Line Items: How To...

Link an item 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 Import Bibs and Copies is used, the copies are attached to the linked record in the catalog.

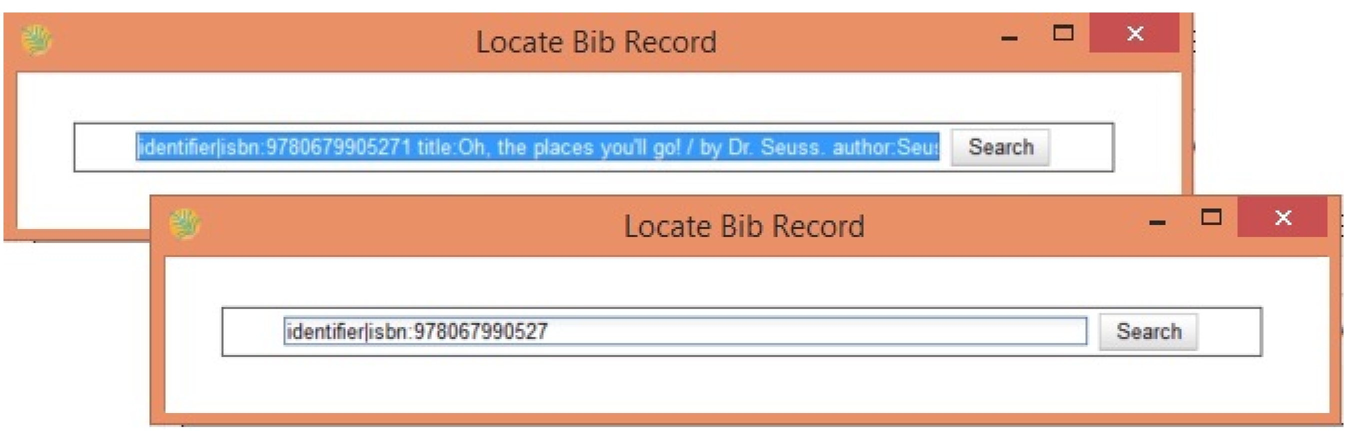
1. Open a selection list or purchase order.

2. On the line item you would like to link, click *link to catalog.*

3. The *Locate Bib Record* search box will open in a new tab or window, depending on your browser choices.

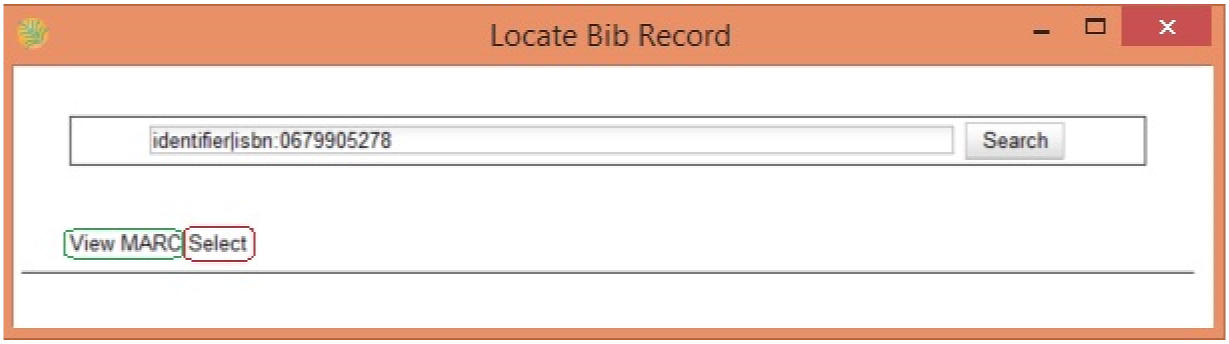
4. By default the search box contains the item's ISBN, title, and author. Adjust your search terms as necessary.Use of a single search term is the most fruitful method of locating an existing bib record. You should begin by deleting all search terms except the ISBN.

