New and emerging acquisitions workflows
Purchase Requests

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igelu International Group of Ex Libris Users

ExLibris a ProQuest Company

Agenda

1. **Introduction**
2. **Purchase request from Primo**
3. **Staff creation of purchase requests**
4. **Staff management of purchase requests**
5. **Future Developments**

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Introduction - The question

- How to allow patrons to suggest titles, P or E, for purchasing ?

https://blog.udemy.com/wp-content/uploads/2014/04/shutterstock_141849031-300x300.jpg

http://conferenceservices.unl.edu/img/RFS/Request%20Icon.jpg

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Purchase Request from Primo - Two Ways

- A patron can make a Purchase request in the Primo discovery interface from the GetIt tab of

1. Primo Discovery search results
   - Creates order for additional inventory
2. Primo Discovery Citation Linker for an item not yet found in the repository
   - Creates a new bibliographic record

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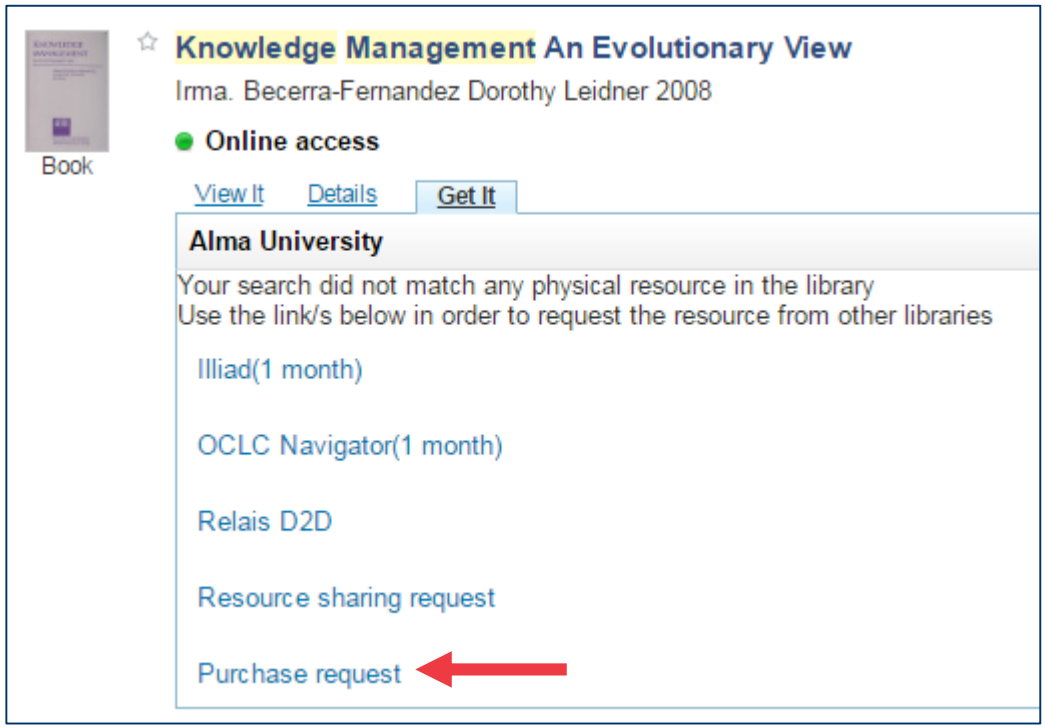
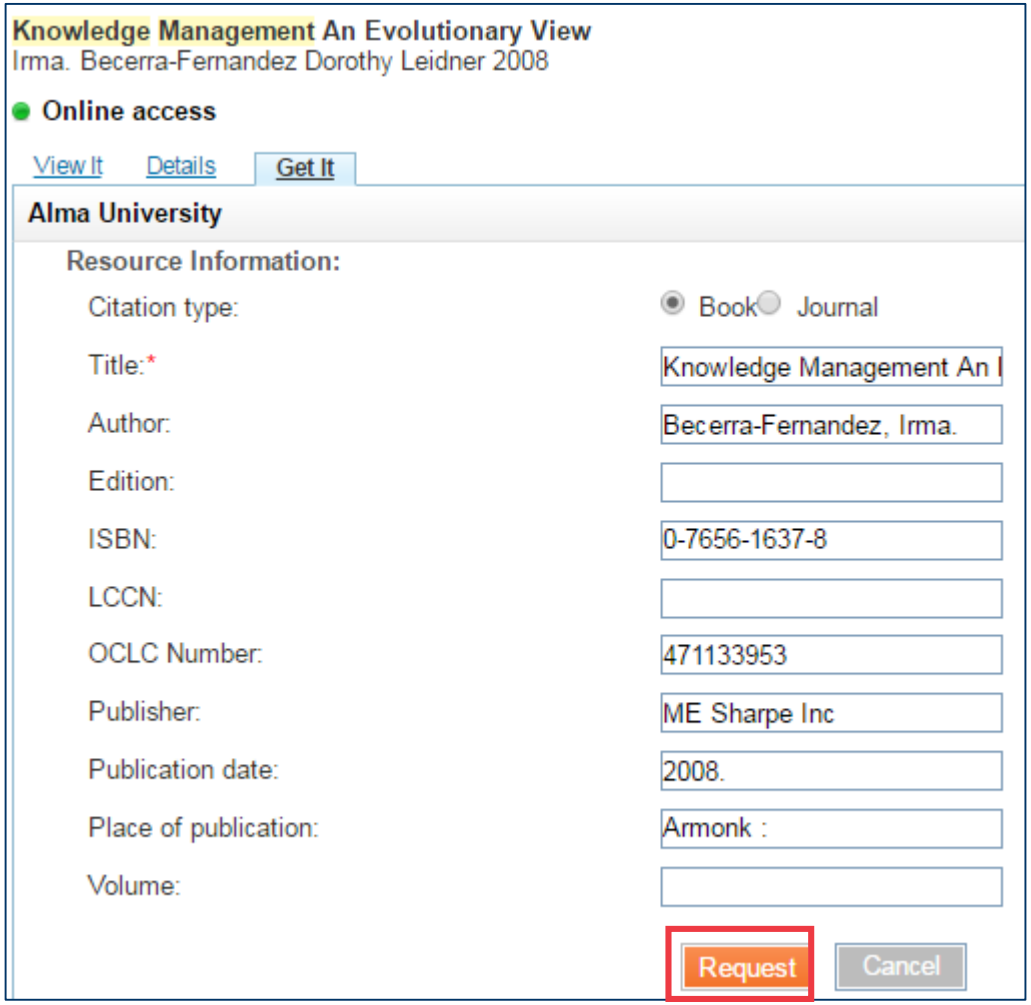
Purchase request from Primo discovery search results

- Here patron performs a search in the Primo discovery interface and from the GetIt tab has a link to “Purchase request”. This is in addition to the existing inventory.



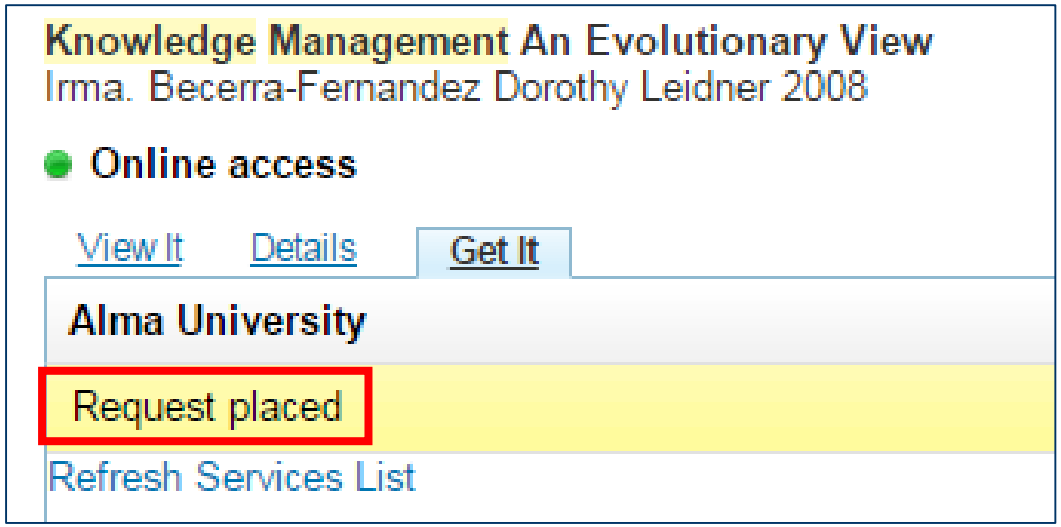
Purchase request from Primo discovery search results

- The form is filled in with default values from the existing bibliographic record



