
Situation:

The location on an **approved** purchase order does not match the Catalogue holding record location where the item(s) reside. It is not possible to delete the incorrect holding record from the Catalogue as it remains linked to an active purchase order.

Although it is possible to edit the location and fund in the purchase order, it is *not* possible to **relink** to a different location (holding record), so although the PO is corrected, there is no impact on the Catalogue. A further drawback is that editing the PO location will result in the loss of check-in receipt history.

It is not essential that the locations match between the Acquisitions and Catalogue records as in many cases it is more work to fix that it is worth. However, it is important to add notes in the respective records to ensure correct processing of items received on the order.

Solutions:**Purchase Order editing:**

If the receipt history (check-in) must be retained, do not change the intended location, but simply add a line item note stating the correct holding record location:

e.g. MFHD = Law stacks (10mr2005kat)

If a fund number change is required, add an additional note:

e.g. 2005+ Pay on fund 1513000-19 (10mr2005kat)

If there is no issue receipt history (as with added volumes) or if this history can be easily reinstated or is not required, the location in an approved purchase order can be edited as follows:

- Open the Order to the **Header** page
- Highlight the **Line Item**
- From **Line Item** menu bar, select **Edit Approved**
- Select the correct **Location** from the intended location drop-down menu
- Click **OK** when the warning about losing receipt history displays
- Enter **Ledger** and **Fund** data
 - ▶ after entering Fund, key Enter, fund will go blank, ignore & continue
- **Save.**

Note: this does not change anything in the Catalogue holding record.

Catalogue Holding record editing

The simplest solution is to suppress the offending location record and put a 583 note into it to advise staff not to add items.

e.g. +583 \$3 New items \$a do not add to this holding \$x record suppressed 10mr2005kat

The more complex solution is to transfer (or relink) the appropriate items to the holding record that is linked to the purchase order.

- Use the item relink feature available in either the Catalogue or Circulation modules.
- Resequence and edit the permanent location of item records if required.
- Change the holding record location (+852 \$b) to whatever is correct.
- Edit the 866 summary statement if necessary.
- Add 583 notes as needed (e.g. for sliding locations)
- Delete the empty holding record from which the items have been transferred. This will be possible, as it is not linked to a purchase order.