If you need to search by an uncommon term, such as TCN, delete all terms in the box and write: Identifier|tcn:xxxx.



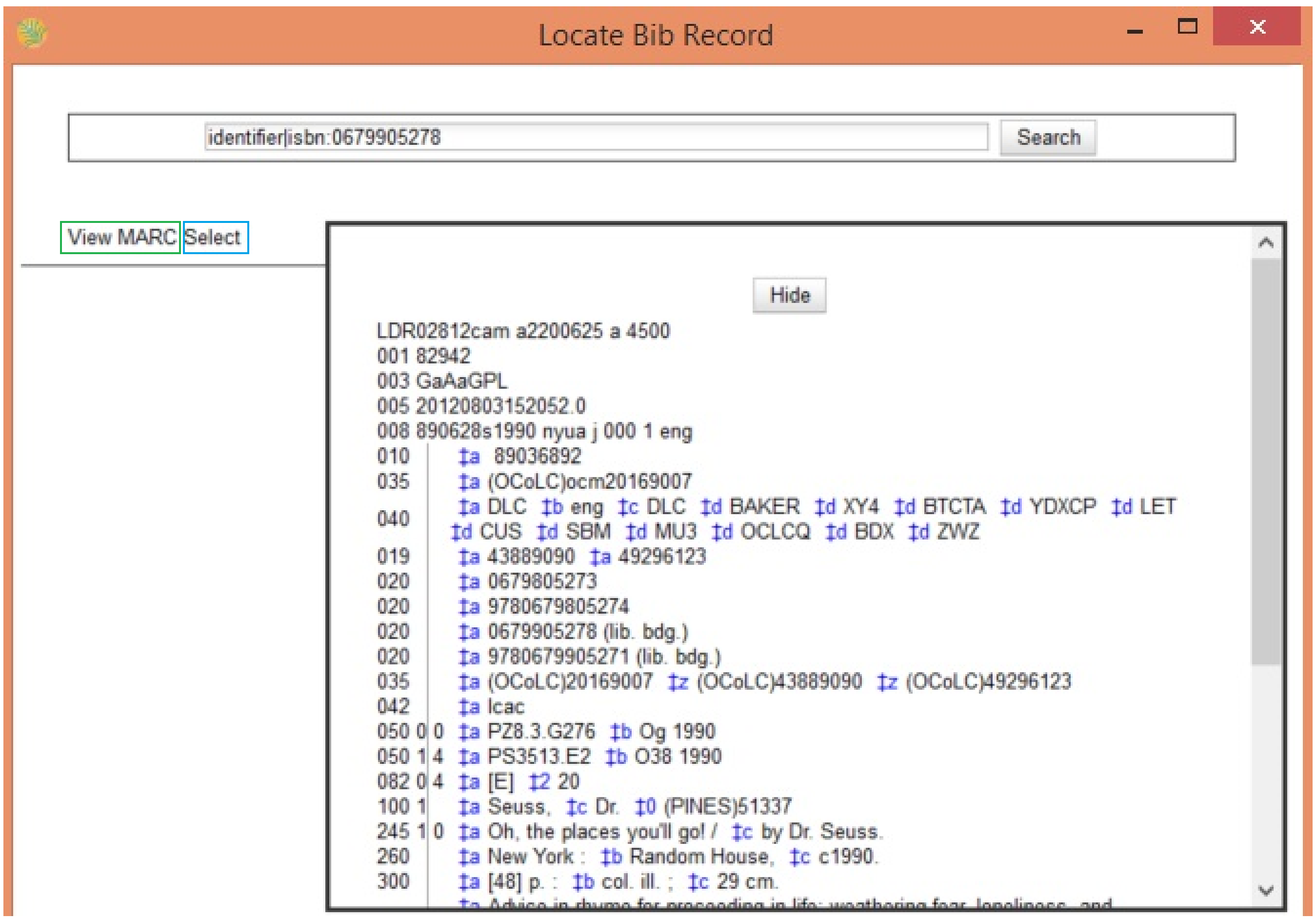
5. Click *Search.*

6. If there are results, *View MARC Select* appears. Although they appear on the same line together, View MARC and Select are two separate functions. *View MARC* allows you to view the MARC record that is your search result; and *Select* allows you to link the record found with the line item.