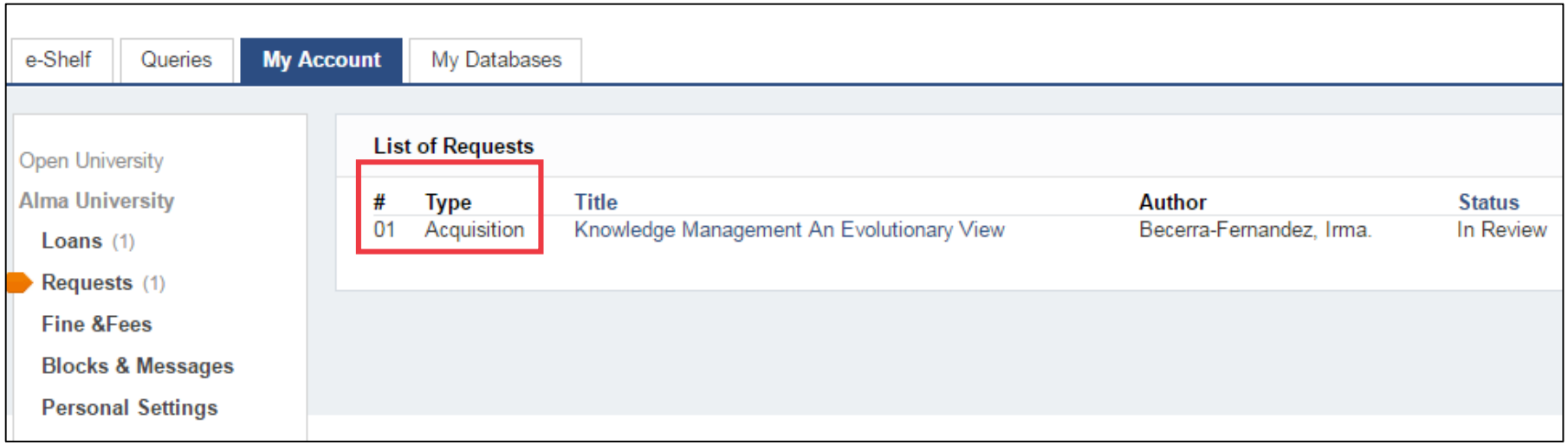
Purchase request from Primo discovery search results

- Request is placed



Purchase request from Primo discovery search results

- In the Primo “My Account” the patron can see this request



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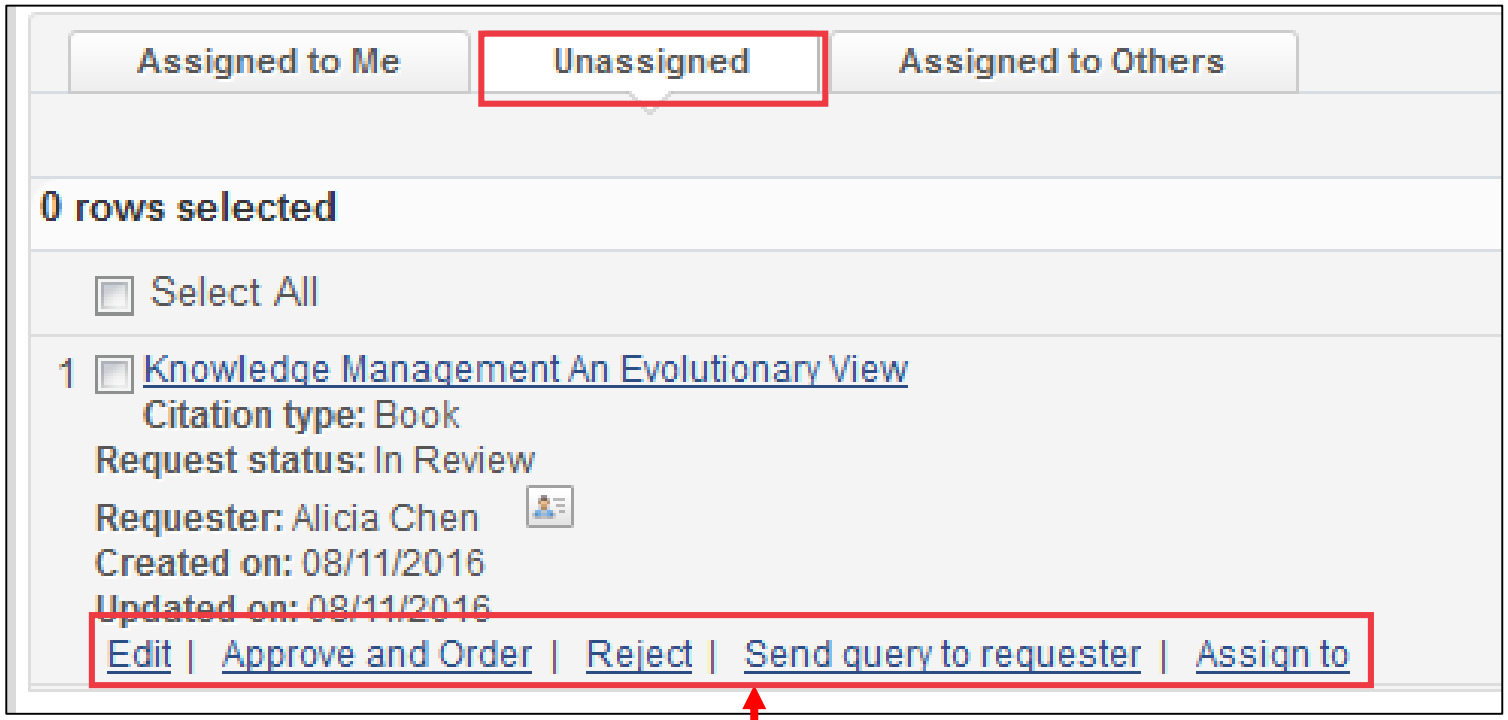
Purchase request from Primo discovery search results

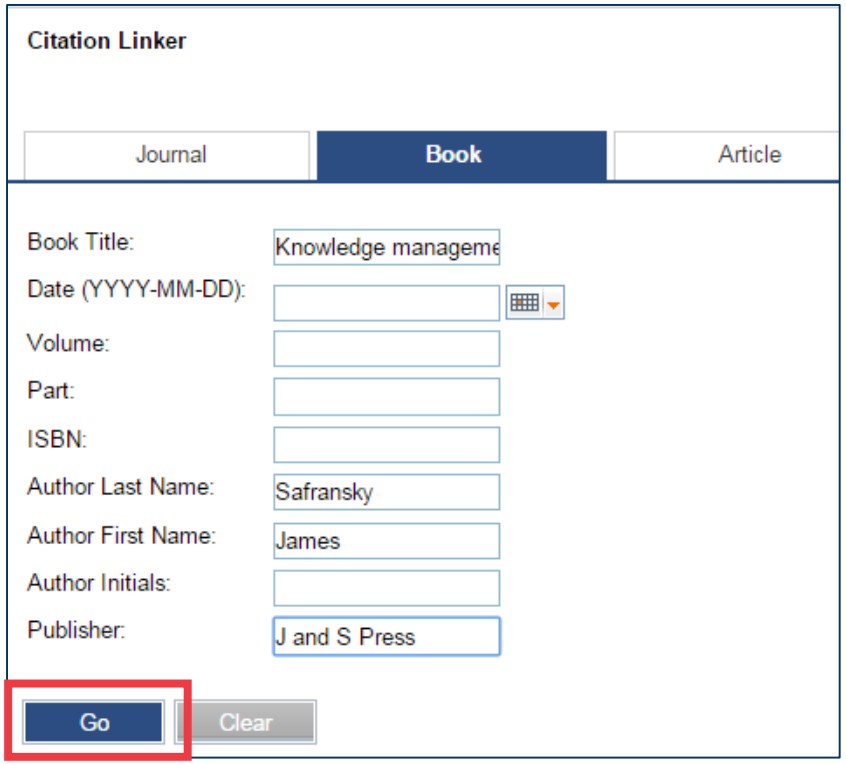
- The order is created and appears in the “unassigned” tab of the purchase requests, available at Acquisitions > Purchase Requests > Manage Purchase Requests



The order can be handled from here in various ways

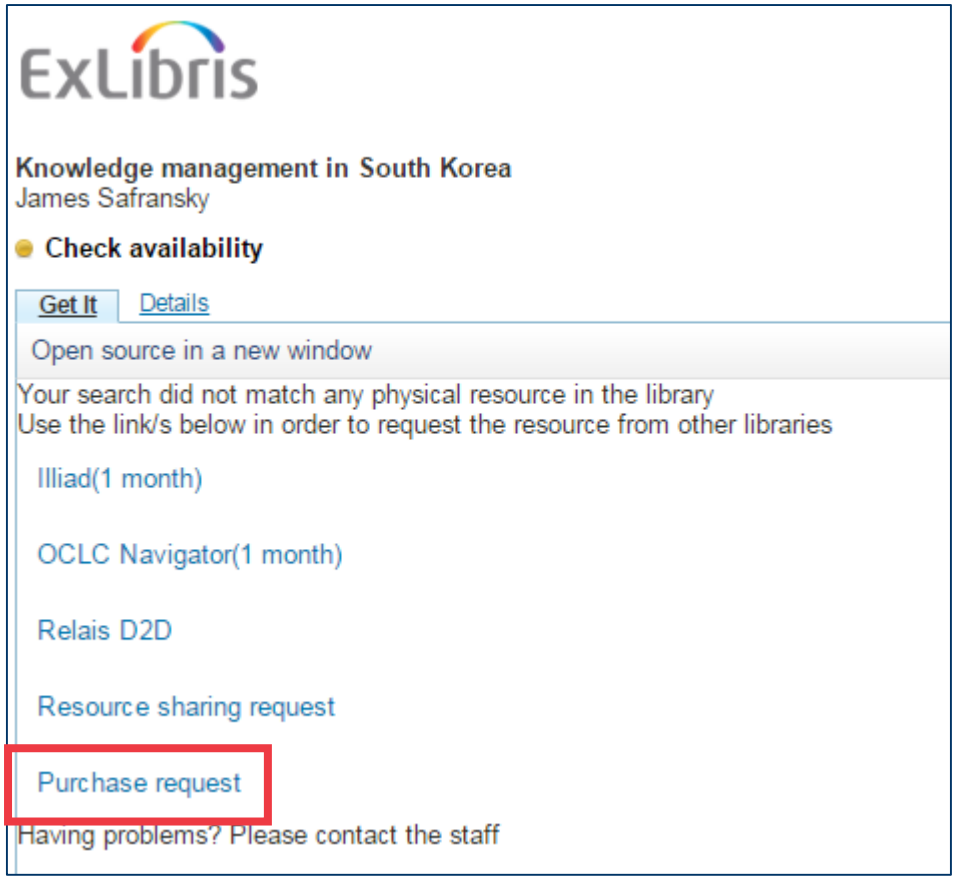
Purchase request from Primo discovery Citation Linker

- Now the patron will create a Purchase request via the ‘Citation Linker’.



