

Relinking a Line Item on a Purchase Order in FOLIO to a different Bib Record (LTS Procedure # 80)

Scope: This document outlines directions for "relinking" a POL (purchase order line) from one specified bibliographic record to a different bibliographic record.

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Unit: Monographs Receiving

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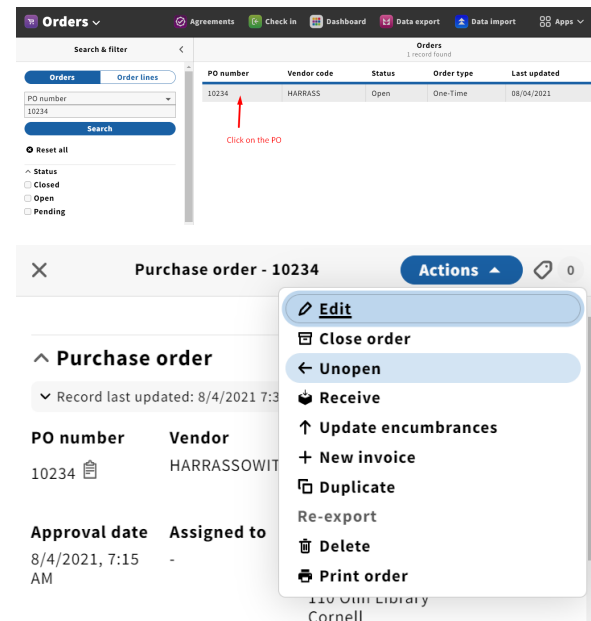
A. Under what conditions is it permissible to relink a purchase order line?

- The most common reason to relink a POL is when a multi-vol is ordered on separate records.
- Another likely reason to relink a POL to a different record is when handling duplicate electronic resource "e-journal records" where the one duplicate that we want to delete needs to have it's POL re-linked to the correct e-journal record so that the obsolete e-journal records (Instance and Holdings pair) can then be deleted.

Re-linking should be brought to the attention of appropriate Acquisitions staff with the permissions required to do the relinking.

To begin relinking a POL you will open the Orders app and search the purchase order number that needs relinking. Click on the specific PO number that needs to be relinked.

Click on "Actions" in the upper right hand corner and then click "Unopen". You will then see a toast that will say the unopening was successful.



Scroll down to PO lines and click on the POL that you want to relink.

✕ Purchase order - 10234 Actions ▾ 0

price \$0.00
\$143.20

^ PO lines Add PO line

POL number	Title or package name
10234-1	Heinrich und Götz George : zwei Leben / Thoma
10234-2	Jean-Luc Godard : der permanente Revolutionä
10234-3	Andreas Dresen : Glücks Spiel : Porträt eines Re
10234-4	Leni Riefenstahl : Karriere einer Täterin / Nina C
10234-5	Inszenierte Realität : DEFA-Spielfilme als Quelle Klaus-Dieter Felsmann.

End of list

After clicking on the POL you want to relink you will be brought to the PO Line Details where you will click "Actions" ; "Edit"

← PO Line details - 10234-2 Actions ▾ 0
Jean-Luc Godard : der permanente Revolution...

^ Item details
Record last updated: 8/4/2021 7:

Title
Jean-Luc Godard : der permanente
Rebhandl.

[Edit](#)

[Change instance connection](#)

[Receive](#)

[Re-export](#)

[Delete](#)

[Print order line](#)

[Print order](#)

Here you will click on "Title look-up"

Orders ▾ Agreements Check in Dashboard Data export Data import Apps ▾ 0

✕ Edit - 10234-2 Collapse all

^ Item details
Record last updated: 5/2/2022 1:37 PM

Package
Title* Connected
Jean-Luc Godard : der permanente Revolutionär : Biografie / Bert Rebhandl.

[Title look-up](#)

Change the criteria as you see fit and search the record you want relinked to the POL. Click on the title to be relinked.

✕ Select instance

Search & filter

Instance Holdings Item

Keyword (title, contributor, id):
100 birds of Belize

[Search](#) [Reset all](#)

Effective location (item):

Language

Search results
1 record found

Title	Contributors	Publishers
100 birds of Belize / Carolyn M. Miller.	Müller, Carolyn M.; Belize Audubon Society	Belize Audubon Society (1995)

End of list

After clicking on the title you want relinked it will populate to the title field on the POL and you will see the new title is now "Connected"

Connected

Click "Save & open order"

You will then get a toast saying the PO was successfully opened.

You can now see that POL 10234-2 is now linked to the title: 100 birds of Belize!

Orders ▾ Agreements Check in Dashboard Data export Data import Apps ▾ 0 One Service Point

✕ Edit - 10234-2

^ Item details
Record last updated: 5/2/2022 1:37 PM

Package
Title* Connected
100 birds of Belize / Carolyn M. Miller.

[Title look-up](#)

Receiving note: Subscription from: Subscription to: Subscription interval:

Publication date: 1995 Publisher: Belize Audubon Society Edition: 2nd ed. Linked package: Lookup package POL

Contributor*: Müller, Carolyn M. Contributor type*:

[Cancel](#) [Save & close](#) [Save & open order](#)

^ PO lines

Add PO line

POL number	Title or package name
10234-1	Heinrich und Götz George : zwei Leben / Thoma
10234-2	100 birds of Belize / Carolyn M. Miller.
10234-3	Andreas Dresen : Glücks Spiel : Porträt eines Re
10234-4	Leni Riefenstahl : Karriere einer Täterin / Nina G
10234-5	Inszenierte Realität : DEFA-Spielfilme als Quelle Klaus-Dieter Felsmann.

End of list