If there are no results, you will return to the search screen.

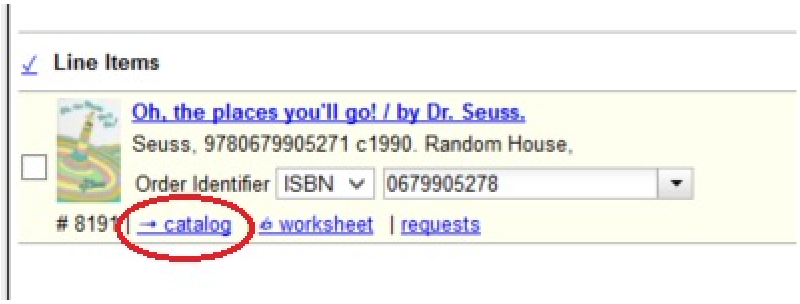
7. Click *View MARC* to view the MARC record of your selection. Click *Hide* to hide the MARC record.



8. If you are satisfied that the record is for the same item, click *Select* to link it to the record on the selection list or purchase order.

9. The screen will reload and the line item will display with a *catalog* link.

The line item is now linked to the MARC record in the catalog. This is the record that the holdings will attach to when you Load Bibs & Copies into the catalog.



If you are activating an order and loading bibs and copies (by hitting Activate or Actions→Load Bibs and Items) you **<fc #ff0000>cannot</fc>** have ANY line items that say “link to catalog.” They must all show as “catalog.” If they do not your order will not activate and/or all of your bibs and copies may not be loaded.

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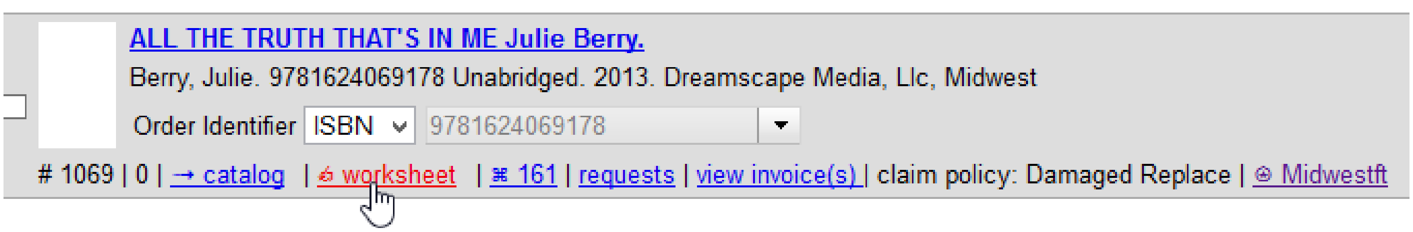
Use the Line Item Worksheet