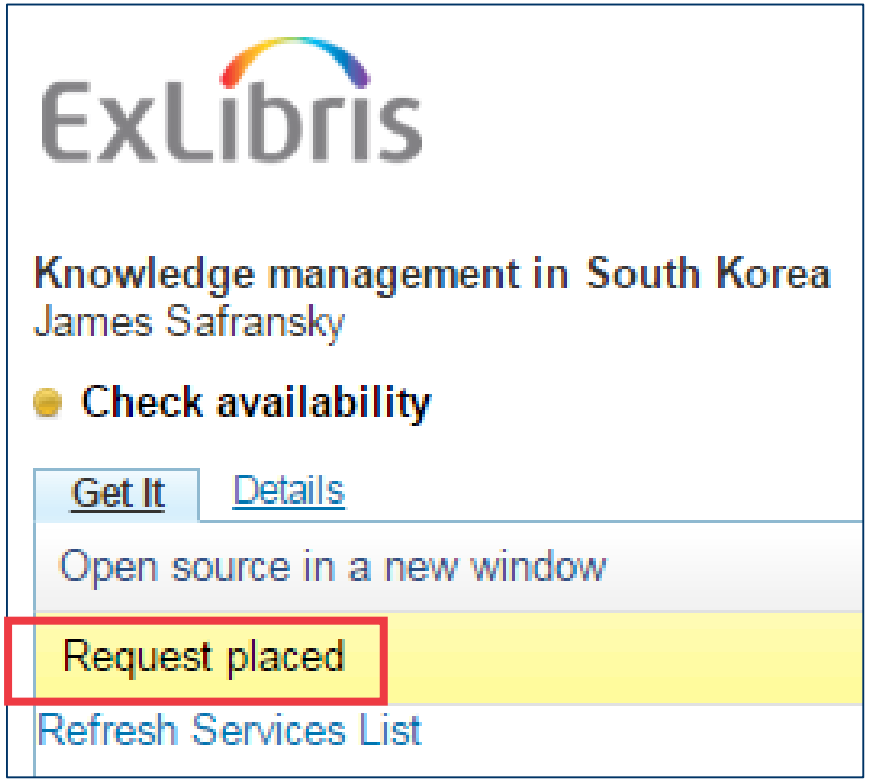
Purchase request from Primo discovery Citation Linker

- From the citation linker results the user clicks the link for purchase request



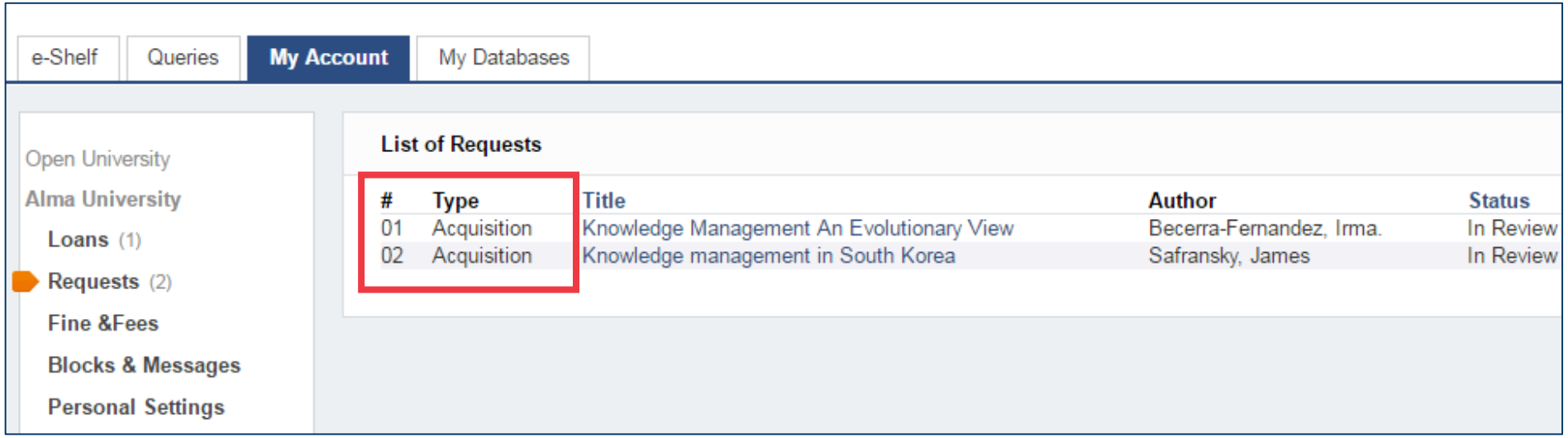
Purchase request from Primo discovery Citation Linker

- Again the request is created and appears in the “My Account” of the user in Primo.



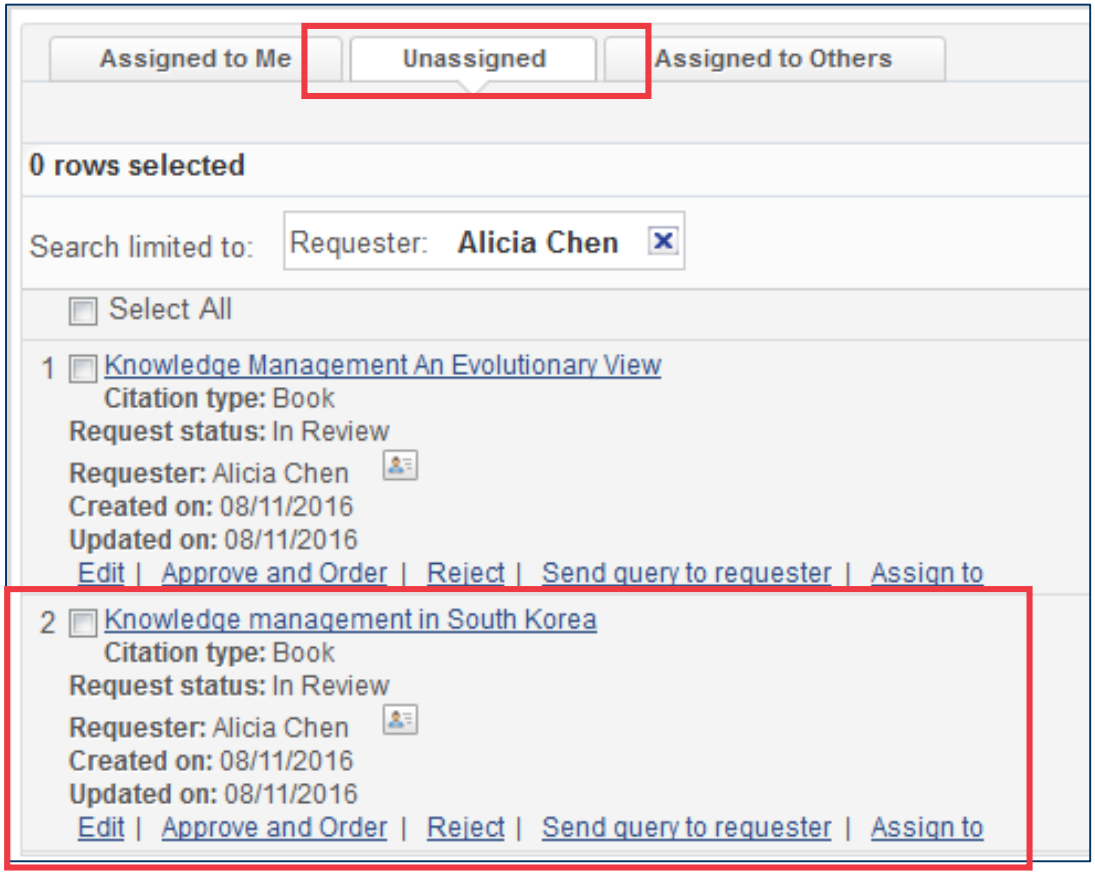
Purchase request from Primo discovery Citation Linker

- Again the request is created and appears in the “My Account” of the user in Primo.



