

Purchase Requests

In this tutorial you will learn how to fill out a purchase request in Rialto.

Previously purchase requests had to be approved or rejected in Alma by going to Acquisitions > Manage Purchase Requests. There, the order could be approved and would then need to be processed through an outside vendor to obtain the item. The PO generated in Alma and the invoice from the vendor would need to be merged.

For a step by step guide about purchase requests in Alma please watch the Purchasing Workflows video in the Alma Essentials training on the Ex Libris Knowledge Center.

In Rialto, this has all been simplified. You start in the same place, Acquisitions > Manage Purchase Requests, but instead we're going to click "Search in Market". Alma then takes all the information from the purchase request and then searches the Market for matching offerings. If you want to change the query you can search by Keyword, Title, or ISBN. I'm just going to leave this as is for now.

When you click on a title it opens and you can review the options like a normal search result in Rialto. In addition to the standard item information you can also see the purchase request details while you are determining which item to buy.

If the item is coming from a course reserve, information about the course will be included, and if your institution has Leganto it will add structured data about the course, the code, and the number of students in the class, etc.

Now I'm going to choose an item to fulfill this purchase request, and click "Link and Add to Cart". This automatically approves the Purchase Request and prepares the item for checkout. If you go back to the original Purchase Request you can see it says "Linked to market offering". Now you can either click the linked text or click your cart to see the item that was selected.

In the cart the item will have an indicator stating that it is linked to a Purchase request, and when you click on it it will open the information panel. In here you can choose the item's physical location, what fund will be used to purchase it, and you can add any additional notes to the vendor.

The interested user, which is the purchase order requestor, will be notified when the item becomes active in your system. Once everything looks good, you can click Checkout and confirm your purchase.