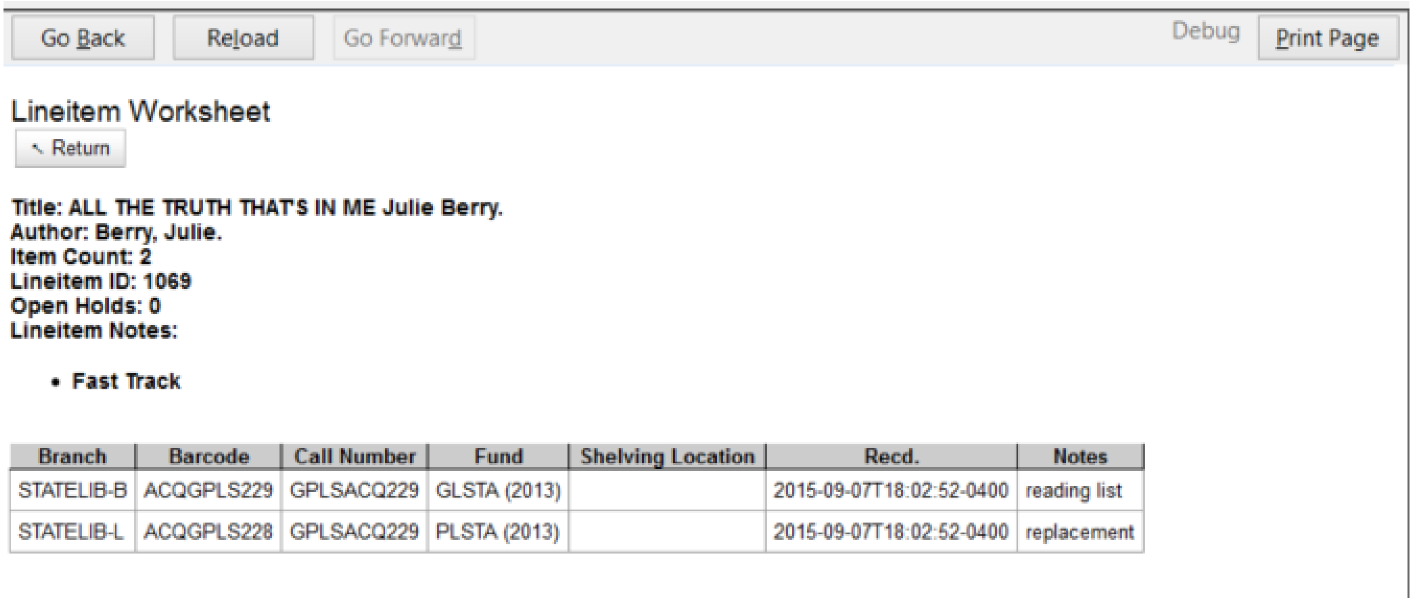
The Line Item Worksheet is designed to be a printable sheet that contains details about the line item, including alerts, notes, number of holds, and distribution information. The system fills in the worksheet as a line item goes through the acquisitions process. This worksheet can be placed in an item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

1. Open a selection list or purchase order.

2. Click the *worksheet* link on the line item for which you would like to view the worksheet.



3. The line item worksheet will appear.



4. The worksheet can be printed by clicking *Print Page* in the top right hand corner.

5. When you are finished, click *Return* to return to your selection list or purchase order.

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Add a copy to a line item

By default, line items have no copies attached to them. If a default for the number of copies has been specified for the provider in the **provider record**, then when line items are added to a purchase order the default number of copies is automatically added to each line item.

> If you use the 962 holdings tag with your MARC imports to include quantity, you may also start out with copy quantities.

You are able to add copies to line items on a selection list or a purchase order that has a *Pending* status.

> Copies should never be added once a purchase order has been activated.

You can see how many copies are assigned on a line item via the Copies link.

Copies can be added to line items in two ways:

- Via the **Line Item Batch Updater** on a purchase order
- Via the Copies link on a selection list or purchase order

The method that you use to add copies will depend on what you're trying to do with the items.

Use the batch updater when:

- You want to add just 1 copy to each line item OR
- You want to add multiple copies on one line item that all use the same branch AND fund
- You are using **Distribution Formulas** to add multiple copies with different branches and/or funds