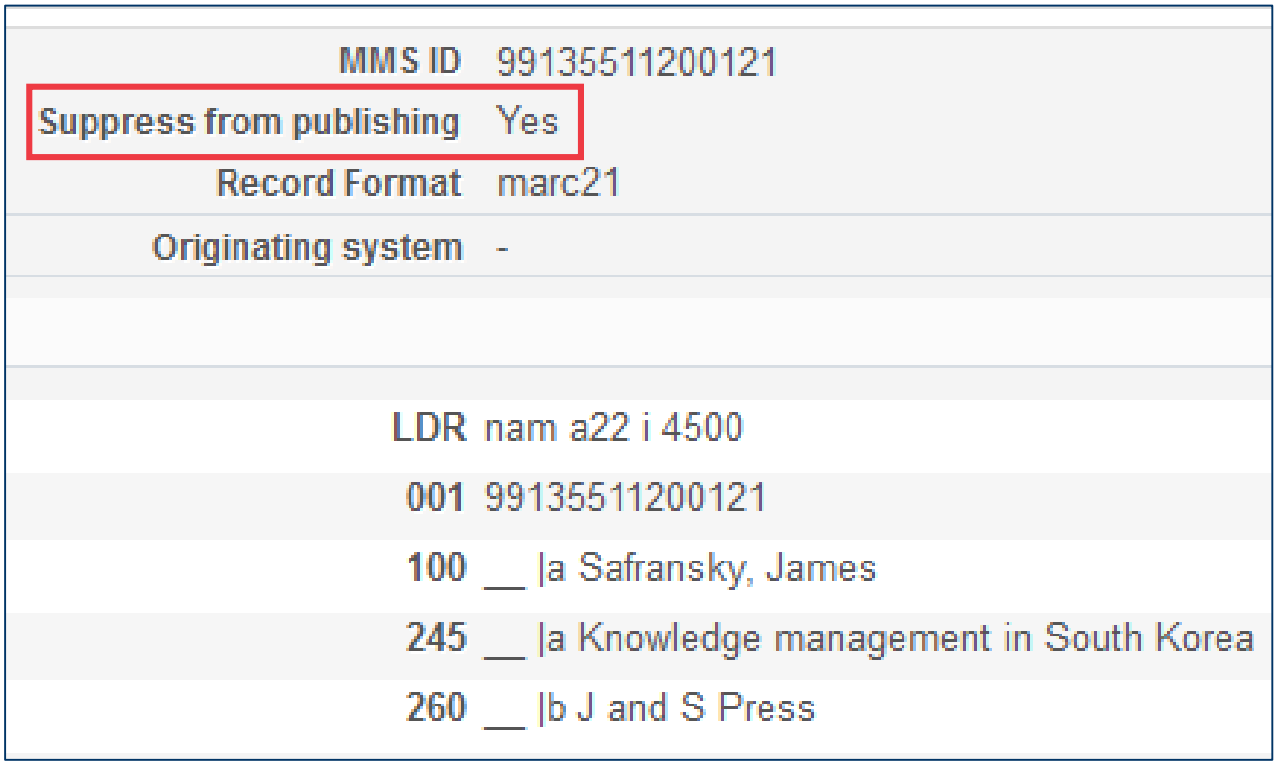
Purchase request from Primo discovery Citation Linker

- And again, the order is created and appears in the “unassigned” tab of the purchase requests, available at Acquisitions > Purchase Requests > Manage Purchase Requests



Purchase request from Primo discovery Citation Linker

- When the purchase request was made from the citation linker for a non-existing record a bibliographic record is created and is suppressed from publishing



MMS ID	99135511200121
Suppress from publishing	Yes
Record Format	marc21
Originating system	-
LDR	nam a22 i 4500
001	99135511200121
100	__ |a Safransky, James
245	__ |a Knowledge management in South Korea
260	__ |b J and S Press

Agenda

1. Introduction
2. Purchase request from Primo
3. **Staff creation of purchase requests**
4. Staff management of purchase requests
5. Future Developments

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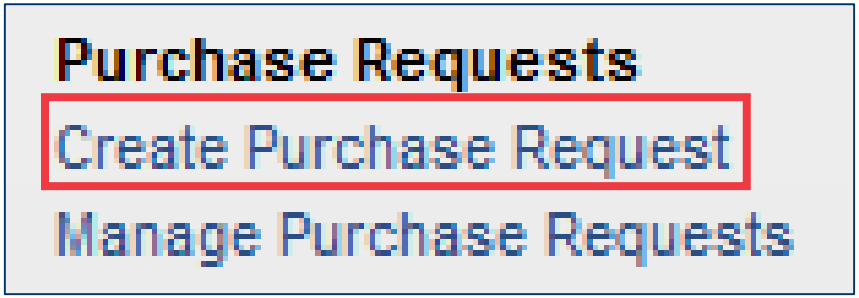
Staff creation of purchase requests

- Staff can also create purchase requests.
- This is done via the menu ‘Acquisitions > Purchase Requests > Create Purchase Request’



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Staff creation of purchase requests

- After clicking ‘Create Purchase Request’ the staff user receives

1. A similar form as appeared in the Discovery Interface for the logged in patron
2. An additional section with acquisition related information such as estimated price, vendor and fund
3. A “Search in repository” button
4. A section to add patron details and notes

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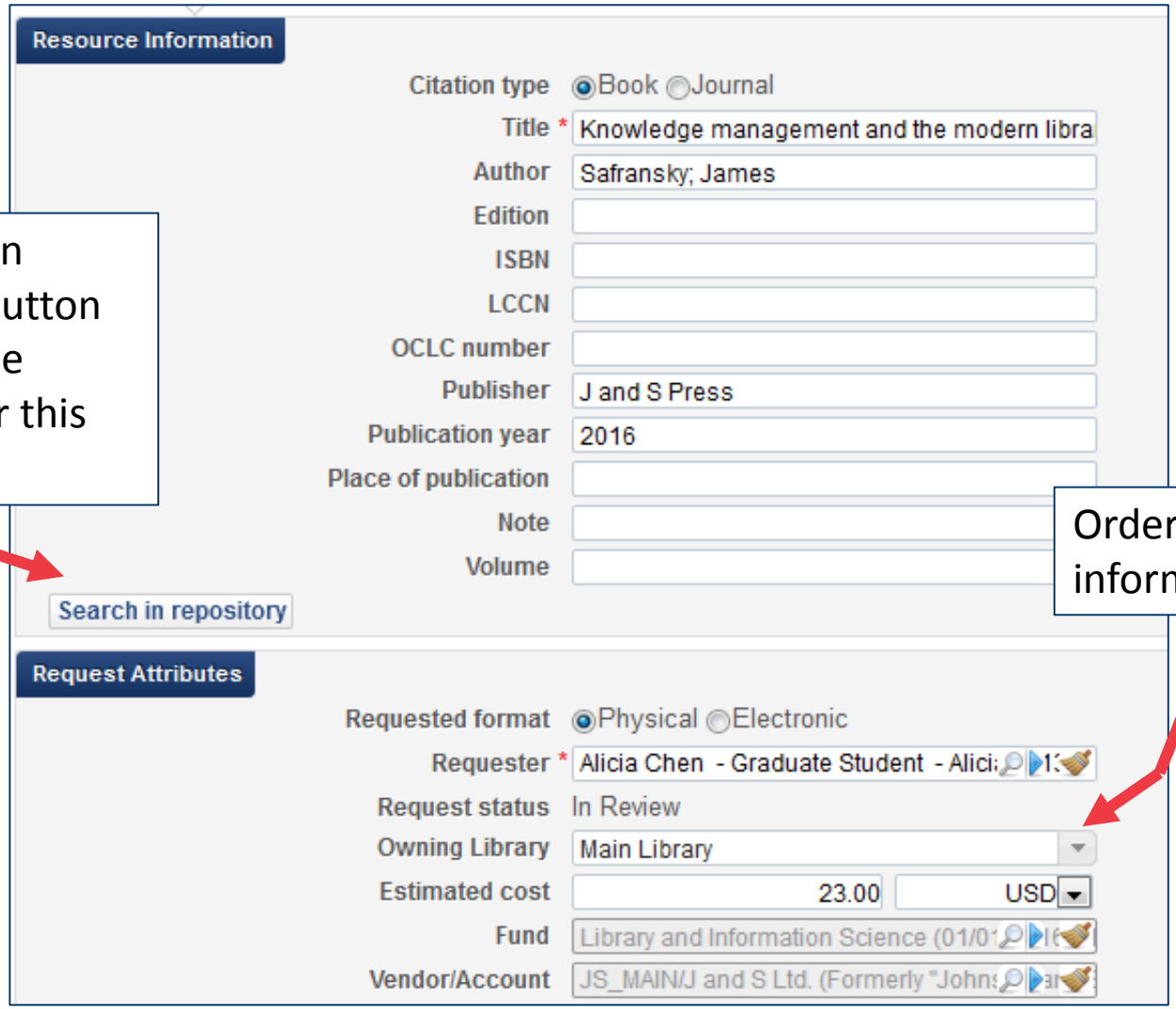
Staff creation of purchase requests

