0.00  
# 499400 | 0 | Items (1) | Expand | Notes and Alerts (1) | Catalog

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