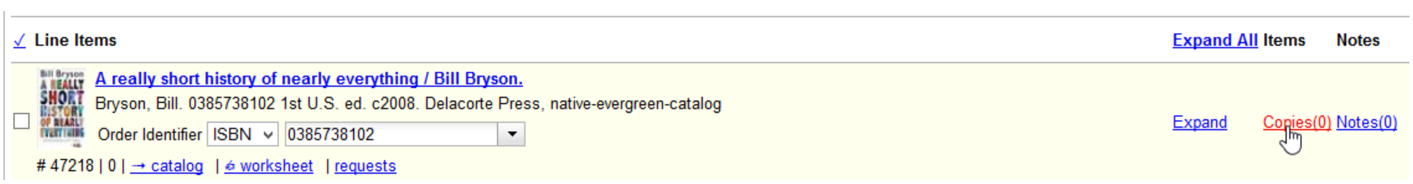
Use the Copies link when:

- You need to add more than one copy on a particular line item that use different branches and/or funds

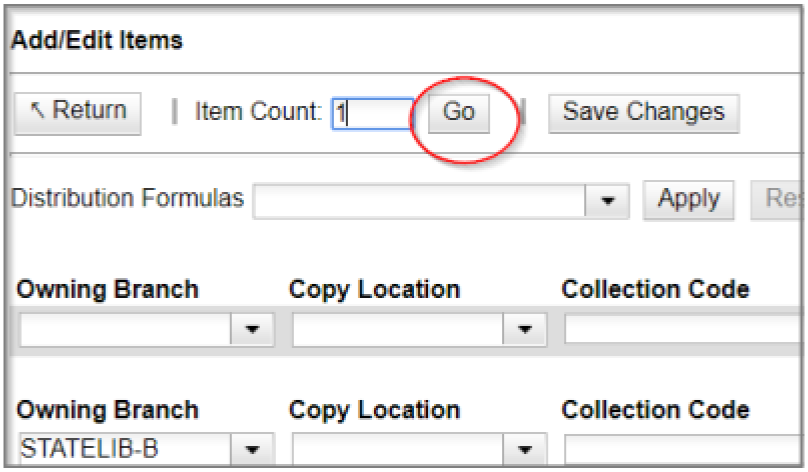
To Add Copies via the Copies link

1. Open a selection list or purchase order.

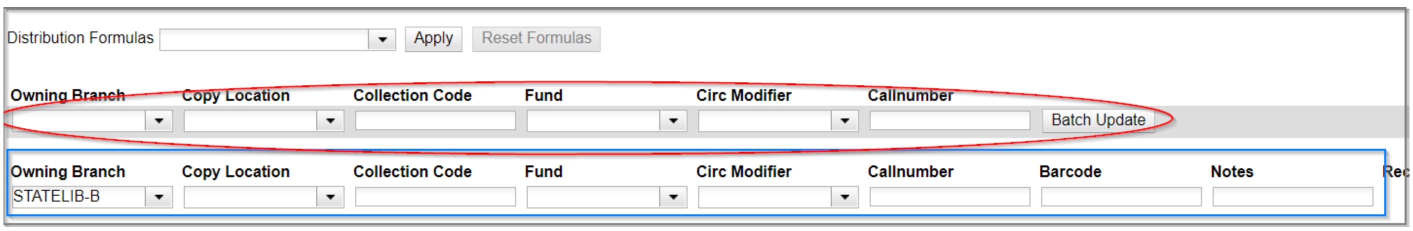
2. Click the *Copies* link on the line item you would like to add copies to. This will take you to the *Copies* screen.



3. Enter the number of copies you would like to order into *Item Count* and click *Go.*



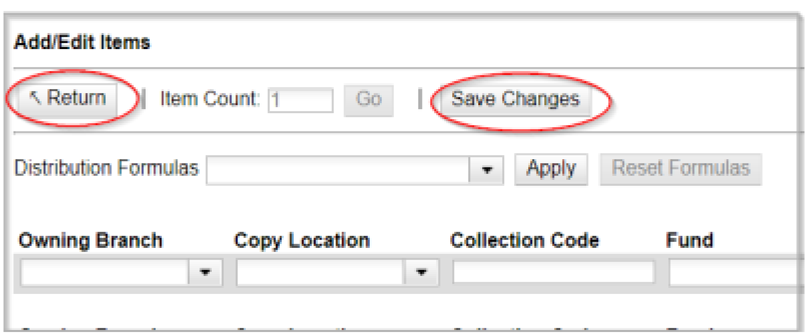
A line will be created for each copy. See these below (in the blue square). Using the dropdowns, you can add the necessary information for each copy individually. This is helpful if each copy has differences, such as in funds, that aren't in the “normal” workflow.