The “Search in repository” button will search the repository for this record

Order-related information



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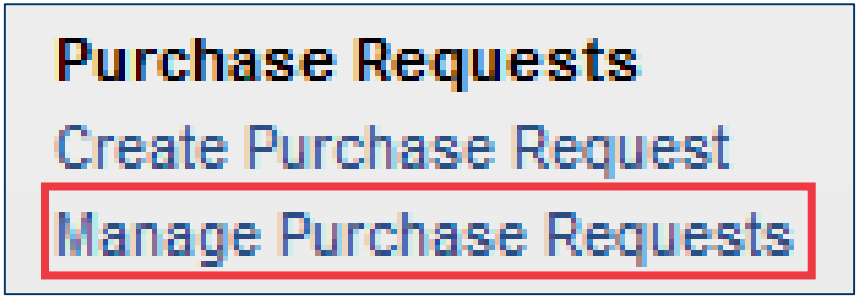
Staff management of purchase requests

- Staff can also manage the purchase requests.
- This is done via the menu ‘Acquisitions > Purchase Requests > Manage Purchase Requests’



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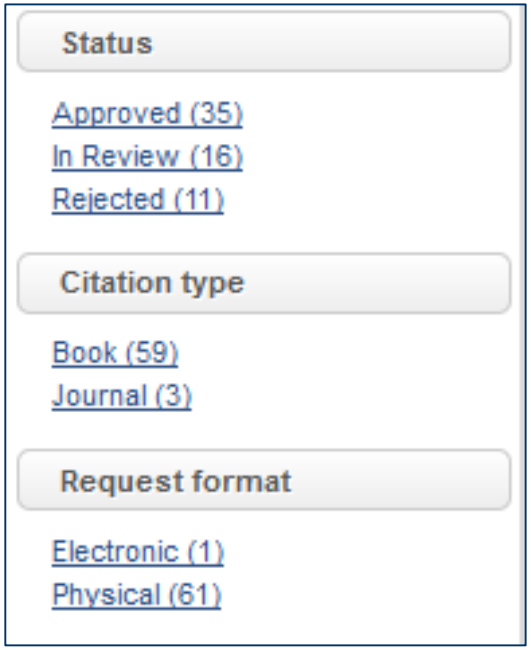
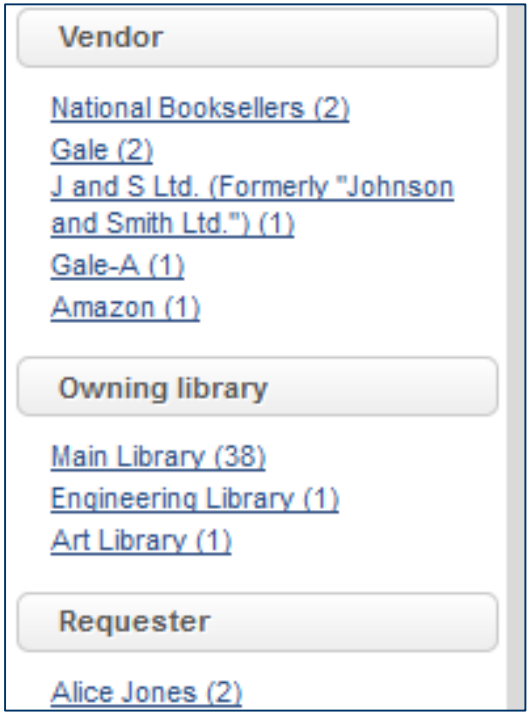
Staff management of purchase requests

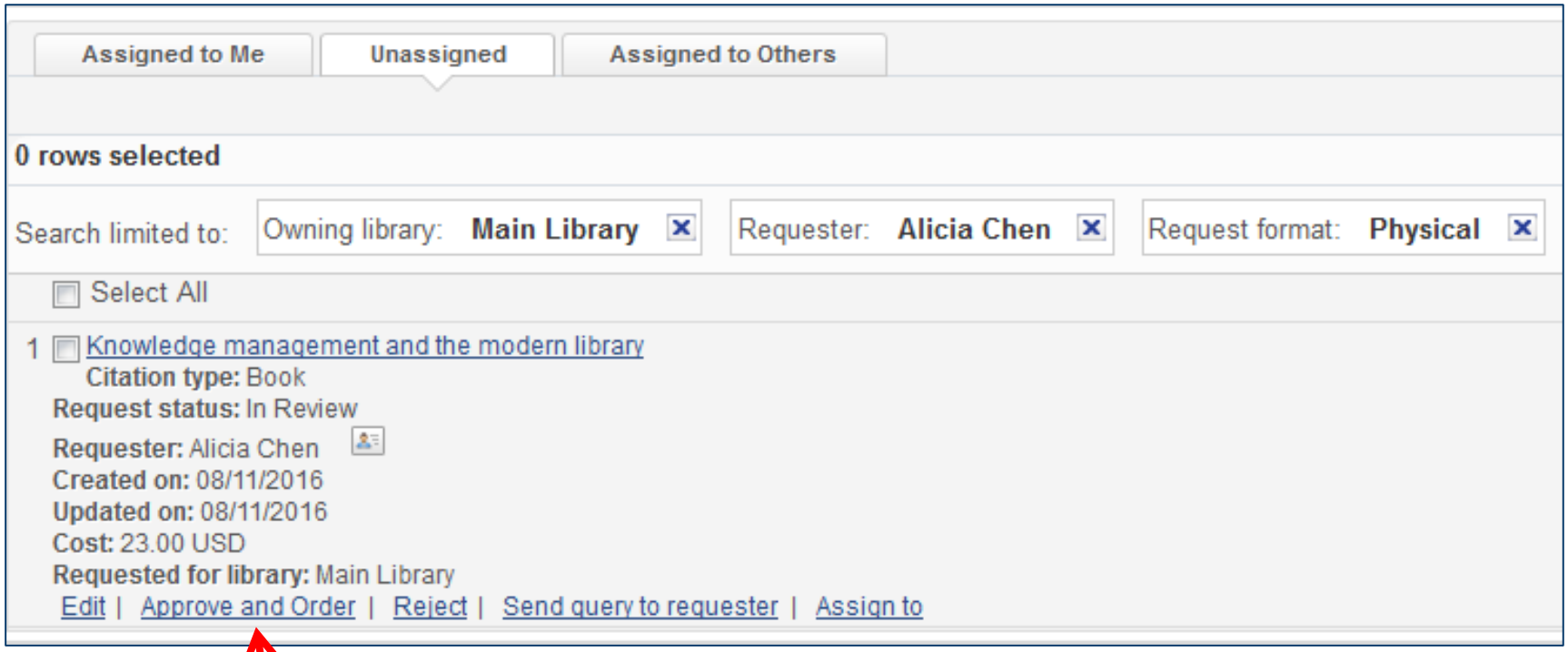
- The requests can be faceted in a variety of ways





Staff management of purchase requests

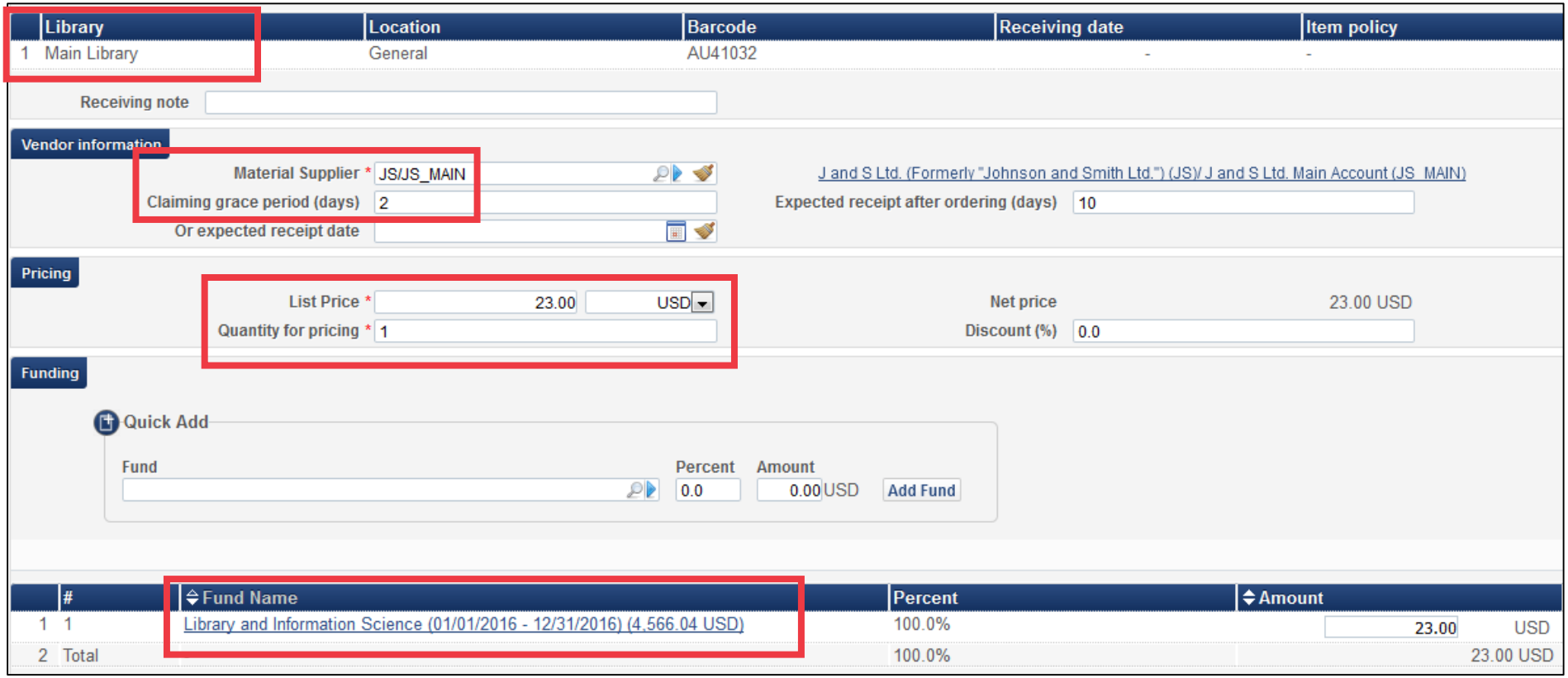
- New purchase requests appear in the “unassigned” tab of “manage purchase requests”.



