# Spring Cleaning for Acquisitions

# Tip Sheet

## Anatomy of a Line Item



1. Line Item ID #
2. Existing Copy Count -> # of copies already attached to the bib record belonging to the ordering agency
3. Link to Catalogue record
    a. Batch Loader identifies existing records that match the new records and allows staff to merge the new record into the existing record rather than creating a duplicate record.
    b. http://docs.sitka.bclibraries.ca/Acq/current/html/load-bib-vandelay.html
4. Link to Line Item Worksheet
5. Link to Purchase Order
6. Requests [Not in Use at this time]
7. Link to Invoice
8. Claim Policy assigned to the line item
9. Link to the Provider
10. Link to the MARC record upload Queue
    a. If you get error "Bibliographic record not found" when trying to activate your purchase order look at the upload queue
    b. http://docs.sitka.bclibraries.ca/Sitka/current/html/marc_batch_import.html#importing_merge
11. Expand or Expand All to view the Branch, Barcode, Call Number, Fund, Copy Location, Circ Modifier, Collection Code, or Note
12. Copies -> Use the Copies link to add copy information to a line item
    a. Alternatively you can use the Batch Updater or Distribution Formulas to add the Copy details
13. Status -> http://docs.sitka.bclibraries.ca/Acq/current/html/line-item-status.html

Line items represent bibliographic records on a selection list or purchase order. One line item corresponds to one bibliographic record. Line items contain attributes, which are characteristics of the bibliographic record, such as ISBN or Title. Line items also contain copy information, price information, notes, and alerts.

### Reports
Admin -> Local Admin -> Reports -> Shared Folders -> Sitka Templates -> Acquisitions -> Line Items ->
- Line items received but not invoiced.
- Line items invoice but not received
- Line Items with the Status of On-order

Admin -> Local Admin -> Reports -> Shared Folders -> Sitka Templates -> Acquisitions -> Funds ->
- Fund Report by Year

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**Recommended Follow-up**

- Send Sitka Support details of your top 2 acquisitions bugs
    1. Include suggestions of how you would expect it to work or suggestions for improvements.
- Let us know if your primary vendor is not ULS or Whitehots.
- If your primary vendor is ULS or Whitehots and you are not uploading records with holdings attached
    1. Talk to ULS find out if there is a cost involved
    2. Let us know if you have additional questions.
    3. http://docs.sitka.bclibraries.ca/Acq/current/html/holding-subfield.html
- If your primary vendor is ULS or Whitehots and you are not using EDI ordering or invoicing
    1. Let us know if you are interested in setting this up
- Send us a list of "on-order" PO's which can be set to "received"
- Send us a list of "pending" PO's with no line items - these PO's will be deleted
- Prorate Bug fix coming soon!