You'll notice that there is also a batch updater on this screen (circled in red) that works exactly the same as the **line item batch updater**. This applies any settings you add to all the copies below it.

5. **Leave the barcode field blank**. Evergreen will assign the copy a temporary barcode when the order is activated.

7. Once you have entered all the desired information, you must click *Save Changes* or your information will not be saved.



8. Click *Return* to return to your selection list or purchase order.

9. The Copies link will now reflect the number of copies that you've added to this line item.

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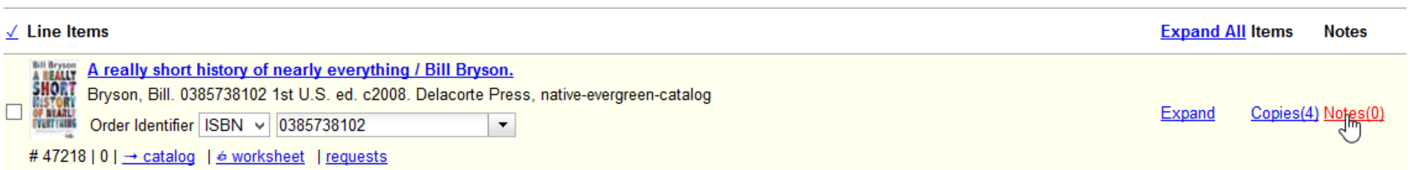
Add an alert

Alerts are pop-up messages that appear when an item is received. Alerts also display on the Line Item Worksheet for the item.

Alerts will not pop-up if they are added after the purchase order is activated.

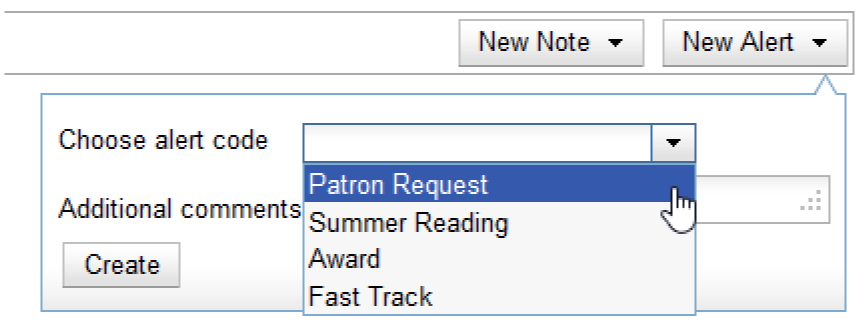
1. Open a selection list or purchase order.

2. Click the *Notes* link.



3. Click *New Alert.*

4. Choose an alert code from the drop down menu. These Line Item Alert [link] codes are created by your Acquisitions Administrator.

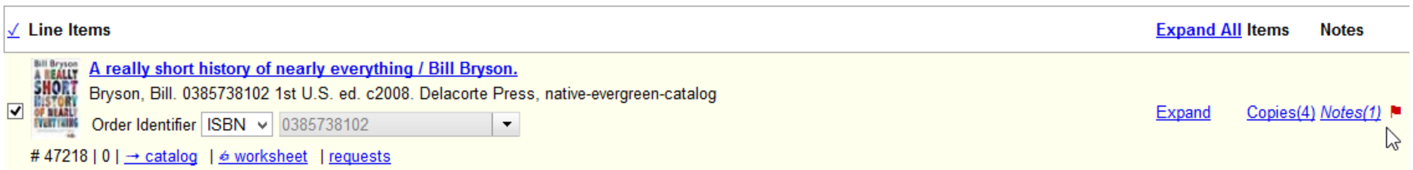


5. Add additional comments if you desire.

6. Click *Create.* The alert will display on the screen.

7. Click *Return* to return to the selection list or purchase order.

8. A red flag will now appear to the right of the *Notes* link and the *Notes (0)* link will update to display the total number of alerts and notes for the line item.