We will click “Approve and Order”

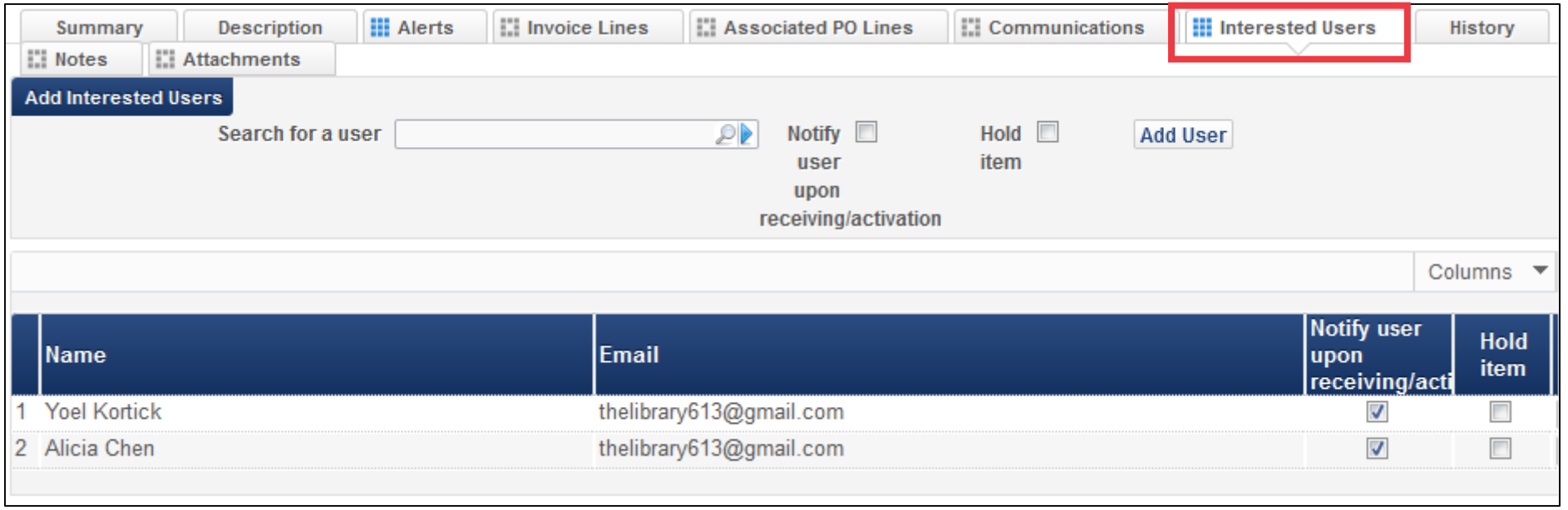
Staff management of purchase requests

- In the case of requests created by staff in the Alma user interface: The library, vendor, price and fund all come from the purchase request



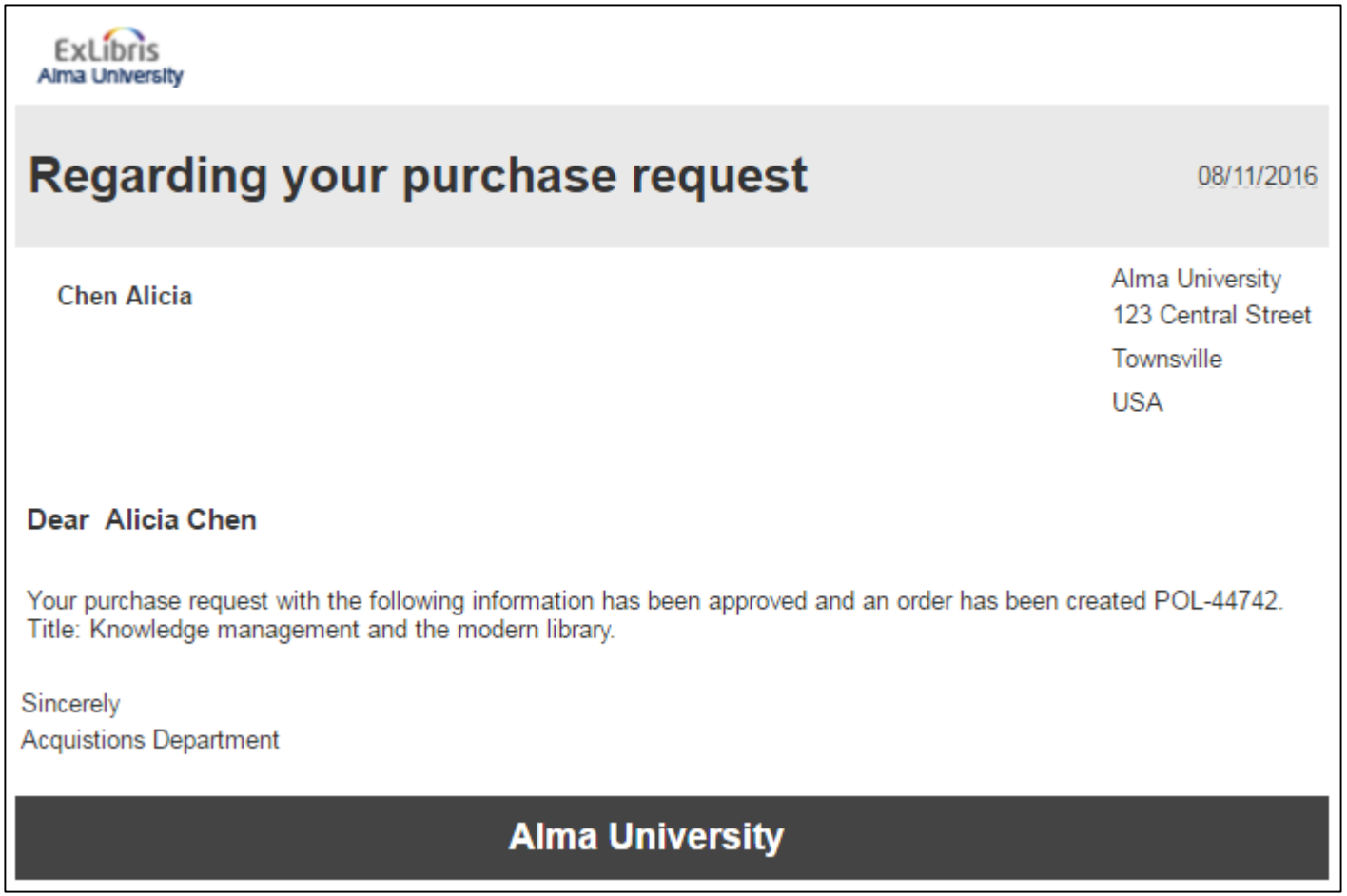
Staff management of purchase requests

- Both the patron for whom the request was made as well as the staff user who made the request are registered as ‘Interested users” in the POL.



Staff management of purchase requests

- The patron receives a letter stating that his request has been ordered



ExLibris
Alma University

Regarding your purchase request 08/11/2016

Chen Alicia

Alma University
123 Central Street
Townsville
USA

Dear Alicia Chen

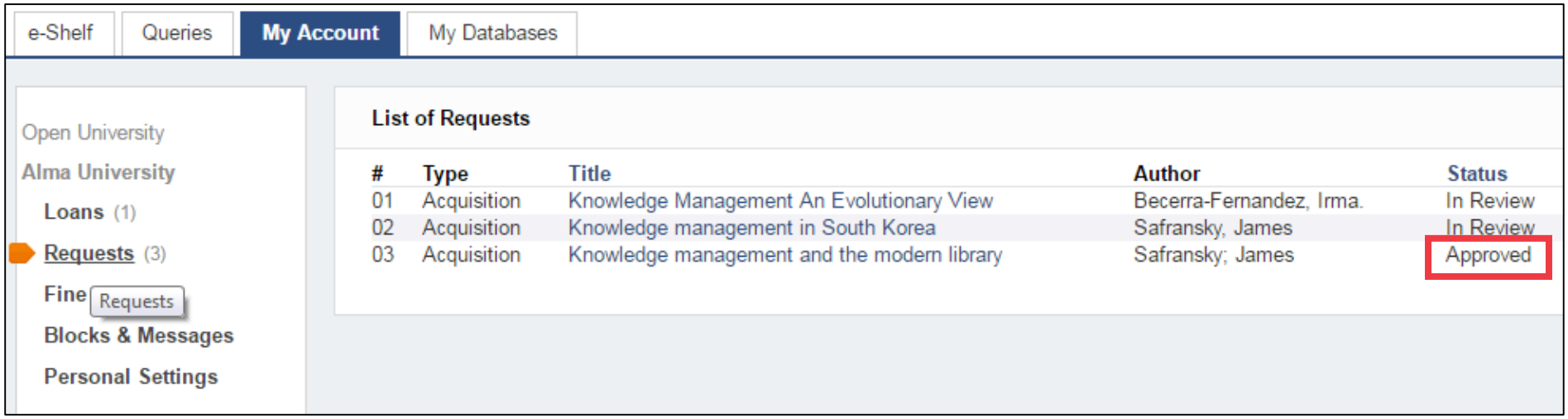
Your purchase request with the following information has been approved and an order has been created POL-44742.
Title: Knowledge management and the modern library.

Sincerely
Acquistions Department

Alma University

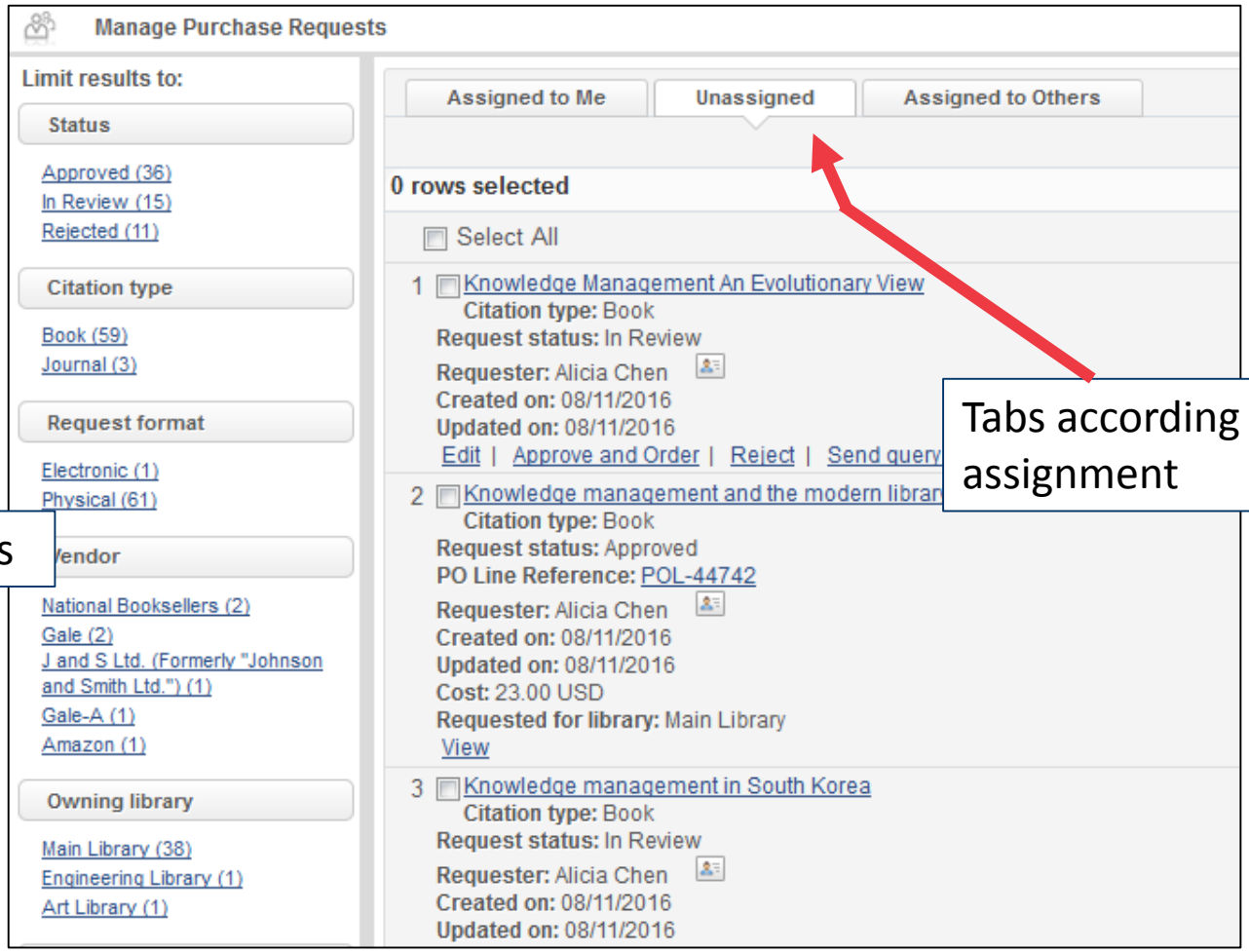
Staff management of purchase requests

- The patron also sees the status change in the “My Account” of Primo



Staff management of purchase requests

- After clicking “Manage Purchase Requests” the full list of existing request appears

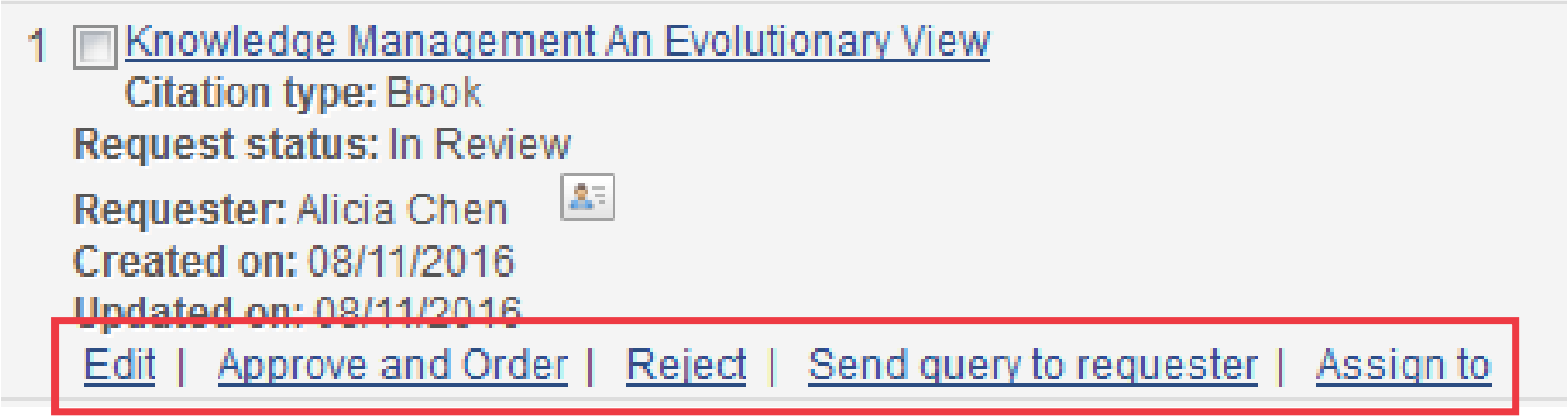


Multiple facets

Tabs according to assignment

Staff management of purchase requests

- Each request may be
  - Edited
  - Approved
  - Rejected
  - Assigned to another staff user
  - Queried to the requester



Staff management of purchase requests

- Clicking “Approve” will
  - Create an order
  - Send an email to the requester notifying him that the request has been created as an acquisitions order.
- Clicking “Reject” will
  - Change the status of the order to “Rejected”
  - Send an email to the requester notifying him that the request has been rejected.
- Click “Send Query to Requester” will
  - Open an email form addressed to the requester and include the bibliographic details of the request
  - Allow the staff user to enter a query and send it to the patron

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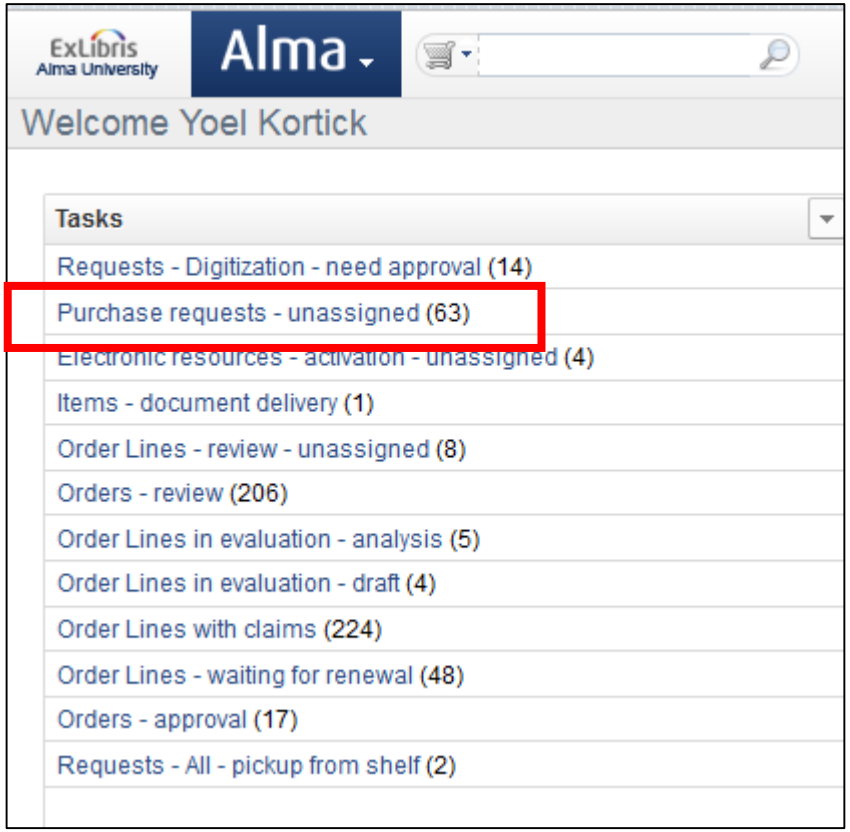
Staff management of purchase requests