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Add a note

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Cancel/Suspend a line item

See the section on **Cancel/Suspend**.

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Use the Line Item Actions menu

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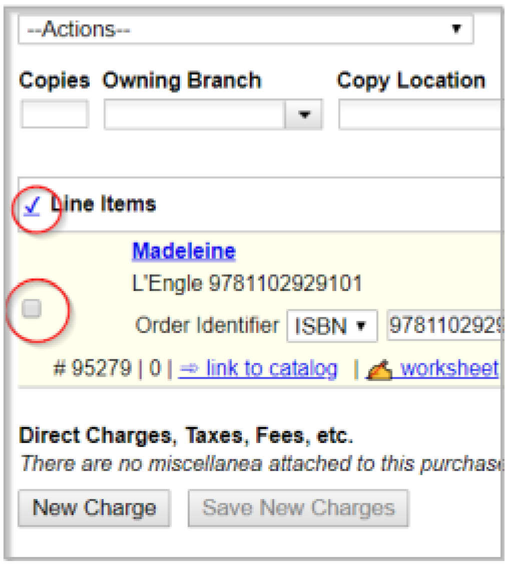
Delete a line item

Line items can only be deleted from selection lists or purchase orders with a *Pending* status.

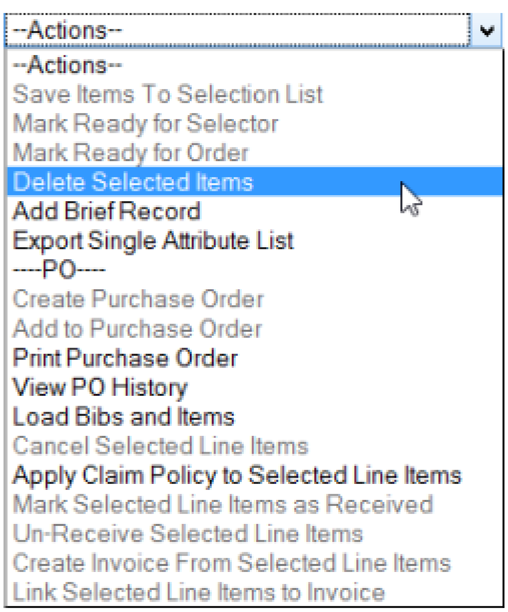
Be sure you want to delete the line item as there is no warning message and once deleted line items cannot be un-deleted.

1. Open a selection list or purchase order.

2. Check the box(es) of the line item(s) you would like to delete. You can either check the box next to specific line items, or if you are selecting all line items you can click the blue checkbox at the top of the line items area to select all.