- Staff can also manage purchase requests from the task list



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Future developments – Customizing the form

- Customizing the Patron Purchase Request form in Primo
- This will be done via a mapping table
- When table is empty the Alma OTB form will be used.
- Will be possible to:

1. Choose which fields appear and in what order (sequence)
   - Show on form (Y/N)
2. Determine which fields are mandatory
   - Mandatory (Y/N)
3. Hide specific radio button options
   - Book or Journal

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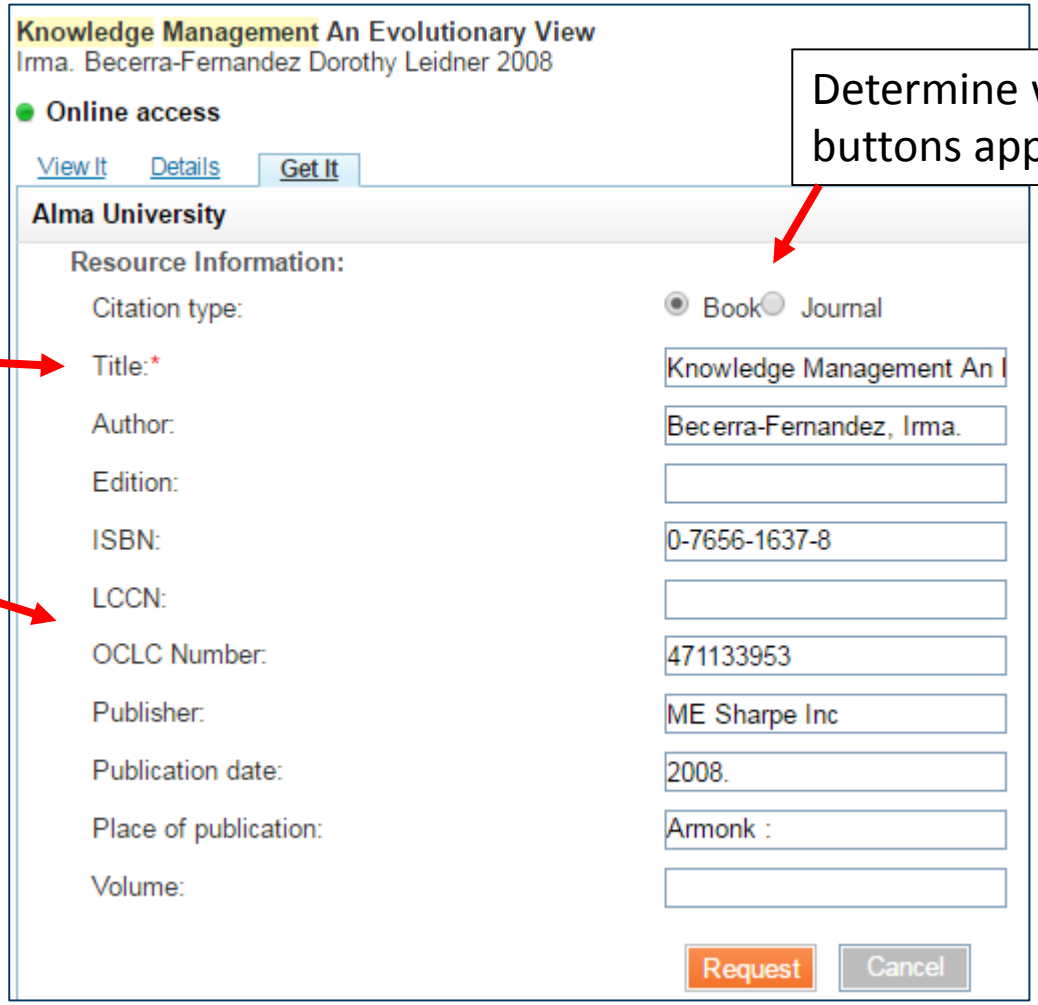
Future developments – Customizing the form

Determine which fields are mandatory

Determine the order of fields

Determine which radio buttons appear



Future developments – limits

- The Patron Limits table will support a limit on the number of allowed purchase requests.
- The system will count all open or approved purchase requests against this limit.
- It will also be possible to set a cost limit. If set, open or approved purchase requests' estimated cost will be calculated against this limit.

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Future developments – limits

- A parameter will be used to define the date after which the count starts.
  - For example, setting this parameter to 1/1 will mean only requests after the last 1/1 (for example, after 1/1/2017.
  - Leaving this parameter empty means that all approved requests are counted.
- Staff placing a request on behalf of a patron will get an overrideable block, as per workbench preferences in Fulfillment (which role can override)

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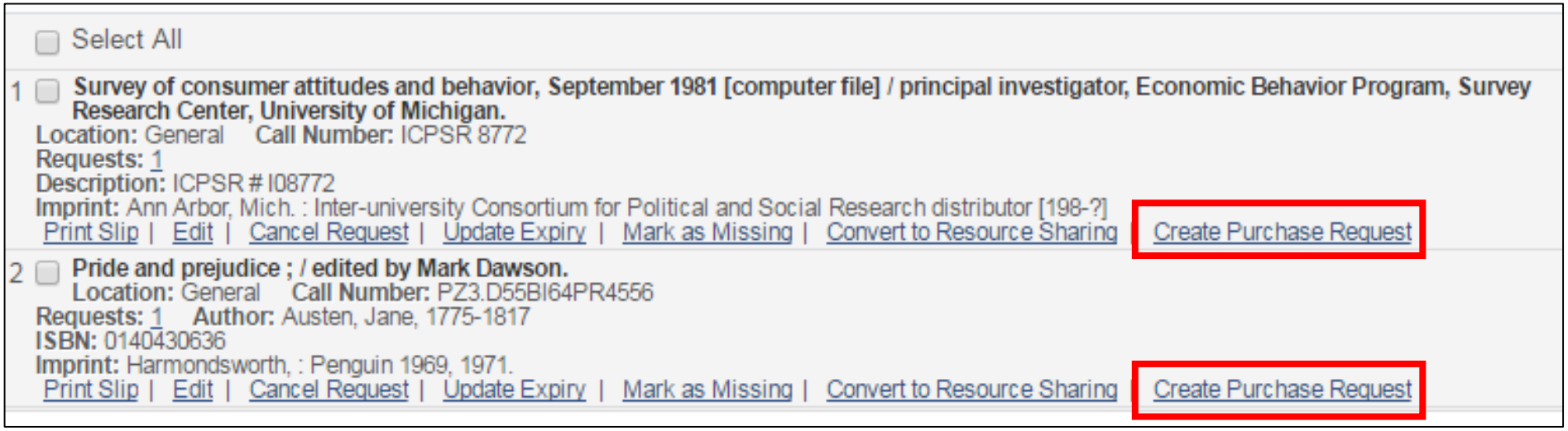
Future developments – create from Hold Request

- Privileged staff will be able to manually transform hold requests into Purchase Request



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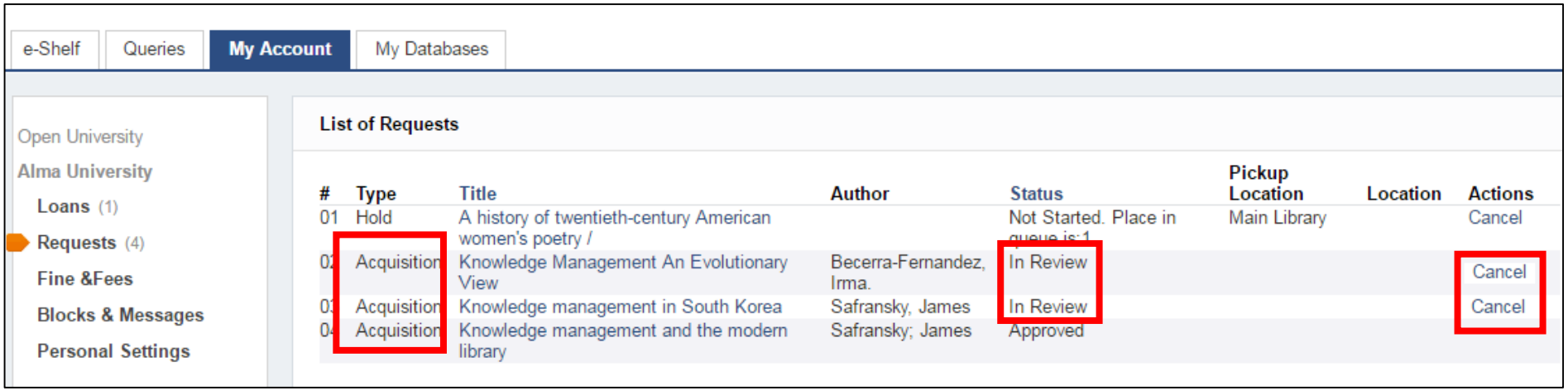
Future developments – cancel from My Account

- Users will be allowed to cancel pending purchase requests from My Account in Primo



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Thank you
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