3. Using the main *Actions* menu, select **Actions → Delete Selected Items**.



4. Your line item and the history associated with it will disappear.

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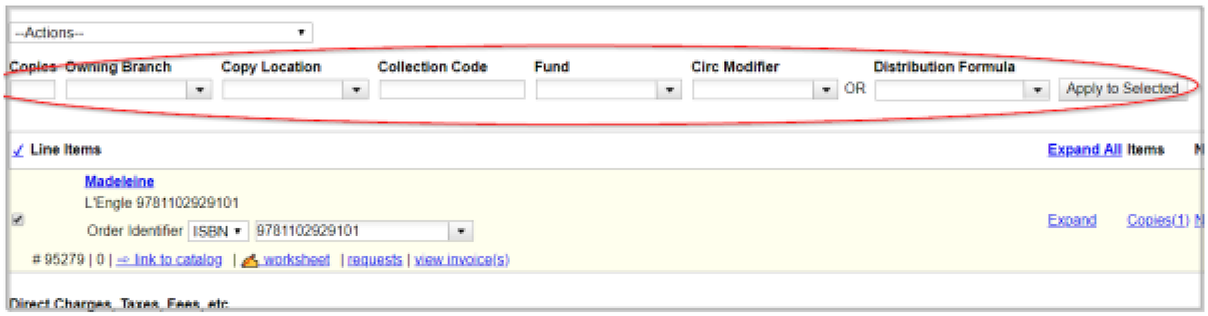
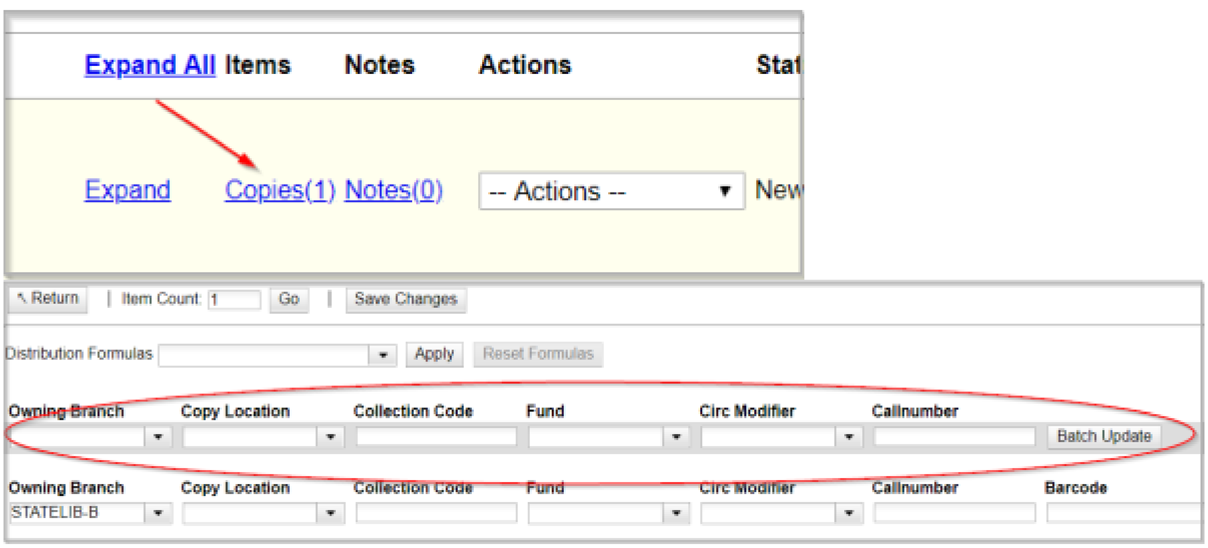
Use the batch updater

The batch updater is a method to add a specific attribute (or multiple attributes) to multiple copies at one time. There is a batch updater on the purchase order that can be used for multiple (or even a single) line items, as well as one present in the drilled-down Copies link where you can apply a specific attribute to multiple copies within one line item.

Line item batch updater –



Batch updater within Copies link –



The batch updater is a **REPLACER**, not an **ADD-TO**. It will replace data in your line item, not add to it.

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- You want to add multiple copies on one line item that all use the same branch AND fund

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Use the Copies link when:

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PINES Required Fields

When adding attributes to your line items, there are a few fields that are specified by PINES and there are required values to be used.

Shelving Location:
The shelving location should always be the ON ORDER shelving location, no matter what type of material it is.

Circulation modifier:

- If not using on-order holds, the normal circulation modifier for the type of item can be used. I.e. “book”
- If using on-order holds and 6 month age protection: Use the circulation modifier “on-order6” for all items.
- If using on-order holds and 3 month age protection: Use the circulation modifier “on-order3” for all items.

If you have not specifically set up on-order holds, do **NOT** use either the on-order6 or on-order3 circulation modifiers.

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